

# Morning Mantra

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

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## MARKET COMMENTARY

Indian equity benchmarks ended in red terrain on Thursday's trading session. After a cautious start of the trading day, key indices traded near their neutral lines, as Global forecasting firm Oxford Economics revised India's economic growth projection for 2021 to 10.2 per cent from the earlier 8.8 per cent, citing receding COVID-19 risks and the shift in the monetary policy outlook. It further said the Budget 2021-22 will create positive externalities for the private sector, and forecast slower fiscal consolidation in FY22 than the government projections.

Markets remained higher in morning deals, taking support with S&P Global Ratings' report stated that India will be one of the fastest growing emerging market economies with a 10 percent growth in FY22, and future sovereign rating action would hinge on lowering fiscal deficit and sustaining debt burden. It noted that the forecast for India in 2021 is on stronger side and shows that a lot of economic activity, which was frozen last year, is coming back on line to normalisation thereby brightening the growth prospects, as well as structural strengths of Indian economy coming back to the fore.

In late morning deals, markets turned negative as the government issued new guidelines for international arrivals amid the spread of mutant variants of coronavirus in many countries. The new Standard Operating Procedures (SOPs) will come into effect from 23.59 hours on February 22 till further orders. Traders overlooked reports that continuing efforts to improve the ease of doing business in the securities market, Sebi approved a slew of proposals, including relaxing minimum public offer requirements and amending norms for portfolio managers. Besides, the watchdog cleared repealing of Sebi (Underwriters) Regulations, 1993 and amendments to the Sebi (Merchant Bankers) Regulations, 1992 and the SEBI (Stock Brokers) Regulations, 1992.

On the global front, European markets were trading mostly in green as traders pored over pandemic-affected earnings updates from various sectors. Asian markets ended mostly lower on Thursday, even after South Korea's money supply growth rose in December. The figures from Bank of Korea showed that M2, a broad measure of money supply, increased 9.8 percent year-on-year in December, following a 9.7 percent increase in November. On a monthly basis, M2 money supply rose 0.4 percent in December, slower than 0.9 percent increase in the previous month. The annual growth in liquidity indicator L fell to 8.3 percent in December from 8.4 percent in the preceding month.

## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	51324.69	-379.14	-0.73
NIFTY	15118.95	-89.95	-0.59
MIDCAP	20375.64	139.01	0.69
SMLCAP	20016.43	133.14	0.67
BSEFMC	12301.89	-38.93	-0.32
AUTO	24429.66	-333.33	-1.35
POWER	2437.47	66.14	2.79
REALTY	2804.46	-18.45	-0.65
BSE IT	25468.29	127.64	0.50
BANKEX	41183.14	-488.37	-1.77
OIL GAS	15609.10	632.03	4.22
METAL	13080.03	164.20	1.27
INDIA VIX	21.54	0.04	0.16

## ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	1061	862	89
BSE	1641	1329	155

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	4717	4775	(1)
NSE CASH	81935	77145	6
NSE F&O	8021078	4317511	86

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	41.26	4.28	1.05
SENSEX	35.90	3.48	0.70

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

FII-DII*	Buy	Sell	Net
DII	5282	6499	(-1217)
FII	9726	8823	903

Note: FII & DII Figures are provisional

## FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	4137.30	4155.50	(18)
Index Options	807052.52	803484.00	3569
Stock Futures	18372.06	19567.37	(1195)
Stock Options	18334.36	18254.47	80

## PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.12	1.16
BANK NIFTY	0.87	0.97

## SECURITIES BAN FOR TRADE IN F&O FOR 19-02-2021

BHEL
CANBK
IDEA
SAIL

## 10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.135	6.030	1.74
USA	1.296	1.299	-0.26

## DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	90.95	90.68	-0.28

## CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
24-Feb-21 USD-INR	72.62	-0.18	-0.25
24-Feb-21 EUR-INR	87.71	-0.16	-0.18
24-Feb-21 GBP-INR	101.22	0.32	0.32
24-Feb-21 JPY- INR	68.75	0.02	0.03

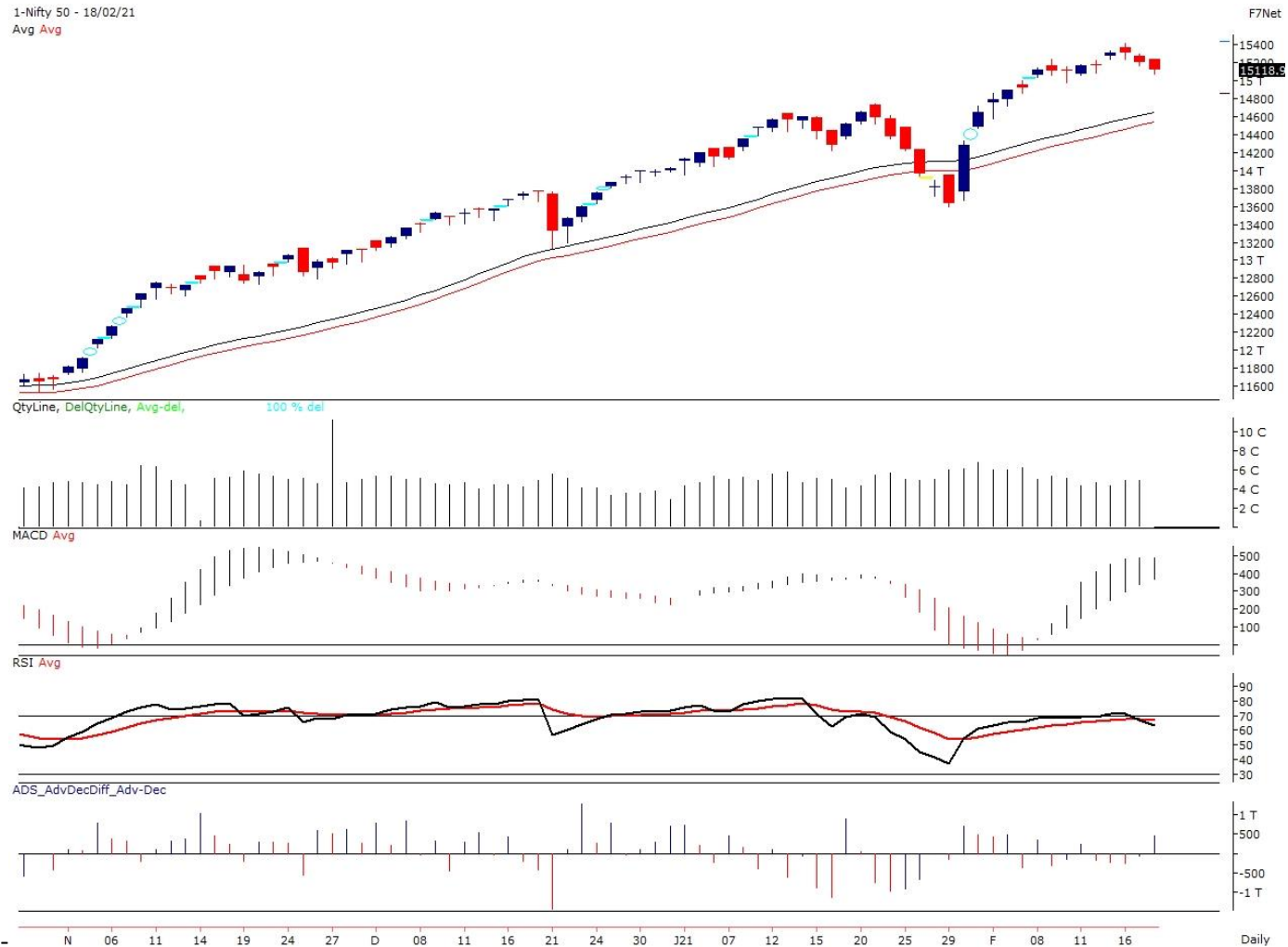
## KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1779.33	1.16	0.07
Silver	27.10	-0.30	-1.09
Crude-Oil	61.43	0.29	0.47
Brent-Crude	64.48	0.14	0.22

## INDEX TREND ANALYSIS

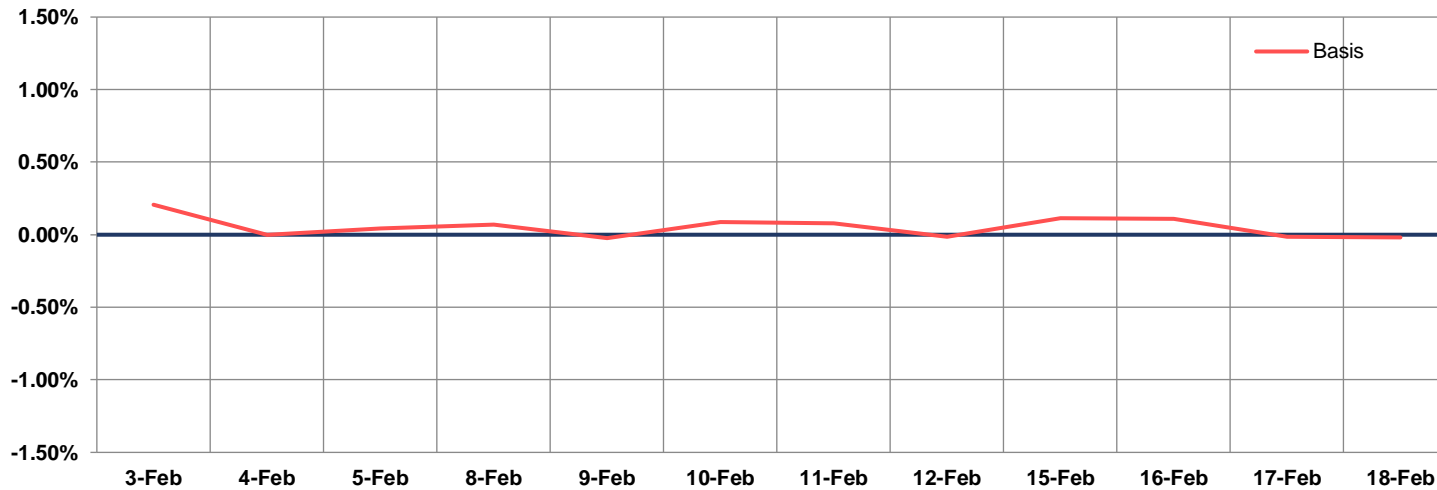
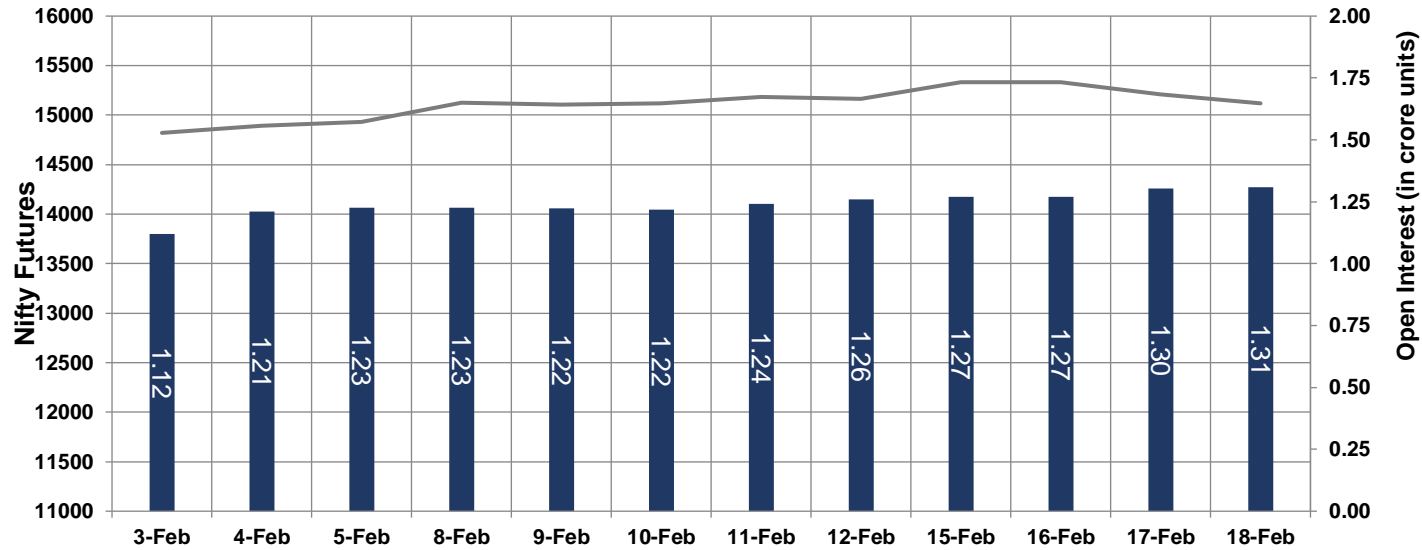
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	15119	14976	15048	15149	15220	15322	Neutral	Buy	Buy
SENSEX	51325	50754	51040	51472	51757	52189	Neutral	Buy	Buy
NIFTY FUTURES	15119	14956	15037	15146	15228	15337	Neutral	Buy	Buy
BANK NIFTY	36587	35946	36267	36688	37008	37429	Neutral	Buy	Buy
CNX IT	25618	25098	25358	25523	25783	25947	Neutral	Buy	Buy
CNX MIDCAP	23499	23296	23398	23519	23620	23741	Buy	Buy	Buy
CNX SMALLCAP	8054	7988	8021	8057	8090	8126	Buy	Buy	Buy
INDIA VIX	21.54	19.07	20.30	21.20	22.44	23.33	Sell	Neutral	Buy

## NIFTY TECHNICAL & INDICES LEVEL

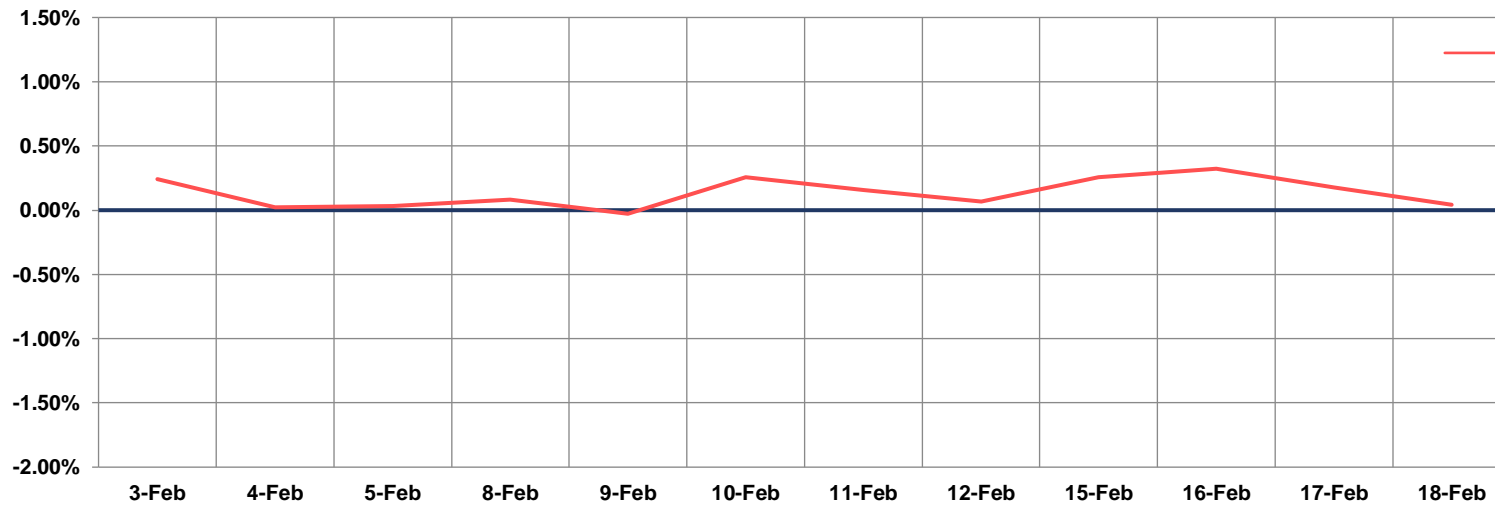
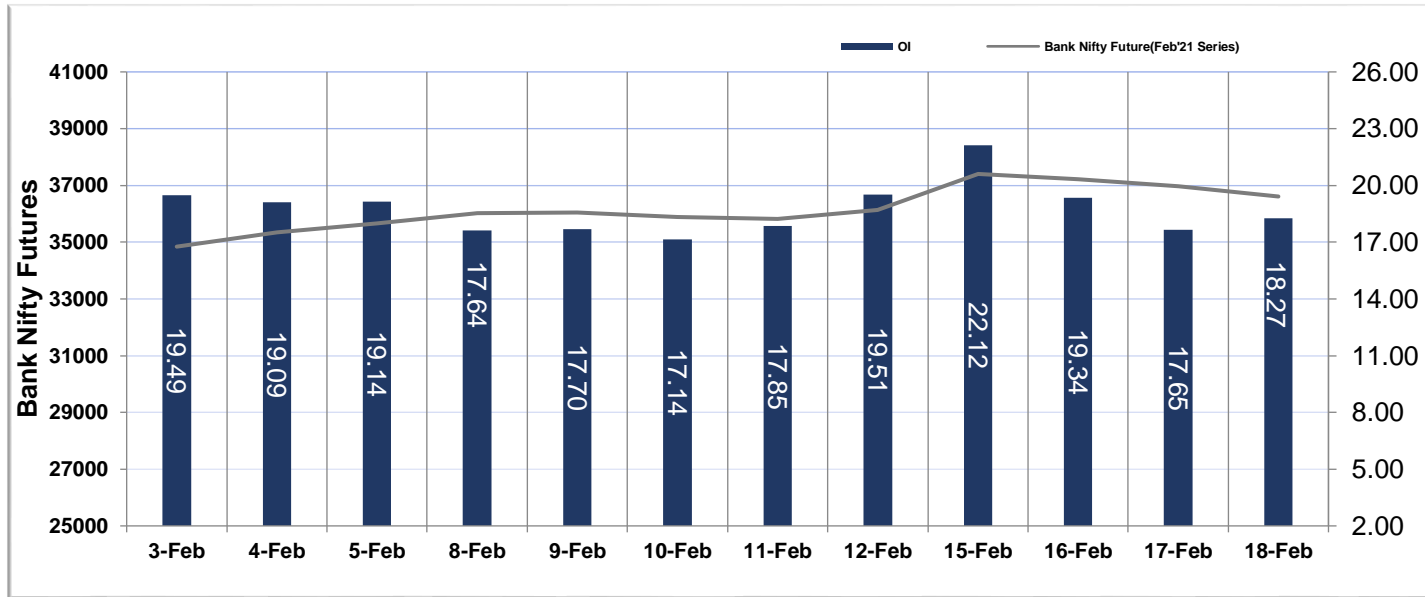


- Nifty Cash prices have settled at 15118.95 down by 0.59 percent from the previous close. On the upper side it has resistance of **15250** and **15320** levels, while lower side it has support of **15010** and **14953** levels. Intraday traders should be cautious and take position accordingly.

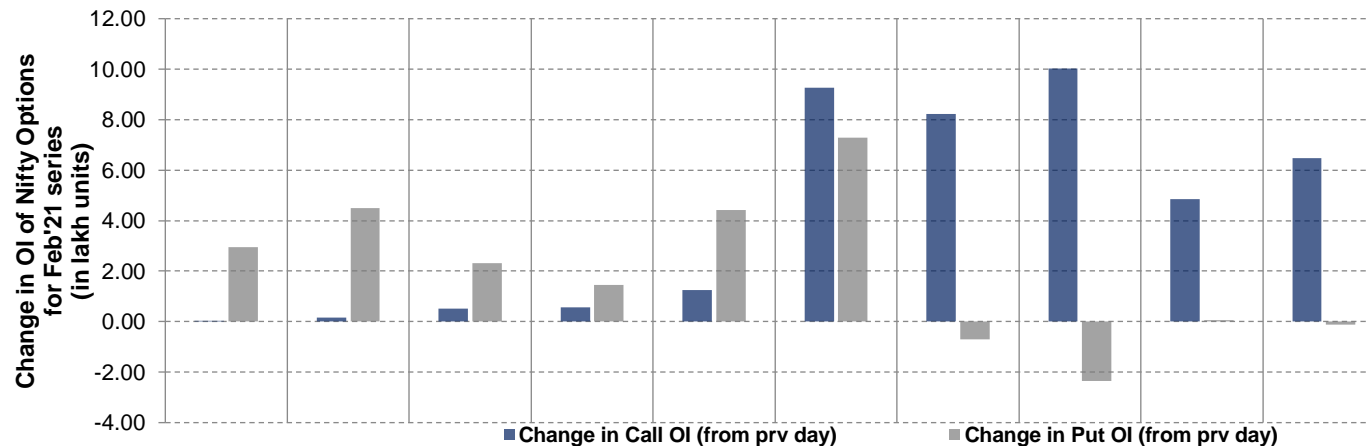
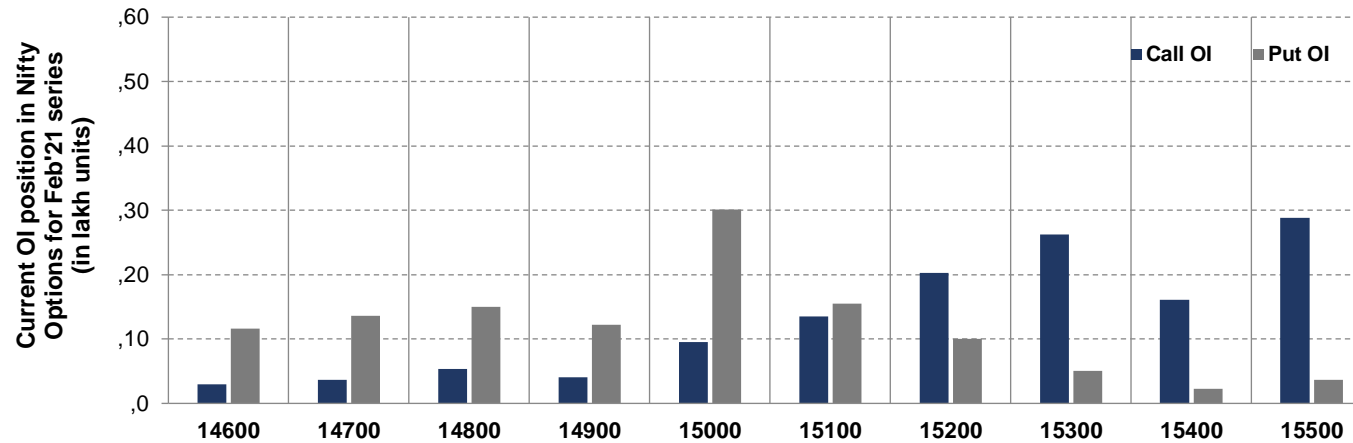
## NIFTY FUTURES



## 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 0.65 million in open interests.
- Among Nifty puts 15,000 SP from the Feb month expiry was the most active put with an addition of 0.44 million in open interests.
- The maximum OI outstanding for Calls was at 15,500 SP (2.90mn) and that for Puts was at 15,000 SP (3.01mn)



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