

Morning Mantra

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

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MARKET COMMENTARY

Monday turned out to be a fabulous day of trade for Indian equity benchmarks with frontline gauges ending above their crucial 52,100 (Sensex) and 15,300 (Nifty), hitting record closing highs on Monday. Markets started the session with a gap up opening as traders took support from encouraging macro-economic data. The Index of Industrial Production (IIP) grew by 1 per cent in December on a year-on-year (Y-o-Y) basis compared with a 2 per cent decline in the previous month, the data released by the National Statistical Office showed. On the other hand, the consumer price index (CPI)-based inflation rate fell for the third consecutive month to 4.06 per cent in January as food inflation, pulled down by deflation in vegetables, drastically declined. Some support came in as PHDCCI said expectations that the country's GDP would record growth in the third and fourth quarters of 2020-21 are getting stronger on account of various reforms undertaken by the government in the last ten months.

Markets witnessed some consolidation in mid-day trade as traders remained watchful after the wholesale price index (WPI)-based inflation rate rose to 2.03 per cent in January from 1.22 per cent in the previous month as fuel and non-food manufactured products faced price pressures. Markets gained momentum in dying hour of trade to end near intraday high levels. Adding more optimism, Chief Economic Adviser K V Subramanian said the reform measures announced in the Budget 2021-22 will play a big role in India becoming a \$5 trillion economy and beyond.

Firm opening in European counters too aided sentiments with all the European key gauges trading in green on vaccine rollouts and recovery hopes. Asian markets ended in green amid signs of a slowdown in the rate of coronavirus infections and the progress being made with vaccines.

Back home, insurance industry stocks remained in limelight with report that the Finance Ministry will infuse Rs 3,000 crore capital into state-owned general insurance companies during the current quarter in a bid to improve their financial health. However, stocks related to information technologies edged lower despite Nasscom's report that the Indian IT industry revenues are set to grow by 2.3 per cent to \$194 billion in FY2020-21 and the exports will go up by 1.9 per cent to \$150 billion. The industry remained a net hirer in the fiscal year, which saw a major hit across the world because of the COVID-19 pandemic, with 1.38 lakh new jobs added to take overall employment to 44.7 lakh.

MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	52154.13	609.83	1.18
NIFTY	15314.70	151.40	1.00
MIDCAP	20189.69	278.66	1.40
SMLCAP	19693.87	71.82	0.37
BSEFMC	12501.30	-6.25	-0.05
AUTO	24745.56	109.21	0.44
POWER	2264.50	13.11	0.58
REALTY	2833.46	40.67	1.46
BSE IT	25813.42	-160.36	-0.62
BANKEX	42187.14	1351.24	3.31
OIL GAS	14757.56	-48.13	-0.33
METAL	12489.44	-53.57	-0.43
INDIA VIX	21.48	-1.57	-6.81

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	859	1111	72
BSE	1358	1681	154

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	4445	4881	(9)
NSE CASH	68908	73133	(6)
NSE F&O	2416393	2059106	17

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	41.59	4.34	1.04
SENSEX	36.21	3.52	0.71

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	4294	5342	(1049)
FII	5122	3887	1234

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	4223.06	3700	523
Index Options	268552.43	266965.50	1587
Stock Futures	13817.35	13510.22	307
Stock Options	16319.73	16120.45	199

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.57	1.38
BANK NIFTY	1.57	1.09

SECURITIES BAN FOR TRADE IN F&O FOR 16-02-2021

BHEL
SAIL

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.026	5.990	0.60
USA	1.210	1.200	0.82

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	90.40	90.41	-0.01

CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
24-Feb-21 USD-INR	72.70	0.00	0.00
24-Feb-21 EUR-INR	88.25	0.22	0.26
24-Feb-21 GBP-INR	101.08	0.88	0.87
24-Feb-21 JPY- INR	69.09	-0.18	-0.26

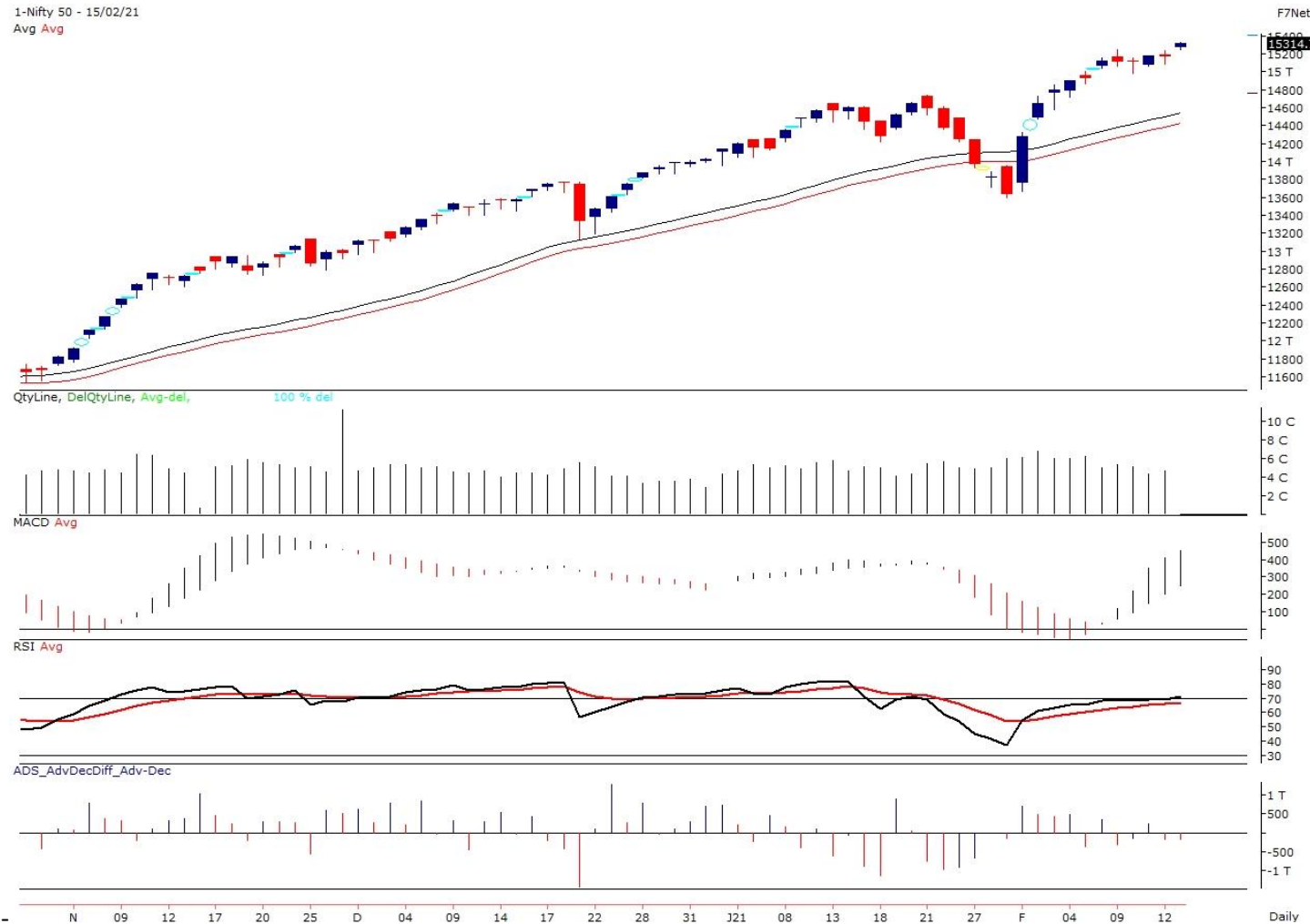
KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1818.04	-5.09	-0.28
Silver	27.56	0.26	0.92
Crude-Oil	60.31	0.84	1.38
Brent-Crude	63.14	0.69	1.12

INDEX TREND ANALYSIS

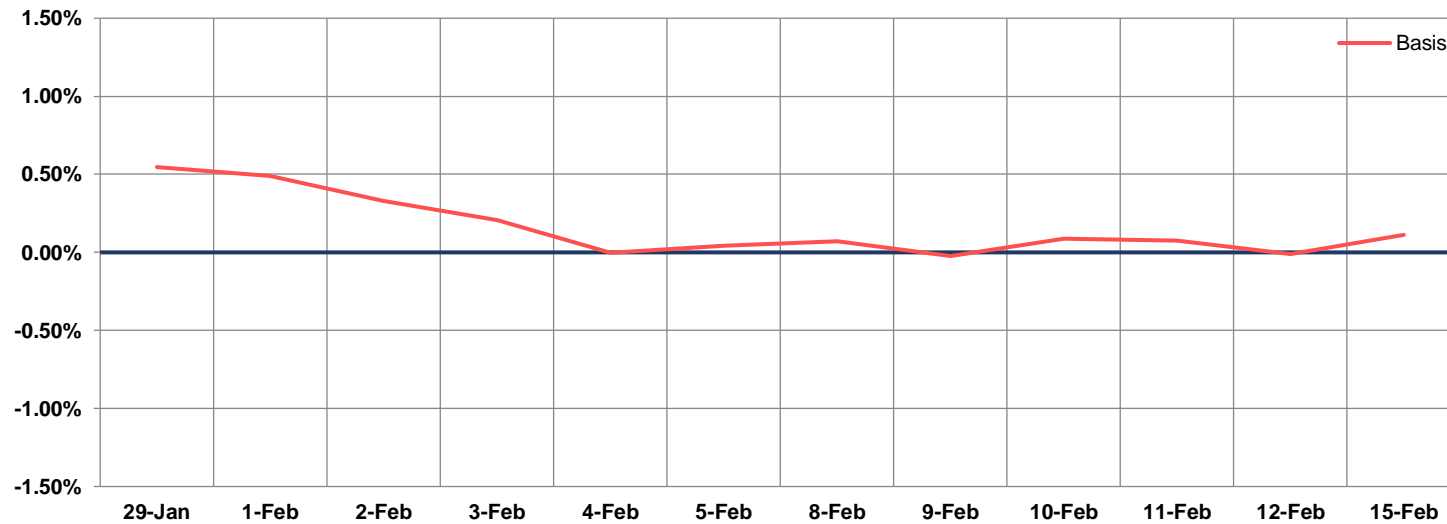
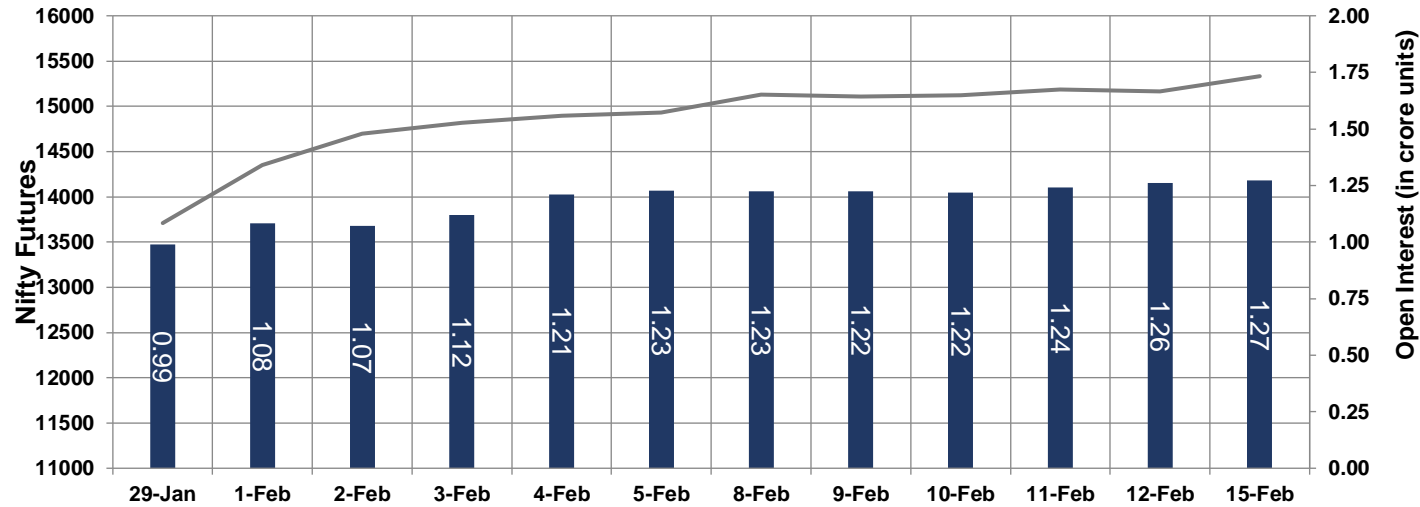
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	15315	15203	15259	15299	15355	15936	Buy	Buy	Buy
SENSEX	52154	51743	51948	52092	52298	52442	Buy	Buy	Buy
NIFTY FUTURES	15353	15200	15277	15317	15393	15433	Buy	Buy	Buy
BANK NIFTY	37306	36009	36658	37054	37702	38098	Buy	Buy	Buy
CNX IT	26001	25760	25880	26080	26201	26400	Buy	Buy	Buy
CNX MIDCAP	23214	22860	23037	23149	23326	23124	Buy	Buy	Buy
CNX SMALLCAP	7964	7904	7934	7975	8004	8045	Buy	Buy	Buy
INDIA VIX	21.48	19.99	20.73	21.56	22.30	23.13	Neutral	Neutral	Buy

NIFTY TECHNICAL & INDICES LEVEL

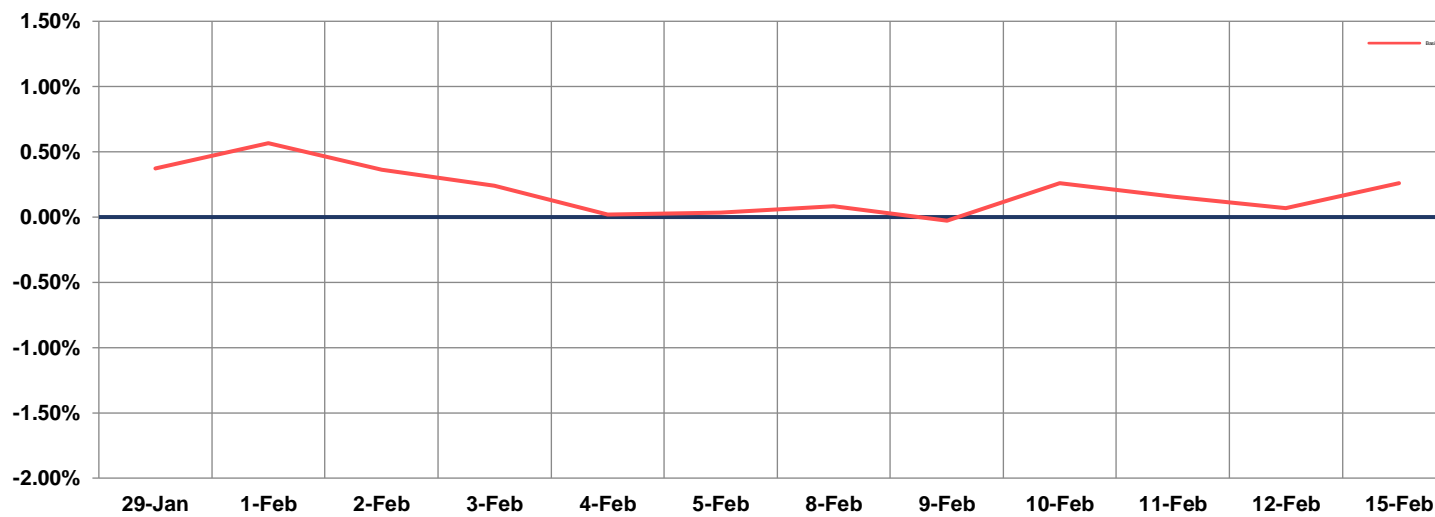
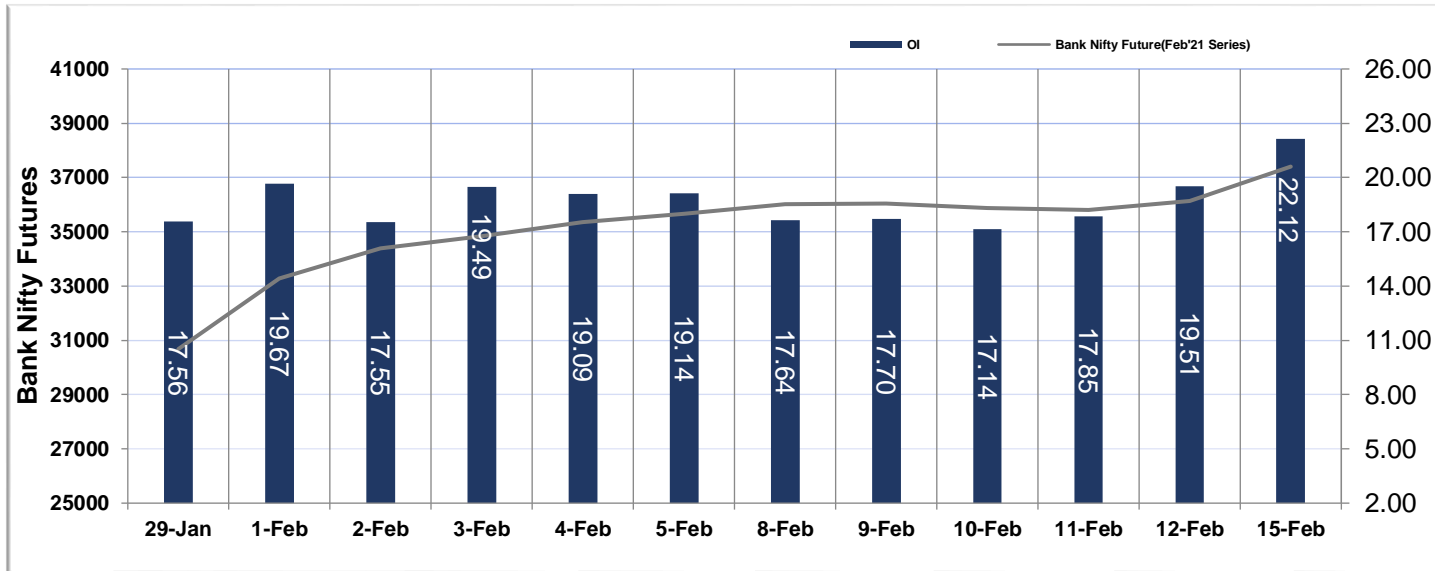


➤ Nifty Cash prices have settled at 15314.70 up by 1.00 percent from the previous close. On the upper side it has resistance of **15430** and **15510** levels, while lower side it has support of **15230** and **15170** levels. Intraday traders should be cautious and take position accordingly.

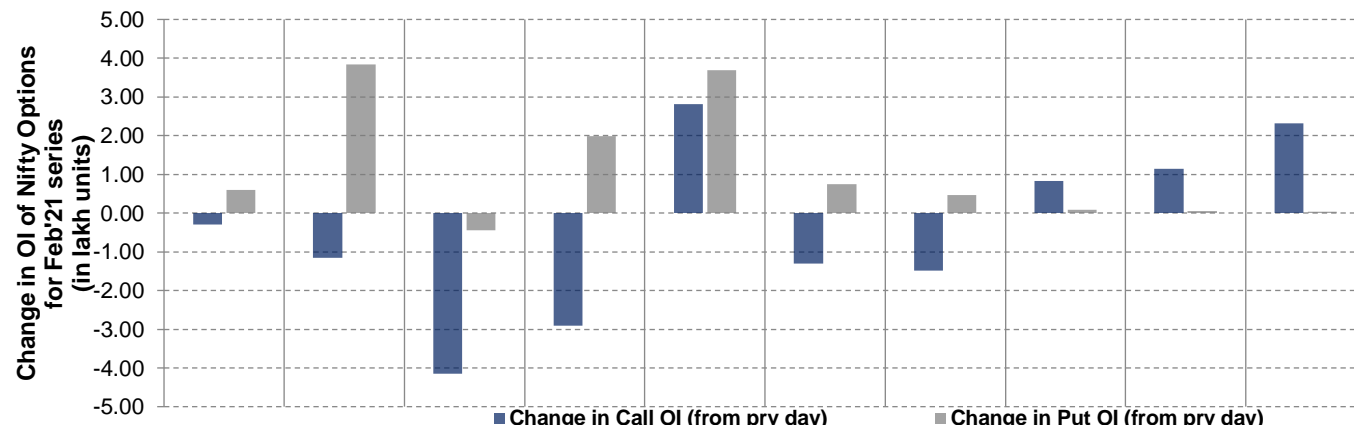
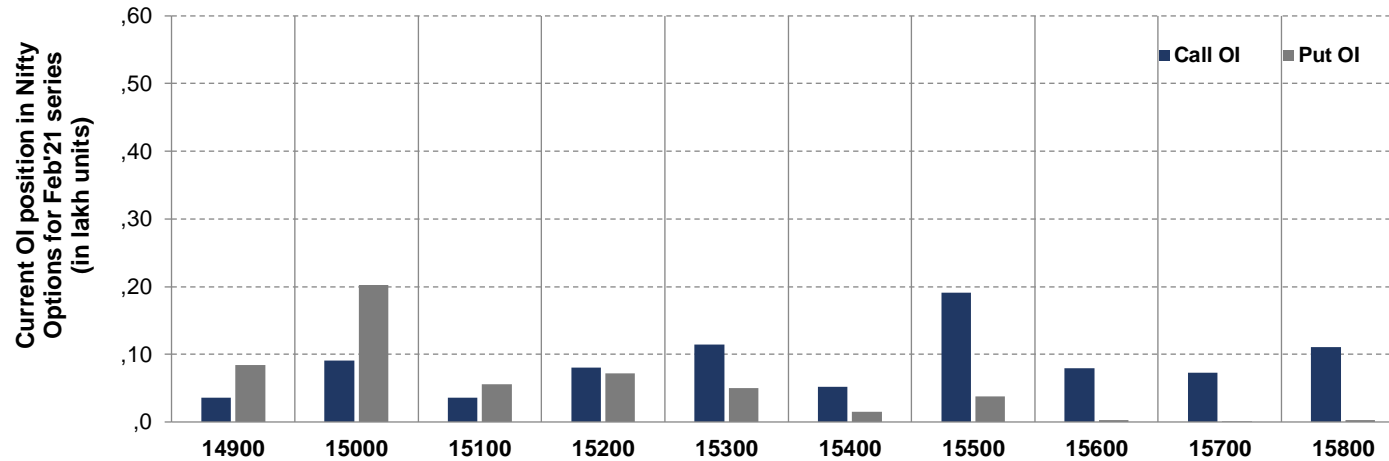
NIFTY FUTURES



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 0.15 million in open interests.
- Among Nifty puts 15,000 SP from the Feb month expiry was the most active put with an addition of 0.40 million in open interests.
- The maximum OI outstanding for Calls was at 15,500 SP (1.91mn) and that for Puts was at 15,000 SP (2.02mn)

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