

Morning Mantra

MARKET PREVIEW FROM SHAH INVESTOR'S HOME LIMITED'S VIEW

ISO 9001 : 2015 Certified



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MARKET COMMENTARY

Indian equity benchmarks ended in red terrain on Wednesday. After a cautious start, indices traded in red terrain during morning deals, amid report that India recorded 10,510 fresh Covid-19 cases of the coronavirus disease (Covid-19). The country reported a net reduction of 4,984 in active coronavirus cases to bring its count down at 143,416, which is 85.89 per cent lower than the September 18 peak of 1,017,754. India's share of global active coronavirus cases has declined to 0.56 per cent (one in 179). The caseload tally stands at 10,858,300. The country continues to be second-most-affected globally, and ranks 17th among worst-hit nations by active cases.

In the second half of the trading session, key indices again added losses but staged recovery during the last hour of the trade, after credit rating agency, India Ratings and Research (Ind-Ra) in its latest report has said that the gross domestic product (GDP) growth is likely to bounce back to 10.4% year on year (yoy) in FY22, primarily driven by the base effect. The street took a note of Minister of State for Finance Anurag Singh Thakur's statement that gross non-performing assets (NPAs) of public sector banks (PSBs) declined from Rs 8.96 lakh crore in March 2018 to Rs 6.09 lakh crore in September 2020 due to various measures taken by the government.

On the global front, European markets were trading mostly in red as investors absorbed a mixed bag of earnings from Societe Generale, A.P. Moeller-Maersk and other corporate. Asian markets ended mostly higher on Wednesday, after consumer prices in China were up 1.0 percent on month in January, the National Bureau of Statistics said on Wednesday - in line with expectations following the 0.7 percent increase in December. On a yearly basis, consumer prices fell 0.3 percent - shy of expectations for a flat reading following the 0.2 percent gain in the previous month. The bureau also said that producer prices rose 0.3 percent on year in January - missing forecasts for an increase of 0.4 percent after sinking 0.4 percent a month earlier.

MARKET SUMMARY

| Domestic Indices | Close | Points | % Change |
|------------------|----------|---------|----------|
| SENSEX | 51309.39 | -19.69 | -0.04 |
| NIFTY | 15106.50 | -2.80 | -0.04 |
| MIDCAP | 19810.13 | 140.22 | 0.71 |
| SMLCAP | 19420.07 | 81.30 | 0.42 |
| BSEFMC | 12609.04 | -14.33 | -0.11 |
| AUTO | 24850.01 | 234.46 | 0.95 |
| POWER | 2246.29 | -3.08 | -0.14 |
| REALTY | 2794.71 | 47.14 | 1.72 |
| BSE IT | 25864.76 | 26.48 | 0.10 |
| BANKEX | 40460.83 | -263.98 | -0.65 |
| OIL GAS | 14788.56 | -4.48 | -0.03 |
| METAL | 12655.63 | 36.64 | 0.29 |
| INDIA VIX | 23.95 | -0.32 | -1.31 |

ADVANCE-DECLINE

| Index | Advance | Decline | Unchanged |
|-------|---------|---------|-----------|
| NSE | 885 | 1050 | 89 |
| BSE | 1465 | 1499 | 161 |

MARKET TURNOVER (₹ in Crs)

| Segment | Current | Previous | Net % |
|----------|---------|----------|-------|
| BSE CASH | 4826 | 6506 | (26) |
| NSE CASH | 79032 | 82189 | (4) |
| NSE F&O | 4651298 | 3413814 | 36 |

KEY INDICES RATIOS

| INDEX | P/E | P/B | Dividend Yield |
|--------|-------|------|----------------|
| NIFTY | 41.81 | 4.28 | 1.05 |
| SENSEX | 35.67 | 3.47 | 0.80 |

FII & DII - CAPITAL MARKETS (₹ in Crs)

| FII-DII* | Buy | Sell | Net |
|----------|------|------|--------|
| DII | 4750 | 6826 | (2076) |
| FII | 9072 | 7285 | 1787 |

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

| FII | Buy | Sell | Net |
|---------------|-----------|-----------|-------|
| Index Futures | 4279.79 | 4138.82 | 141 |
| Index Options | 578374.08 | 575813.18 | 2561 |
| Stock Futures | 15095.79 | 15337.75 | (242) |
| Stock Options | 14205.15 | 14496.44 | (291) |

PUT-CALL RATIO

| Index | Current | Previous |
|------------|---------|----------|
| NIFTY | 1.30 | 1.38 |
| BANK NIFTY | 0.91 | 1.05 |

SECURITIES BAN FOR TRADE IN F&O FOR 11-02-2021

| |
|-------|
| BHEL |
| SAIL |
| SUNTV |

10-YEAR GOVERNMENT SECURITIES YIELD

| Country | Current | Previous | % Chg |
|---------|---------|----------|-------|
| INDIA | 6.012 | 6.074 | -1.02 |
| USA | 1.166 | 1.157 | 0.73 |

DOLLAR INDEX

| Dollar Index | Current | Previous | % Chg |
|--------------|---------|----------|-------|
| DXY | 90.36 | 90.44 | -0.09 |

CURRENCY FUTURES

| Expiry | Close | Chg Point | % Chg |
|--------------------|--------|-----------|-------|
| 24-Feb-21 USD-INR | 72.93 | -0.10 | -0.14 |
| 24-Feb-21 EUR-INR | 88.44 | 0.07 | 0.08 |
| 24-Feb-21 GBP-INR | 100.91 | 0.42 | 0.42 |
| 24-Feb-21 JPY- INR | 69.64 | -0.12 | -0.17 |

KEY COMMODITIES TRACKER

| Commodity | Current | Chg Point | % Chg |
|-------------|---------|-----------|-------|
| Gold | 1840.88 | 4.76 | 0.26 |
| Silver | 27.05 | -0.17 | -0.64 |
| Crude-Oil | 58.77 | 0.41 | 0.70 |
| Brent-Crude | 61.53 | 0.45 | 0.74 |

INDEX TREND ANALYSIS

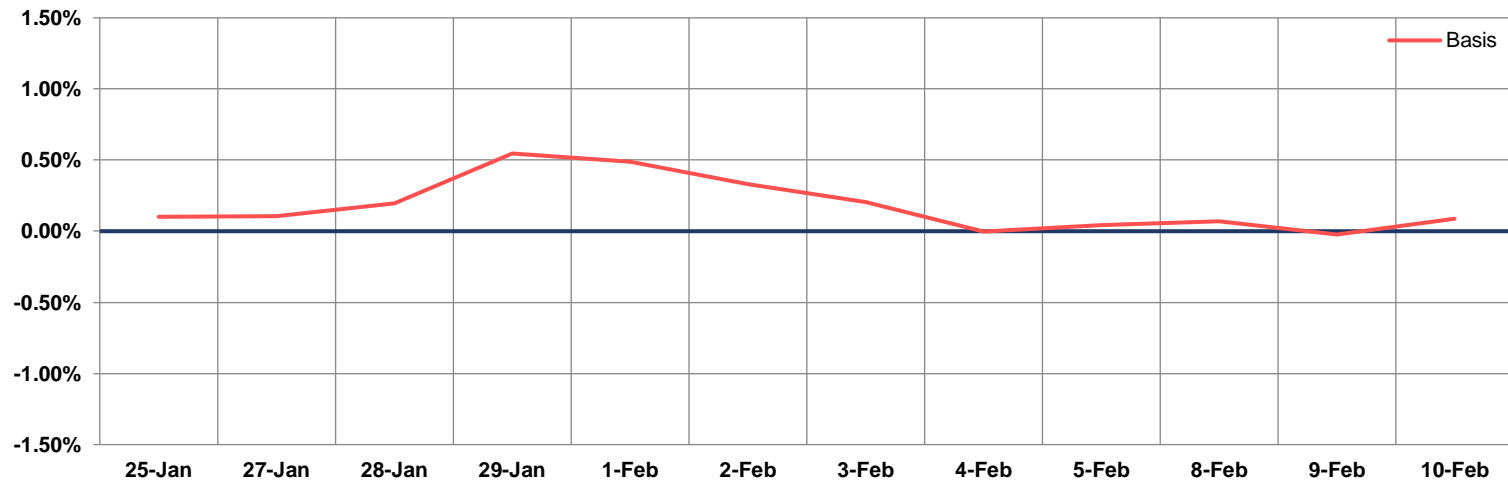
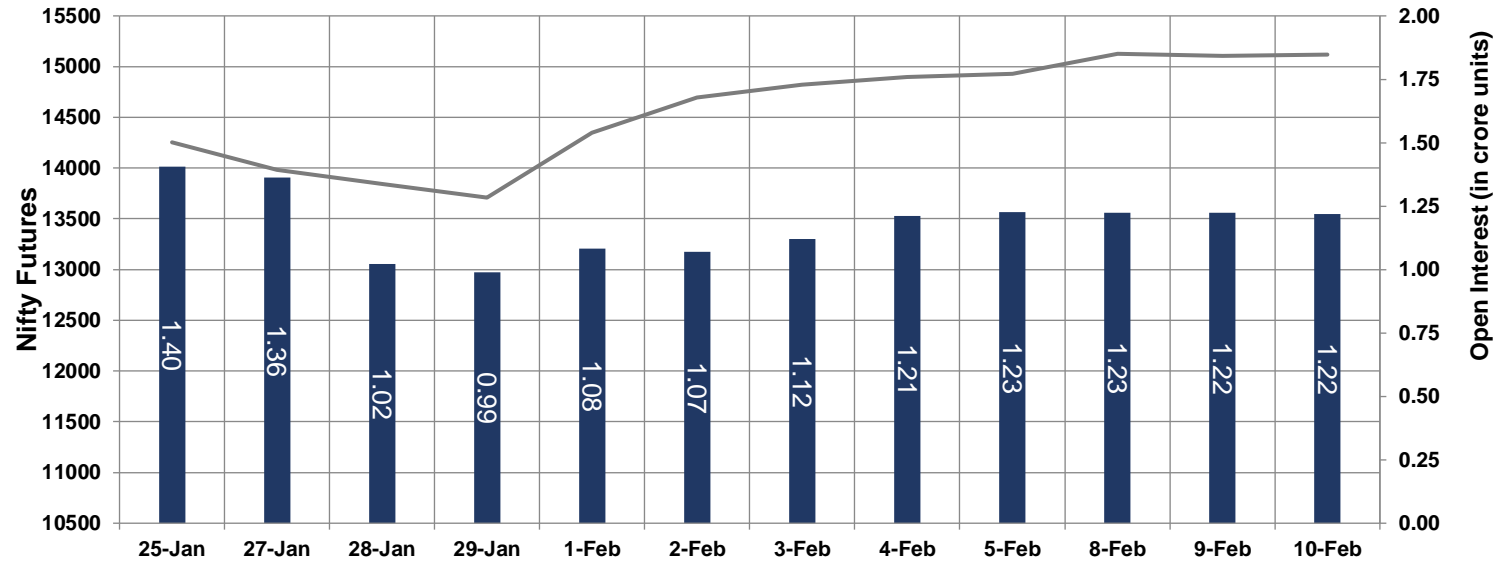
| INDEX | CLOSE | S2 | S1 | PIVOT | R1 | R2 | DAILY | WEEKLY | MONTHLY |
|---------------|-------|-------|-------|-------|-------|-------|-------|---------|---------|
| NIFTY | 15106 | 14893 | 15000 | 15084 | 15191 | 15275 | Buy | Buy | Buy |
| SENSEX | 51309 | 50556 | 50933 | 51223 | 51599 | 51889 | Buy | Buy | Buy |
| NIFTY FUTURES | 15157 | 14918 | 15037 | 15104 | 15223 | 15290 | Buy | Buy | Buy |
| BANK NIFTY | 35783 | 35014 | 35398 | 35813 | 36197 | 36612 | Buy | Buy | Buy |
| CNX IT | 25885 | 25428 | 25657 | 25799 | 26027 | 26170 | Buy | Buy | Buy |
| CNX MIDCAP | 22926 | 22531 | 22729 | 22850 | 23048 | 23169 | Buy | Buy | Buy |
| CNX SMALLCAP | 7775 | 7689 | 7732 | 7763 | 7806 | 7836 | Buy | Buy | Buy |
| INDIA VIX | 23.88 | 19.20 | 21.54 | 23.25 | 25.59 | 27.29 | Buy | Neutral | Buy |

NIFTY TECHNICAL & INDICES LEVEL

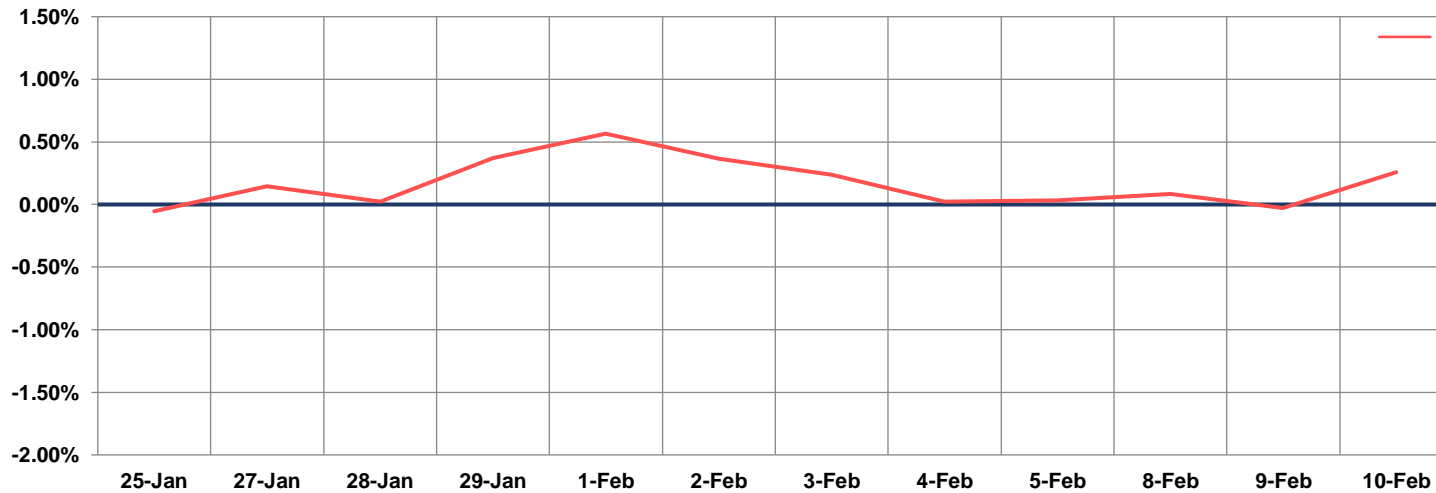
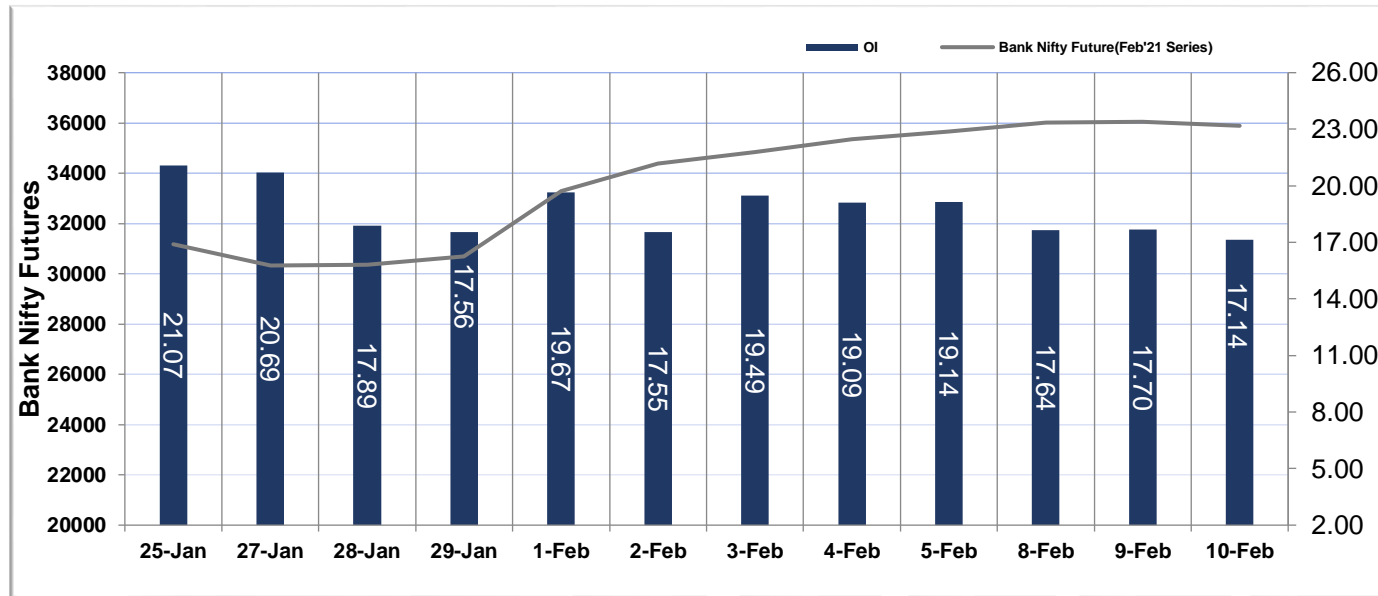


- Nifty Cash prices have settled at 15106.50 marginally down by 0.04 percent from the previous close. On the upper side it has resistance of **15193** and **15230** levels, while lower side it has support of **15040** and **14970** levels. Intraday traders should be cautious and take position accordingly.

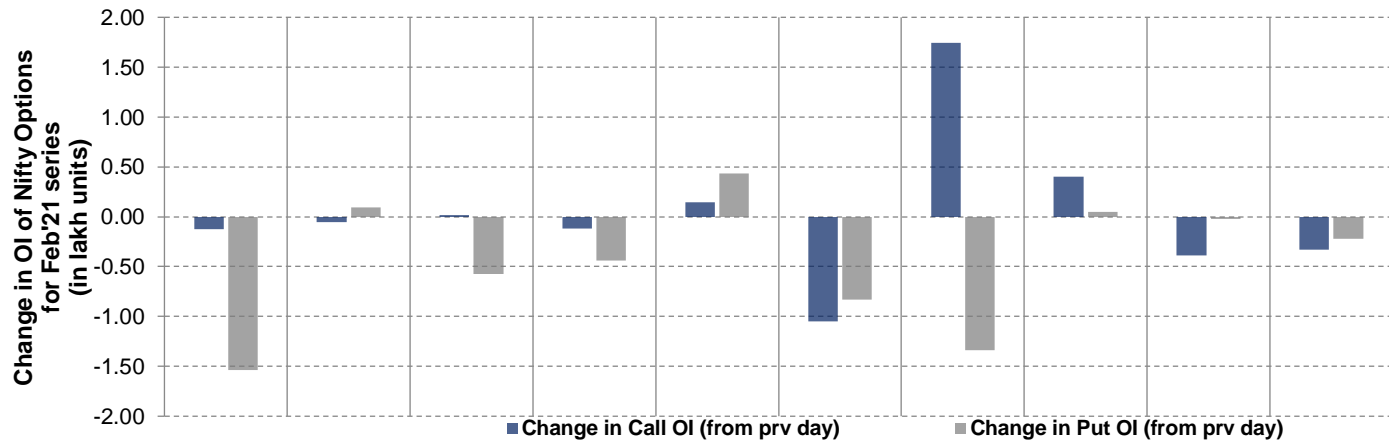
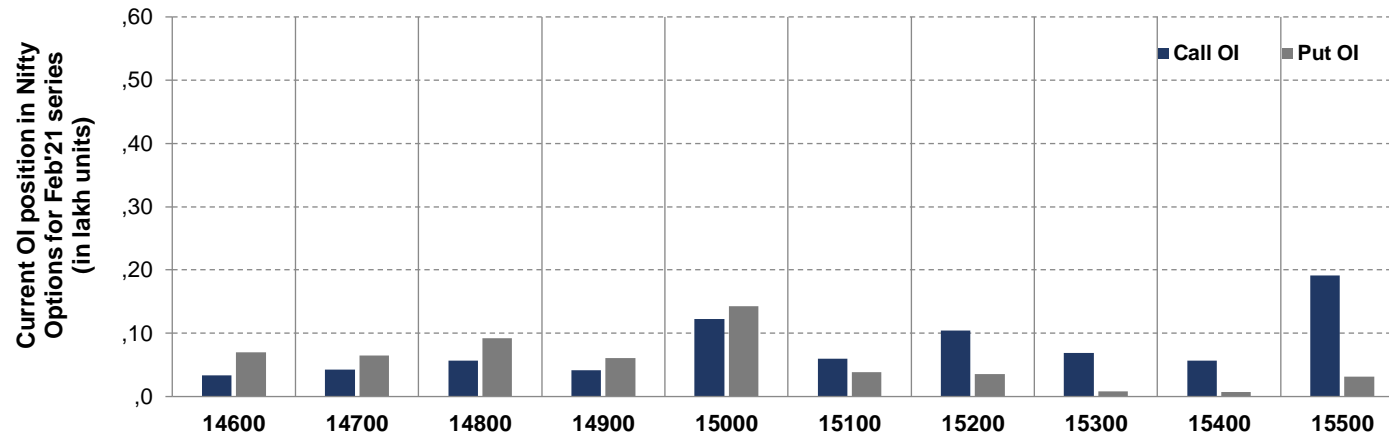
NIFTY FUTURES



BANK NIFTY FUTURES



NIFTY OPTIONS



- Among Nifty calls 15,500 SP from the Feb month expiry was the most active call with a reduction of 0.03 million in open interests.
- Among Nifty puts 15,000 SP from the Feb month expiry was the most active put with an addition of 0.04 million in open interests.
- The maximum OI outstanding for Calls was at 15,500 SP (1.92mn) and that for Puts was at 15,000 SP (1.43mn)

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