

# Morning Mantra

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

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## MARKET COMMENTARY

Indian equity benchmarks ended Wednesday's trading session on lower note. After a negative start, indices traded in red terrain, as India registered 11,795 fresh Covid-19 cases of the coronavirus disease (Covid-19). Active cases in India stand at 137,866, while the caseload tally has risen to 10,937,106. The country continues to be second-most-affected globally, and ranks 17th among worst-hit nations by active cases. Also, there was some cautiousness as Maharashtra chief minister Uddhav Thackeray warned that if Covid-related norms are not followed, the state government will be forced to reimpose a lockdown.

In late morning deals, markets managed to cut most of their losses, taking support with ICRA ratings report that after two consecutive quarters of contraction, India's GDP is set to revert to the growth territory in the October-December 2020 period compared to the year-ago period. It said private consumption and government spending will help the economy post a turnaround during the December quarter and the GDP will grow 0.7 per cent. Traders were seen taking a note of reports that the finance ministry asked departments and ministries to surrender savings, if any, for the current financial year 2020-21 by March 20.

However, indices again added more losses in the second half of the session, as sentiments remained down-beat with Rating agency Crisil expects stressed assets of non-banking financial companies (NBFCs) to touch Rs 1.5-1.8 lakh crore or 6-7.5% of the assets under management (AUM) by the end of the current financial year. However, reported gross non-performing assets would be limited due to the one-time Covid-19 restructuring window and the micro, small and medium enterprises (MSMEs) recast scheme offered by the Reserve Bank of India (RBI). Unlike previous crises, the pandemic has impacted almost all NBFC asset segments.

On the global front, European markets were trading lower as investors monitor rising bond yields. Asian markets ended mostly lower on Wednesday, even after the total value of core machine orders in Japan gained a seasonally adjusted 5.2 percent on month in December, the Cabinet Office said on Wednesday - standing at 899.6 billion yen. That beat expectations for a decline of 6.2 percent following the 1.5 percent increase in November. On a yearly basis, core machine orders jumped 11.8 percent - again exceeding expectations for a fall of 3.0 percent after tumbling 11.3 percent in the previous month.

## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	51703.83	-400.34	-0.77
NIFTY	15208.90	-104.55	-0.68
MIDCAP	20236.63	8.56	0.04
SMLCAP	19883.29	104.62	0.53
BSEFMC	12340.82	-73.06	-0.59
AUTO	24762.99	55.49	0.22
POWER	2371.33	29.51	1.26
REALTY	2822.91	-18.59	-0.65
BSE IT	25340.65	-226.94	-0.89
BANKEX	41671.51	-292.55	-0.70
OIL GAS	14977.07	-8.73	-0.06
METAL	12915.83	41.14	0.32
INDIA VIX	21.50	-0.28	-1.26

## ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	916	1010	86
BSE	1476	1491	140

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	4775	4933	(3)
NSE CASH	77145	77083	0
NSE F&O	4317511	3660813	18

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	41.49	4.31	1.04
SENSEX	36.01	3.49	0.69

## FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	4441	5725	(1283)
FII	8499	7491	1008

Note: FII & DII Figures are provisional

## FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	4275.15	4457.46	(182)
Index Options	527632.49	527593.37	39
Stock Futures	15705.36	16355.88	(651)
Stock Options	16241.84	16337.78	(96)

## PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.16	1.29
BANK NIFTY	0.97	1.00

## SECURITIES BAN FOR TRADE IN F&O FOR 18-02-2021

IDEA
PNB
SAIL

## 10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.034	6.022	0.20
USA	1.294	1.299	-0.39

## DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	90.99	90.50	0.54

## CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
24-Feb-21 USD-INR	72.80	0.02	0.02
24-Feb-21 EUR-INR	87.89	-0.65	-0.74
24-Feb-21 GBP-INR	100.88	-0.48	-0.47
24-Feb-21 JPY- INR	68.73	-0.46	-0.66

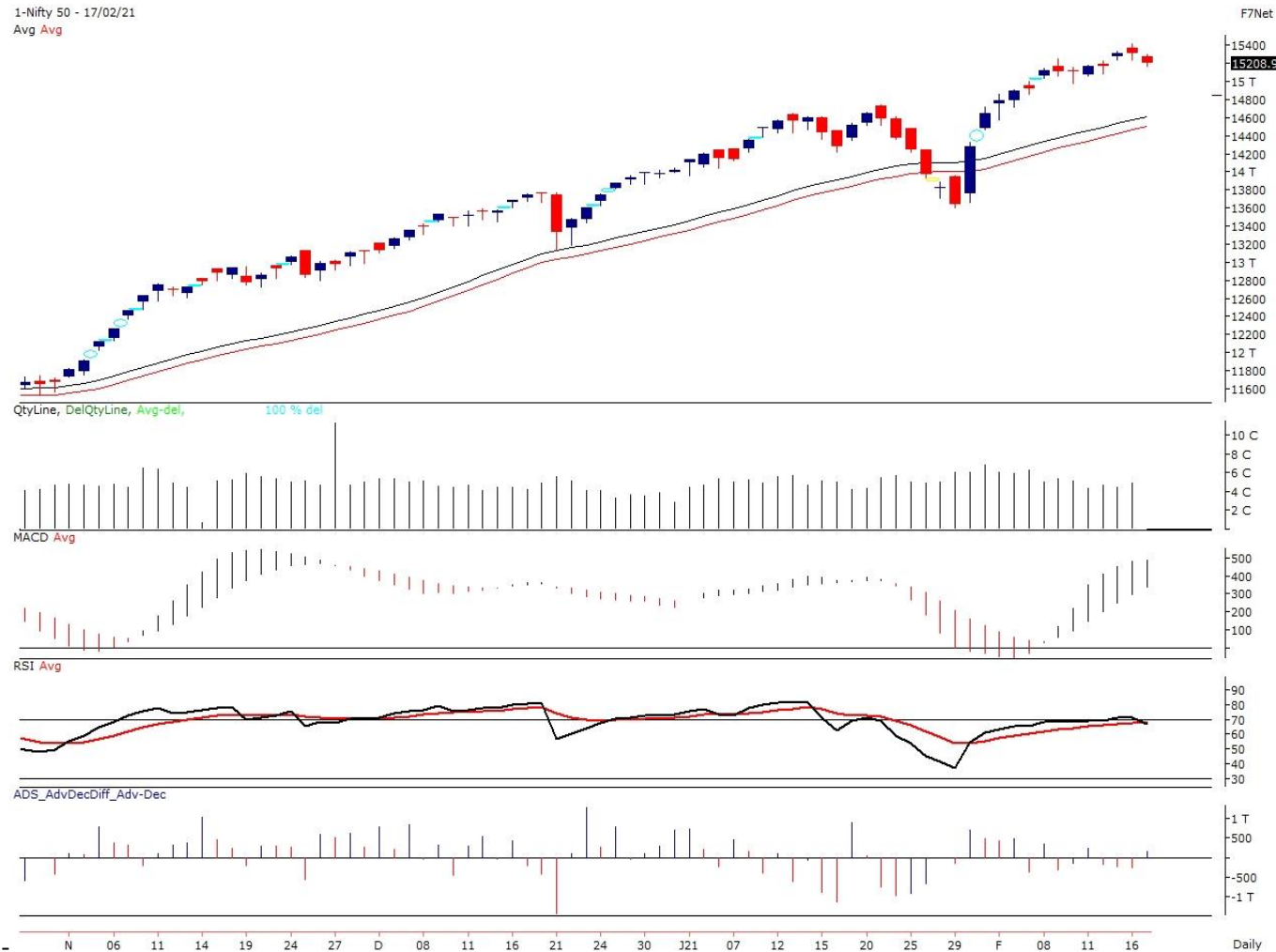
## KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1777.11	-11.34	-0.62
Silver	27.03	-0.02	-0.09
Crude-Oil	60.12	0.07	0.12
Brent-Crude	63.56	0.22	0.33

## INDEX TREND ANALYSIS

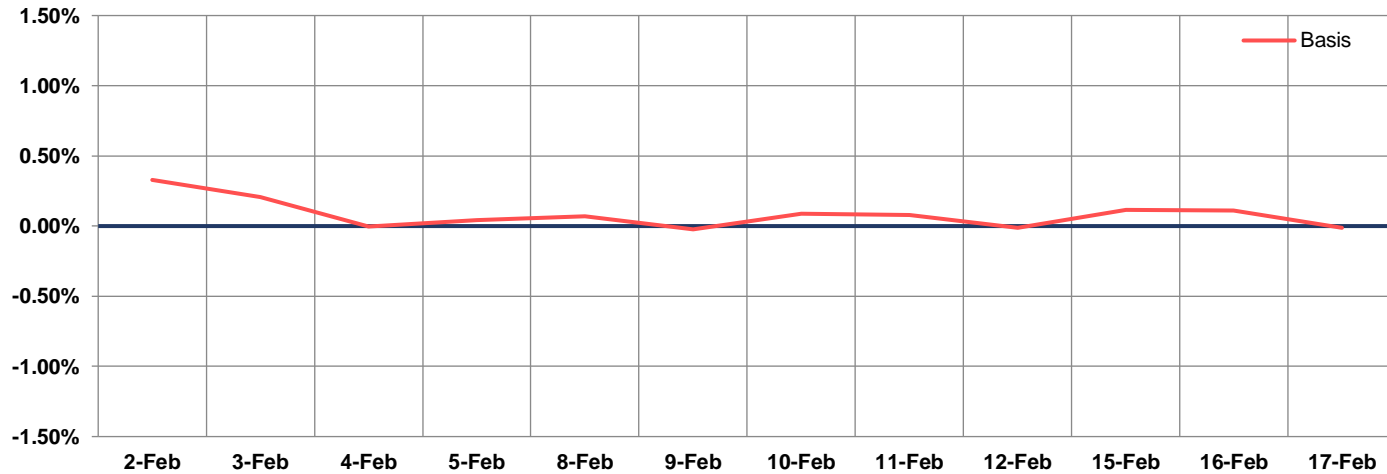
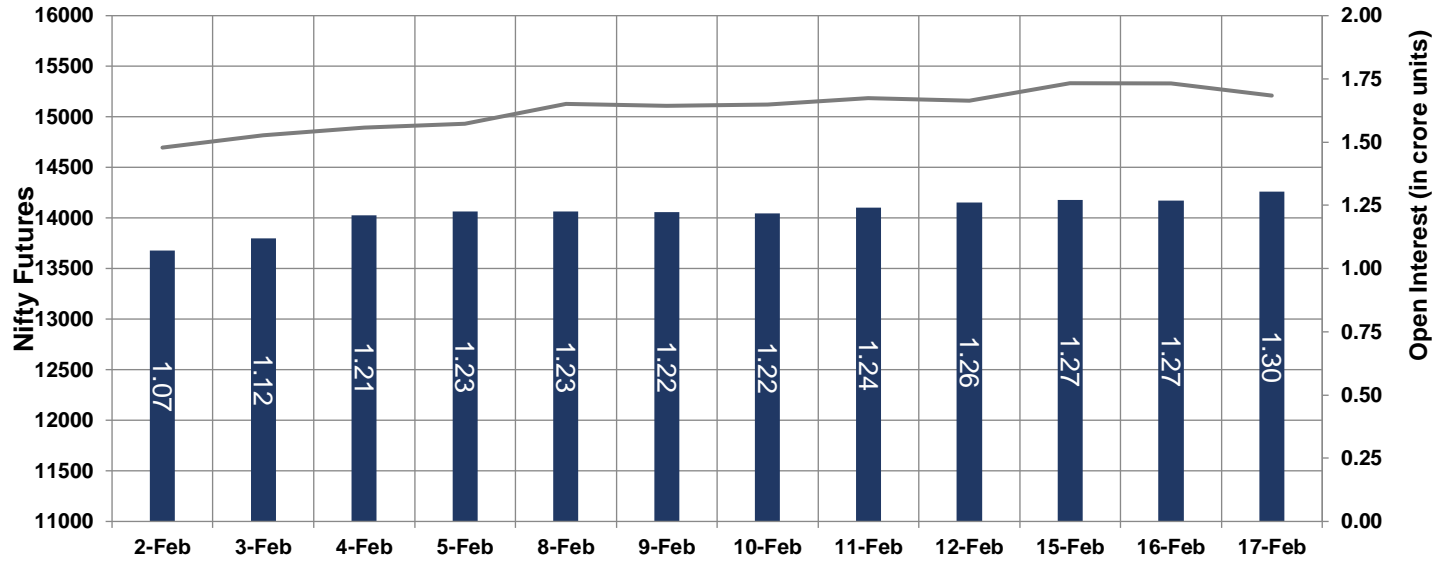
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	15209	15088	15148	14231	15292	15375	Neutral	Buy	Buy
SENSEX	51704	51298	51501	51789	51992	52281	Neutral	Buy	Buy
NIFTY FUTURES	15189	15067	15128	15226	15287	15385	Neutral	Buy	Buy
BANK NIFTY	36911	36435	36673	37002	37240	37569	Buy	Buy	Buy
CNX IT	25283	24959	25121	25397	25559	25834	Neutral	Buy	Buy
CNX MIDCAP	23388	23177	23283	23390	23495	23603	Buy	Buy	Buy
CNX SMALLCAP	7977	7912	7945	7983	8015	8053	Buy	Buy	Buy
INDIA VIX	21.50	20.71	21.11	21.49	21.89	22.28	Neutral	Neutral	Buy

## NIFTY TECHNICAL & INDICES LEVEL

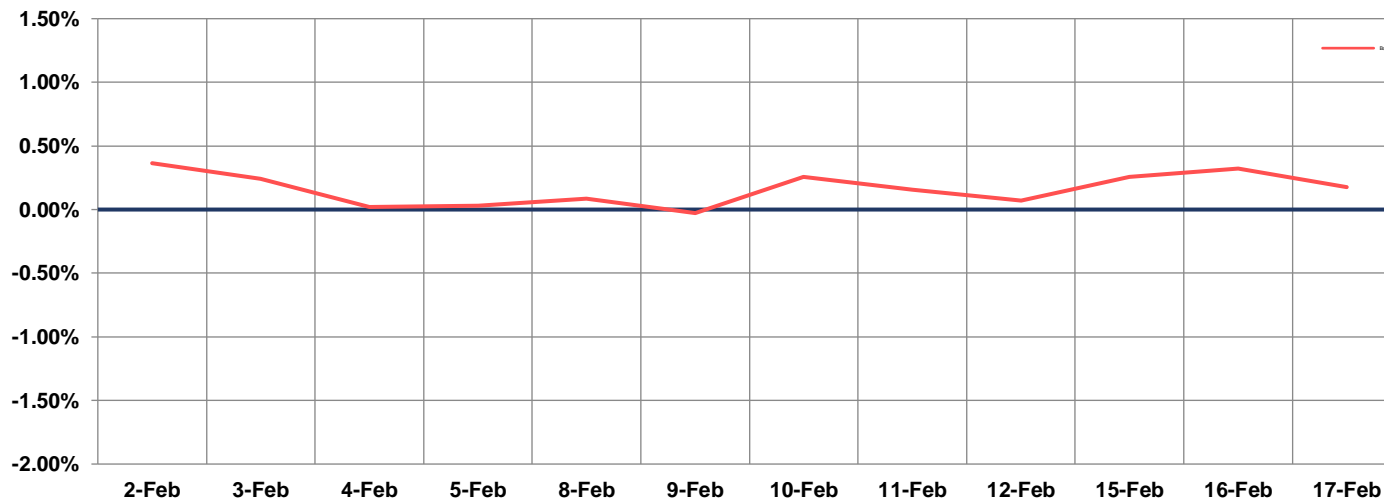
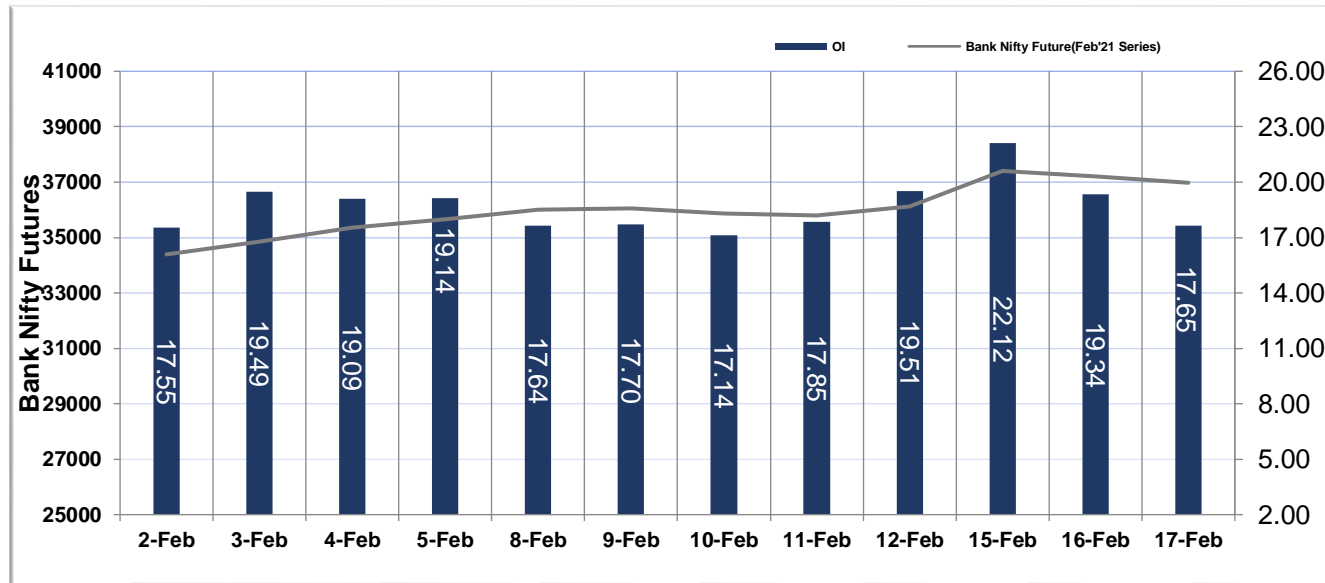


➤ Nifty Cash prices have settled at 15208.90 down by 0.68 percent from the previous close. On the upper side it has resistance of **15320** and **15470** levels, while lower side it has support of **15145** and **15010** levels. Intraday traders should be cautious and take position accordingly.

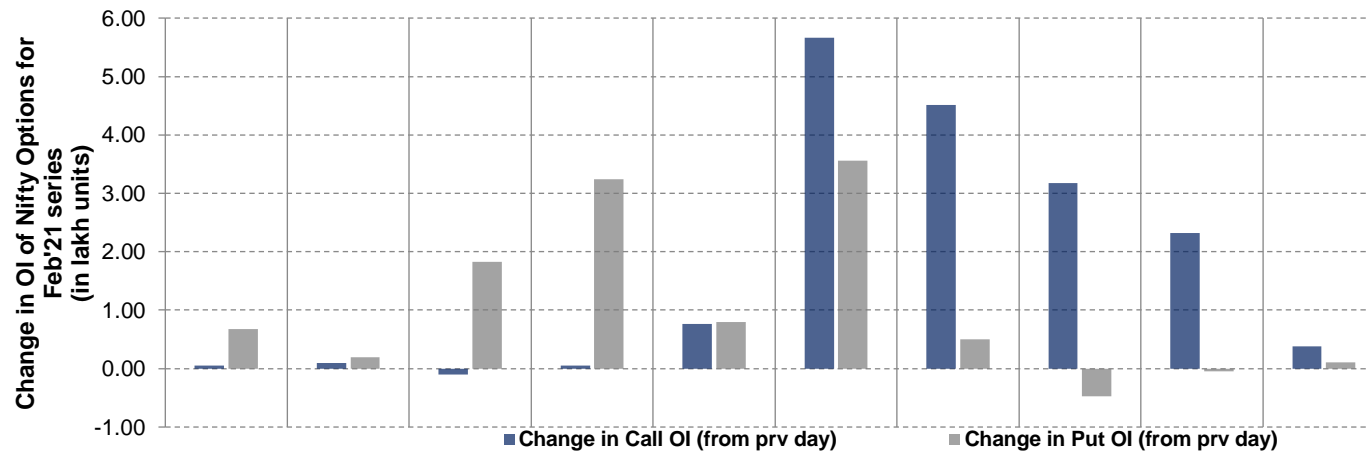
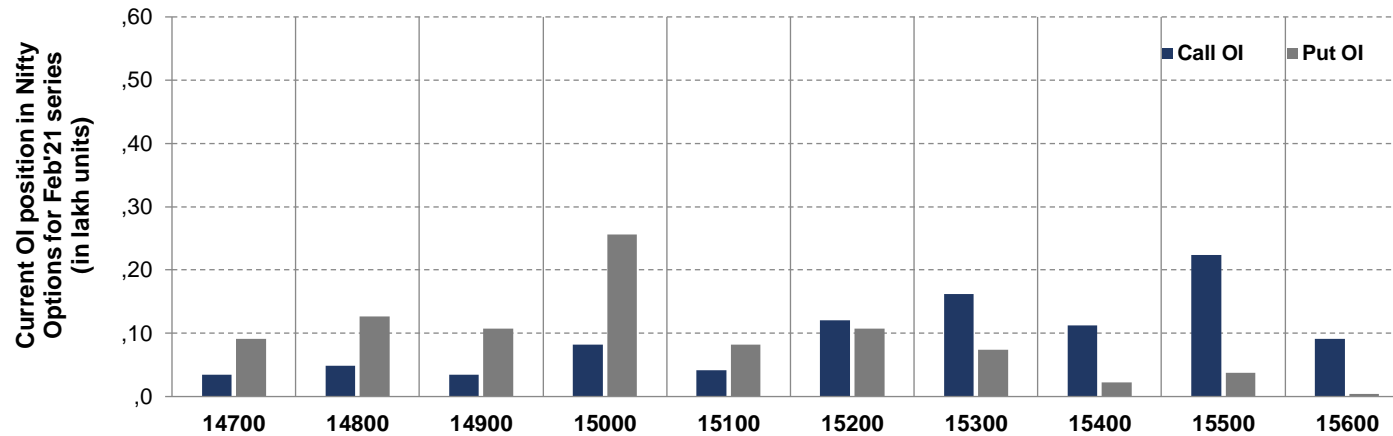
## NIFTY FUTURES



## 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 0.23 million in open interests.
- Among Nifty puts 15,000 SP from the Feb month expiry was the most active put with an addition of 0.32 million in open interests.
- The maximum OI outstanding for Calls was at 15,500 SP (2.24mn) and that for Puts was at 15,000 SP (2.60mn)



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