

Morning Mantra

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

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MARKET COMMENTARY

Indian equity benchmarks ended flat on Friday. After a cautious start, markets traded in green for the most part of the session, taking support with Moody's Investors Service in its latest report stated that India's economic recovery reduces the risk of a sharp deterioration in public sector banks' (PSBs) asset quality. But, it said the capital would remain insufficient to support credit growth and absorb unexpected shocks. Some support also came as leading trade bodies are expecting that the outbound shipments will rise in the coming months as the uncertainty in global markets began to subside.

Domestic sentiments remained positive, amid reports that exporters urged the government to provide support measures in the next foreign trade policy (FTP), being formulated by the commerce ministry, to boost the country's outbound shipments. Different suggestions were made by representatives of different export promotion councils during their meeting with the commerce ministry. Some support came after the government approved applications from several medical devices manufacturers under the Production Linked Incentive (PLI) scheme for the promotion of domestic manufacturing.

In the second half of the trading session, key indices turned negative but staged recovery to end the trading day on a flat note, after Union Minister of State for Finance Anurag Thakur has said that the budget shows hope to build a new India and will lead the nation on the path of becoming an economic and manufacturing powerhouse. Traders took note of Commerce and Industry Minister Piyush Goyal's statement that the government has constituted a committee comprising members from public and private sectors to look into issues like promoting localisation and boosting manufacturing.

On the global front, European markets were trading lower after the bell as new data published by the Office for National Statistics (ONS) showed UK GDP declined by 9.9% last year, which was the largest contraction on record. Asian markets ended in red, after South Korea's unemployment rate rose to a 21-year high in January. The data from Statistics Korea showed that the jobless rate rose to a seasonally adjusted 5.4 percent in January from 4.5 percent in December. This was the highest rate since 1999. In the same month last year, the unemployment rate was 3.9 percent. On an unadjusted basis, the unemployment rate increased to 5.7 percent in January from 4.1 percent in the previous month.

MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	51544.30	12.78	0.02
NIFTY	15163.30	-10.00	-0.07
MIDCAP	19911.03	12.55	0.06
SMLCAP	19622.05	-3.96	-0.02
BSEFMC	12507.55	-200.54	-1.58
AUTO	24636.35	-111.21	-0.45
POWER	2251.39	5.24	0.23
REALTY	2792.79	3.09	0.11
BSE IT	25973.78	110.28	0.43
BANKEK	40835.90	400.60	0.99
OIL GAS	14805.69	-206.96	-1.38
METAL	12543.01	-242.89	-1.90
INDIA VIX	22.04	-1.01	-4.38

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	852	1058	90
BSE	1418	1560	156

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	4881	4631	5
NSE CASH	73133	66921	9
NSE F&O	2059106	6881039	(70)

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	41.58	4.30	1.05
SENSEX	35.80	3.48	0.79

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	3648	4245	(597)
FII	4252	4289	(37)

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	3410.24	4143.14	(733)
Index Options	262283.81	264738.19	(2454)
Stock Futures	14221.62	14199.75	22
Stock Options	16028.65	16167.56	(139)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.38	1.36
BANK NIFTY	1.09	0.90

SECURITIES BAN FOR TRADE IN F&O FOR 15-02-2021

BHEL
SAIL

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	5.990	5.962	0.00
USA	1.210	1.200	0.82

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	90.44	90.41	0.03

CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
24-Feb-21 USD-INR	72.73	-0.21	-0.29
24-Feb-21 EUR-INR	88.00	-0.43	-0.48
24-Feb-21 GBP-INR	100.20	-0.59	-0.59
24-Feb-21 JPY- INR	69.27	-0.39	-0.56

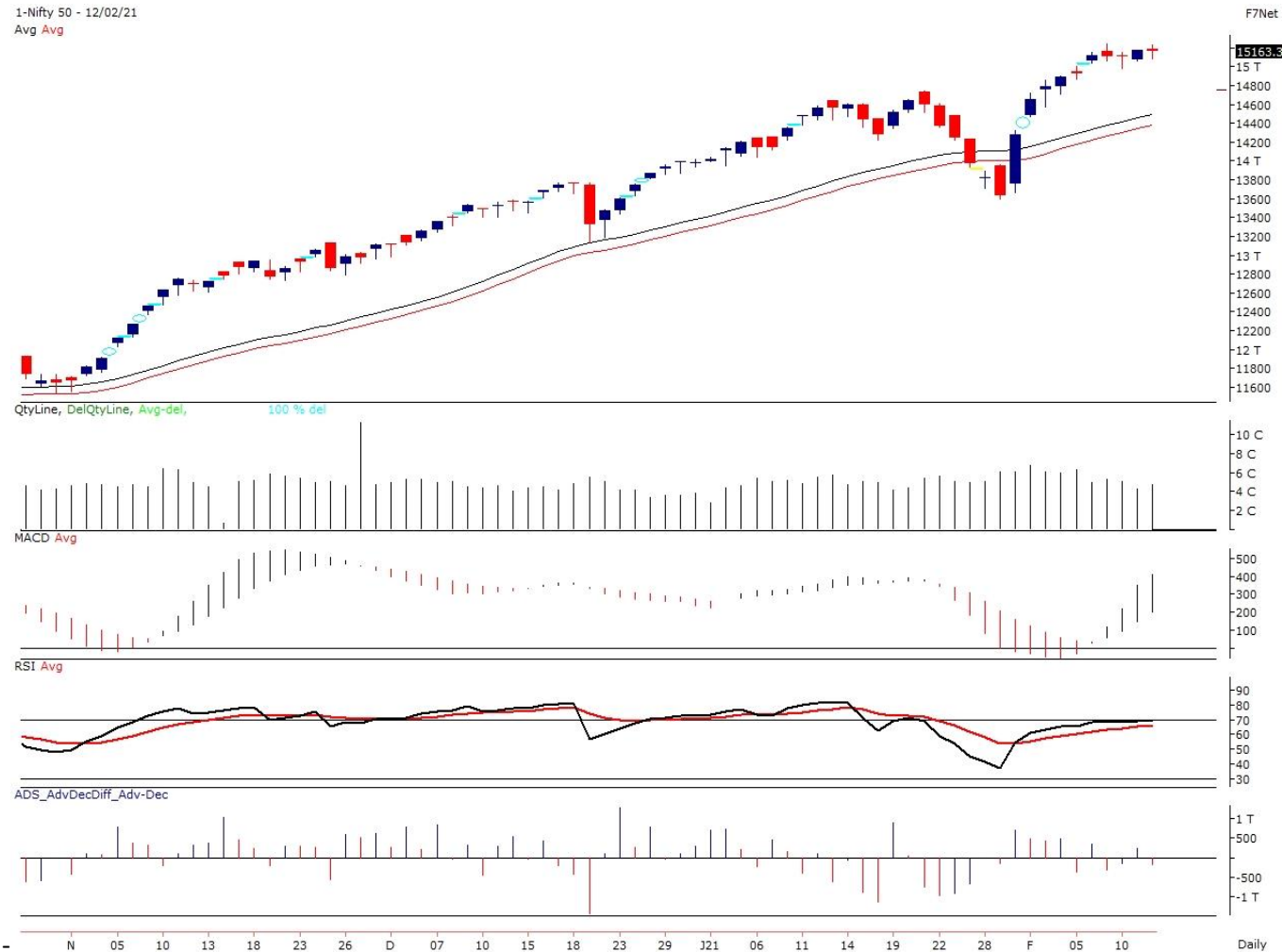
KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1823.57	-3.50	-0.17
Silver	27.30	0.32	1.19
Crude-Oil	59.71	1.47	2.52
Brent-Crude	62.71	1.57	2.57

INDEX TREND ANALYSIS

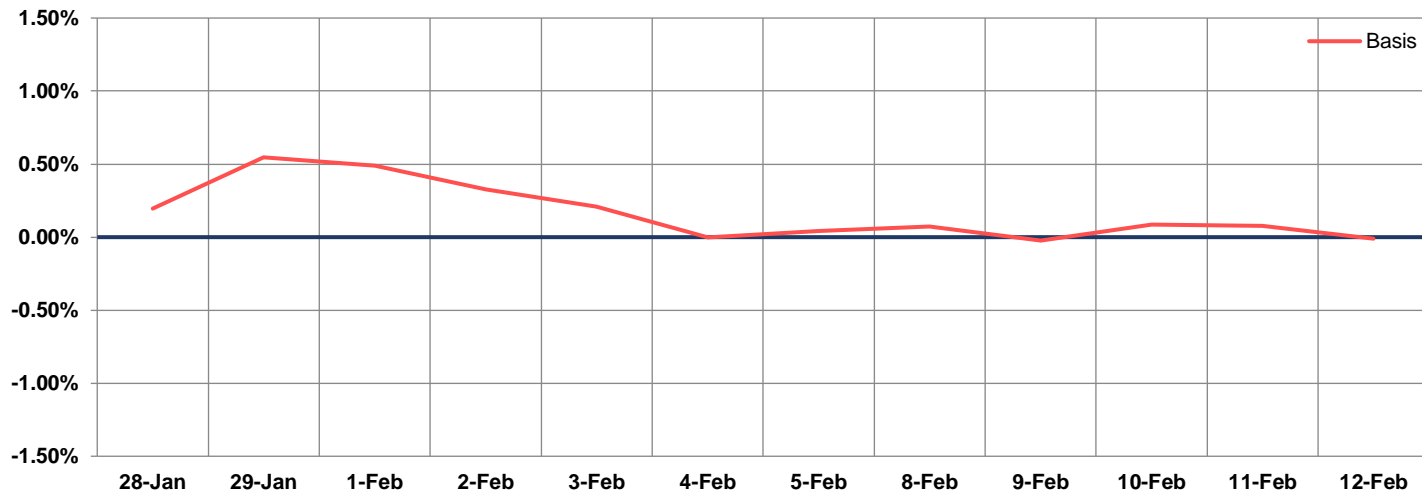
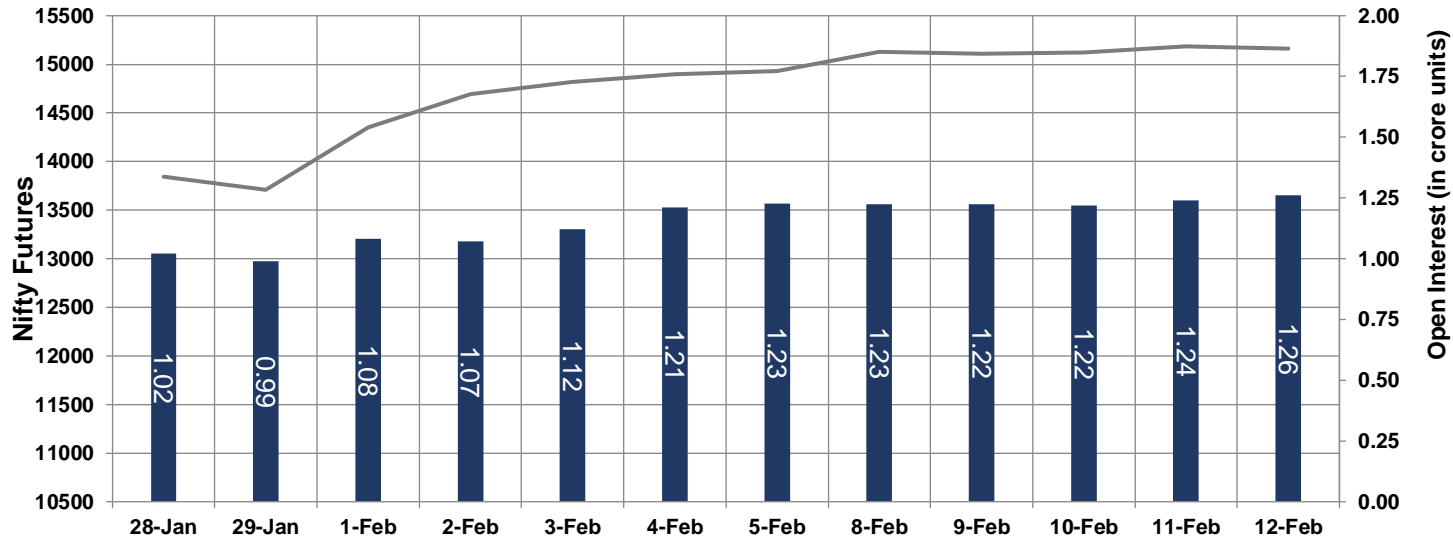
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	15163	15000	15082	15163	15244	15325	Buy	Buy	Buy
SENSEX	51544	50992	51268	51536	51812	52080	Buy	Buy	Buy
NIFTY FUTURES	15161	14911	15076	15156	15241	15321	Buy	Buy	Buy
BANK NIFTY	36109	35421	35765	36044	36388	36666	Buy	Buy	Buy
CNX IT	26094	25744	25919	26187	26362	26630	Buy	Buy	Buy
CNX MIDCAP	22914	22644	22779	22917	23052	23190	Buy	Buy	Buy
CNX SMALLCAP	7931	7842	7886	7936	7980	8030	Buy	Buy	Buy
INDIA VIX	22.04	19.83	20.93	22	23.11	24.17	Neutral	Neutral	Buy

NIFTY TECHNICAL & INDICES LEVEL

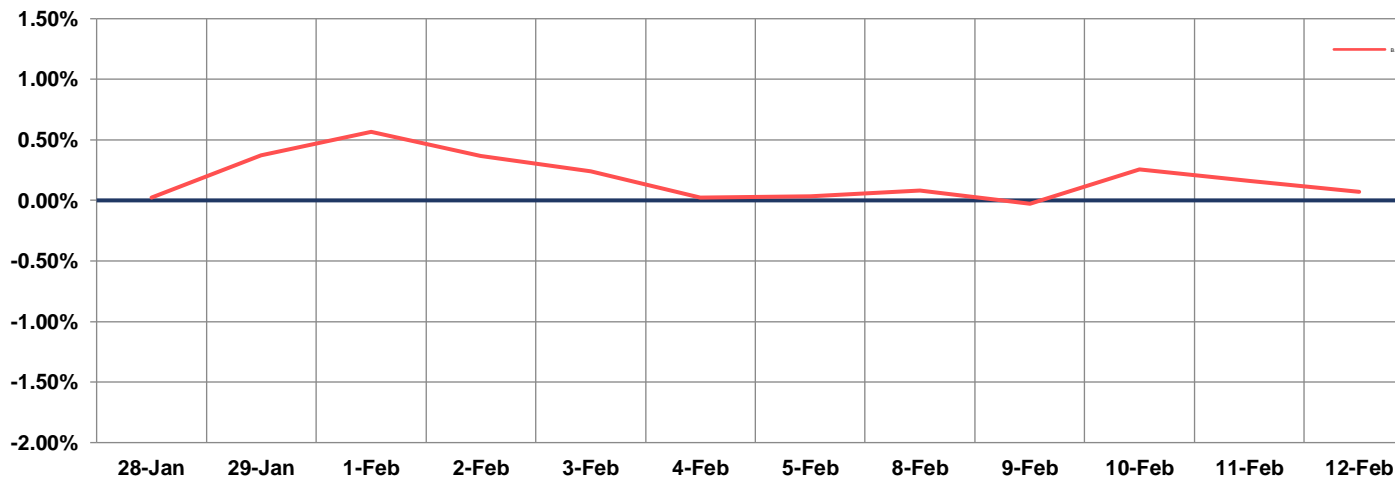
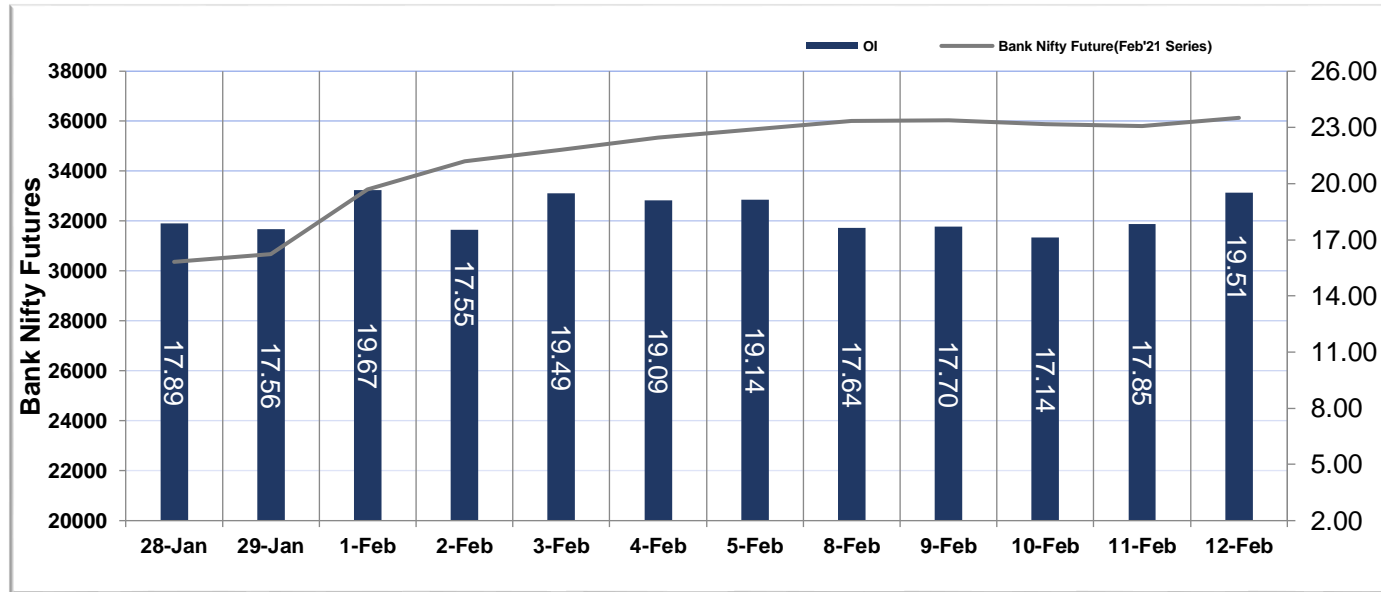


➤ Nifty Cash prices have settled at 15163.30 down by 0.07 percent from the previous close. On the upper side it has resistance of **15230** and **15390** levels, while lower side it has support of **15040** and **14950** levels. Intraday traders should be cautious and take position accordingly.

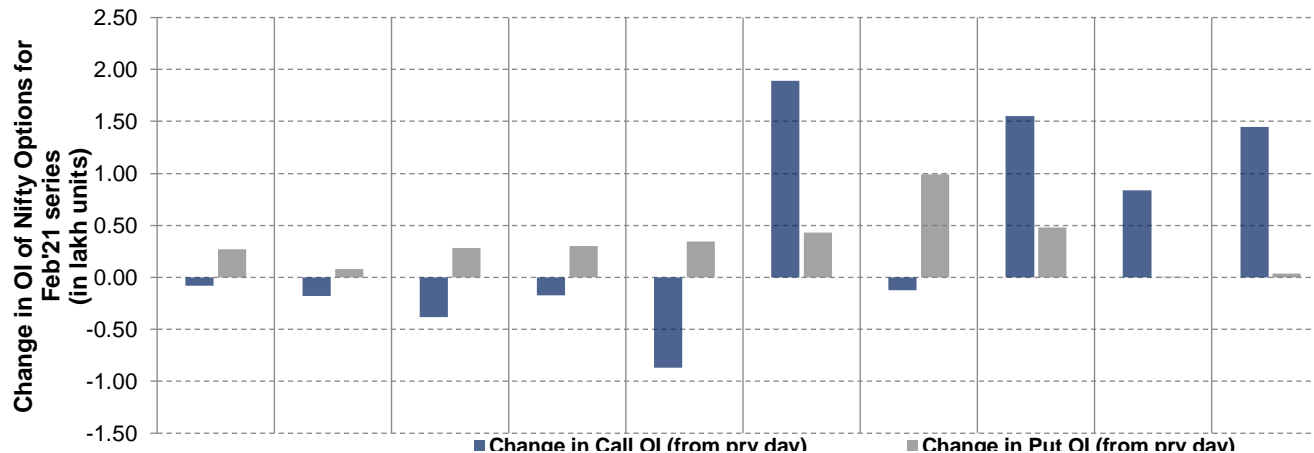
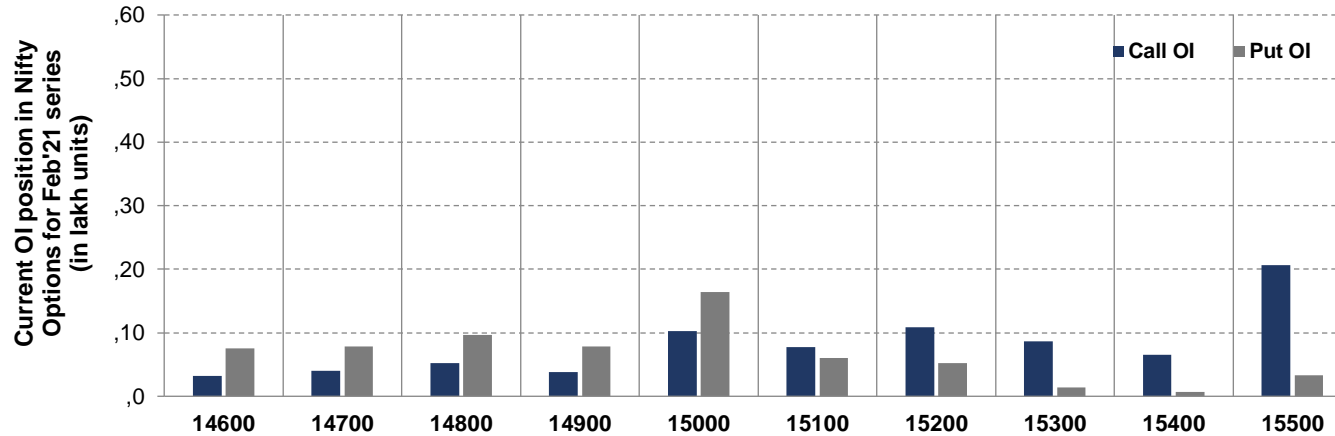
NIFTY FUTURES



BANK NIFTY FUTURES



NIFTY OPTIONS



- Among Nifty calls 15,500 SP from the Feb month expiry was the most active call with an addition of 0.14 million in open interests.
- Among Nifty puts 15,000 SP from the Feb month expiry was the most active put with an addition of 0.03 million in open interests.
- The maximum OI outstanding for Calls was at 15,500 SP (2.06mn) and that for Puts was at 15,000 SP (1.64mn)

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