

Morning Mantra

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

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MARKET COMMENTARY

Indian equity benchmarks ended with notable losses on Friday. Markets made a negative start of the trading day, amid report that India registered 12,643 fresh Covid-19 cases. Active cases in India stand at 137,866, while the caseload tally has risen to 10,962,189. The country continues to be second-most-affected globally, and ranks 17th among worst-hit nations by active cases. Some concern came with report that PE/VC investments in January 2021 reported a 35 per cent drop to \$1.6 billion from \$2.5 billion, a year ago. The number of deals reported also remained flat at 80.

In the morning deals, key indices traded in green terrain for a little period, taking support with report that foreign portfolio investors (FPIs) have pumped in a whopping \$33.8 billion into domestic equities and debt till February 15 this fiscal year -- the highest since FY15 when it was nearly \$46 billion --taking their net outstanding investments to a record \$592.5 billion. Traders took a note of Finance Minister Nirmala Sitharaman's statement that India's inflation target band of 2-6 per cent is up for review as the five-year term for the Monetary Policy Committee's (MPC's) inflation-targeting framework draws to a close.

However, for the most part of the trading session, Indian markets remained lower and added more losses in the last hours of the trade, as domestic sentiments remained negative, amid reports that while the National Pension System (NPS) has a robust architecture, there are demand supply loopholes in the system and it also lacks flexibility, an essential component for the sector, as per findings of a discussion session held by NCAER. The National Council of Applied Economic Research (NCAER) held a workshop on investor education and protection with financial regulators, focussed on the NPS.

On the global front, European markets were trading higher despite rising bond yields. Asian markets ended mostly higher on Friday, even after Hong Kong's unemployment rate rose in January. The labor force statistics from the Census and Statistics Department showed that the unemployment rate rose to a seasonally adjusted 7.0 percent in three months to January from 6.6 percent in three months to December. The underemployment rate increased to 3.8 percent from 3.4 percent in the preceding period. The number of unemployed persons increased by around 7,500 to 253,300 in November to January. Over the same period, the number of underemployed persons also increased by around 14,400 to 148,200.

MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	50889.75	-434.93	-0.85
NIFTY	14981.75	-137.20	-0.91
MIDCAP	20035.52	-340.12	-1.67
SMLCAP	19863.41	-153.02	-0.76
BSEFMC	12283.06	-18.83	-0.15
AUTO	23795.80	-633.86	-2.59
POWER	2416.34	-21.13	-0.87
REALTY	2767.81	-36.65	-1.31
BSE IT	25444.21	-24.08	-0.09
BANKEX	40333.67	-849.47	-2.06
OIL GAS	15433.88	-175.22	-1.12
METAL	12806.51	-273.52	-2.09
INDIA VIX	22.25	0.71	3.28

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	645	1283	77
BSE	1119	1839	173

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	5671	4717	20
NSE CASH	84174	81935	3
NSE F&O	2755177	8021078	(66)

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	40.88	4.24	1.06
SENSEX	35.64	3.45	0.70

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	3542	4717	(1175)
FII	8611	8492	119

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	5942.45	5661.27	281
Index Options	363449.64	359466.09	3984
Stock Futures	23154.62	22835.28	319
Stock Options	23683.83	23471.56	212

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.19	1.12
BANK NIFTY	0.76	0.87

SECURITIES BAN FOR TRADE IN F&O FOR 22-02-2021

BHEL
CANBK
IDEA
SAIL

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.132	6.135	-
USA	1.306	1.287	1.47

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	90.34	90.59	-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

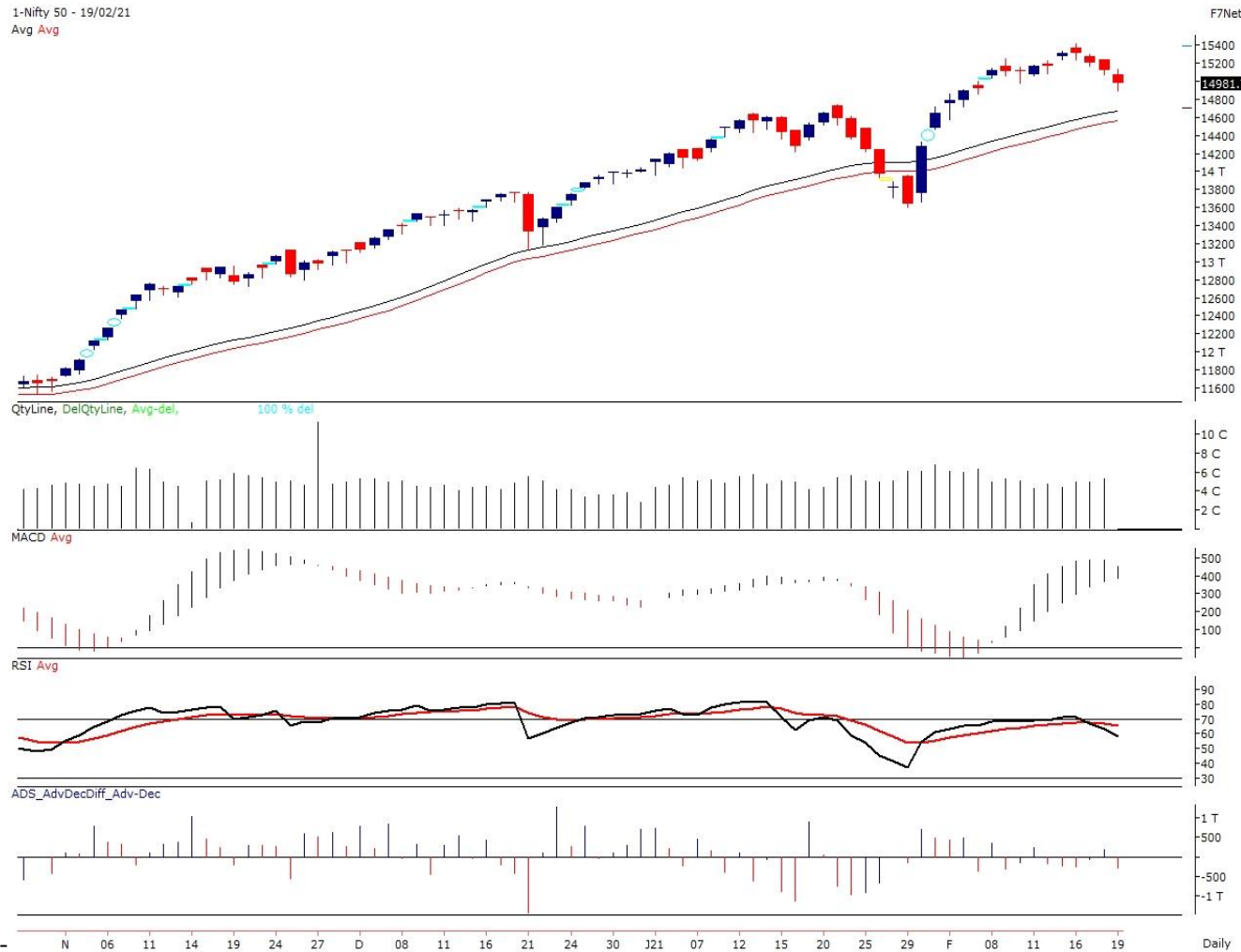
KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1783.40	11.76	0.66
Silver	27.22	0.66	2.50
Crude-Oil	59.26	-1.27	-2.10
Brent-Crude	62.84	-1.09	-1.70

INDEX TREND ANALYSIS

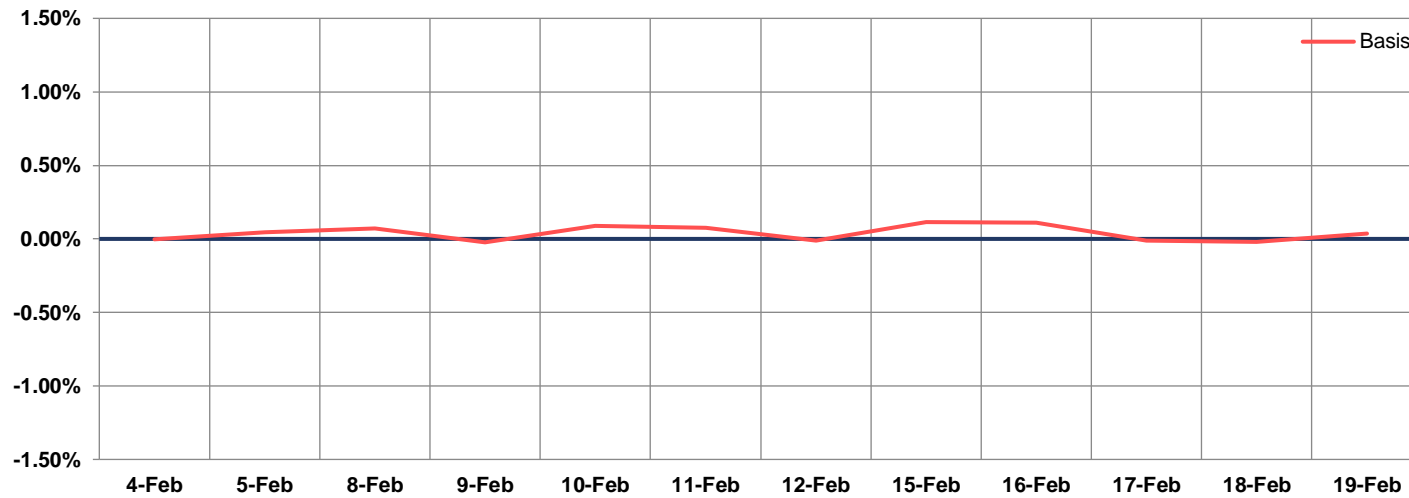
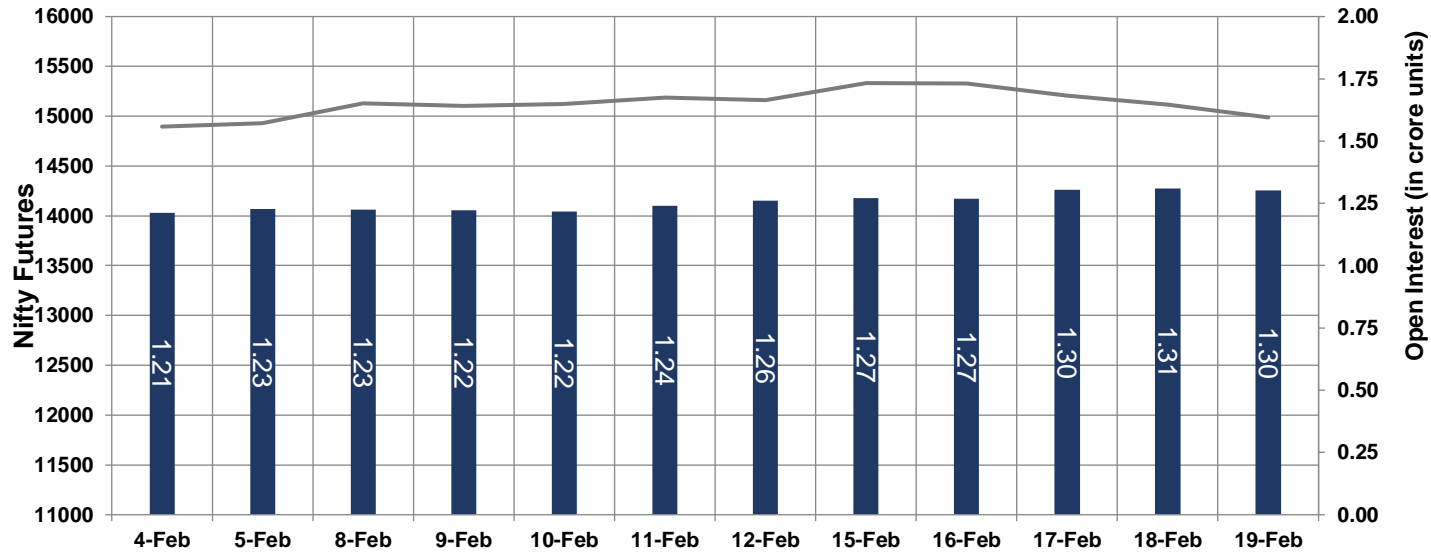
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	14982	14762	14872	15008	15118	15254	Neutral	Buy	Buy
SENSEX	50890	50174	50532	50982	51340	51791	Neutral	Buy	Buy
NIFTY FUTURES	15007	14772	14890	15017	15134	15262	Neutral	Buy	Buy
BANK NIFTY	35842	34956	35399	36027	36470	37099	Neutral	Buy	Buy
CNX IT	25503	25107	25305	25491	25688	25874	Neutral	Neutral	Buy
CNX MIDCAP	23119	22498	22805	23180	23490	23862	Neutral	Buy	Buy
CNX SMALLCAP	7980	7797	7889	8001	8092	8205	Buy	Buy	Buy
INDIA VIX	22.25	17.96	20.10	21.49	23.63	25.02	Neutral	Neutral	Buy

NIFTY TECHNICAL & INDICES LEVEL

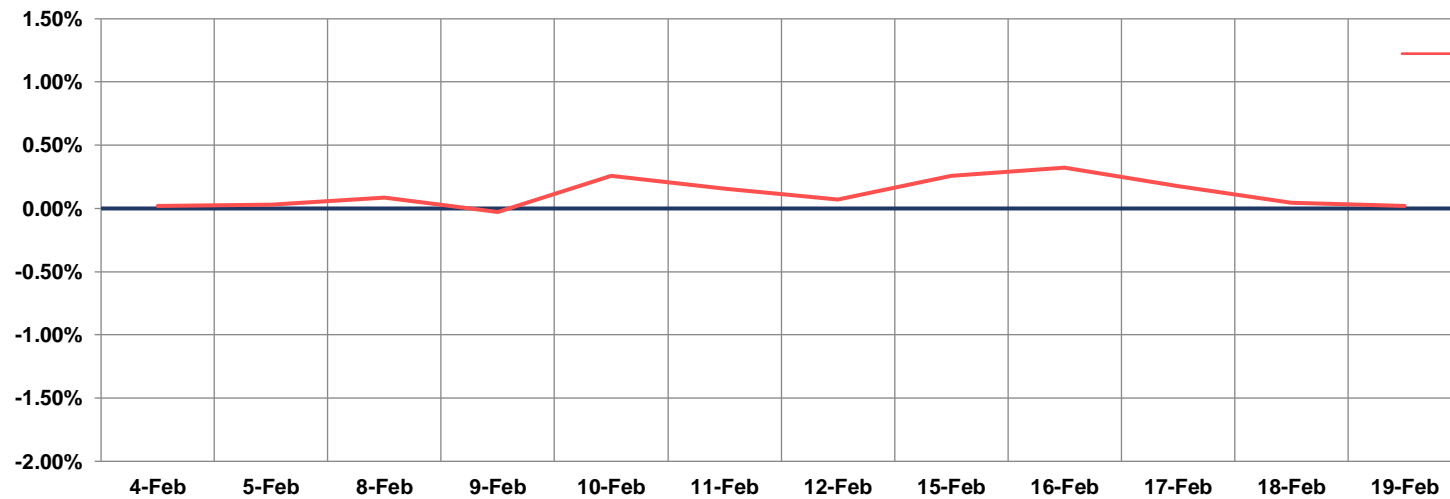
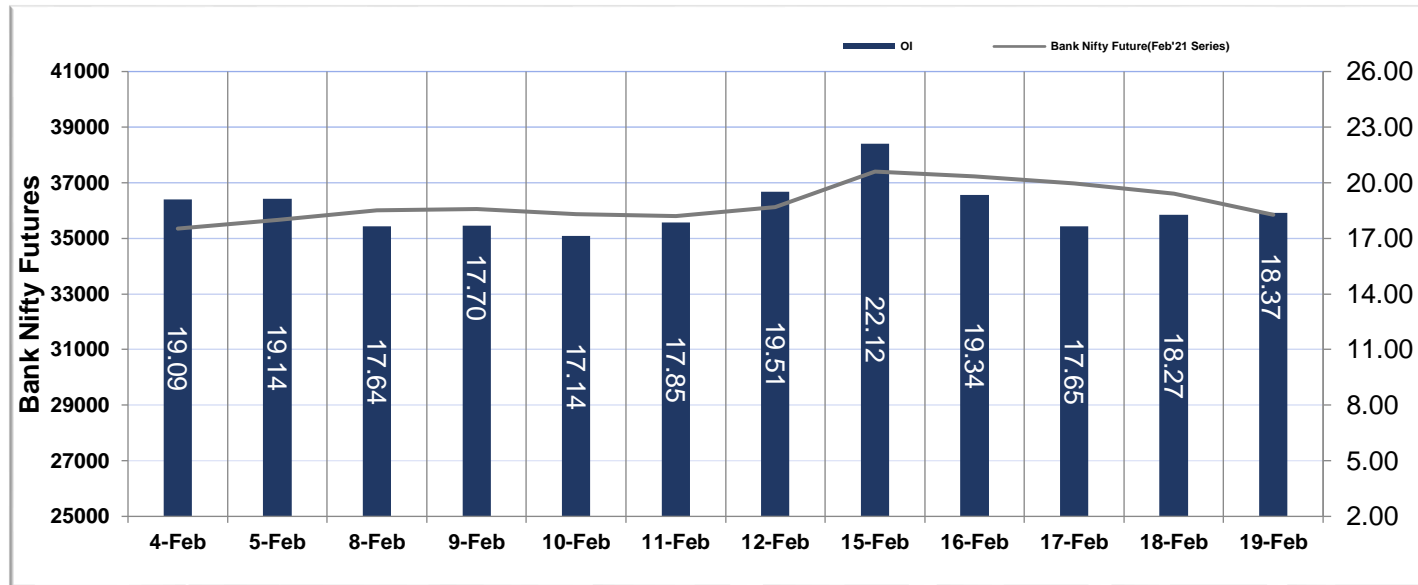


➤ Nifty Cash prices have settled at 14981.75 down by 0.91 percent from the previous close. On the upper side it has resistance of **15040** and **15180** levels, while lower side it has support of **14880** and **14750** levels. Intraday traders should be cautious and take position accordingly.

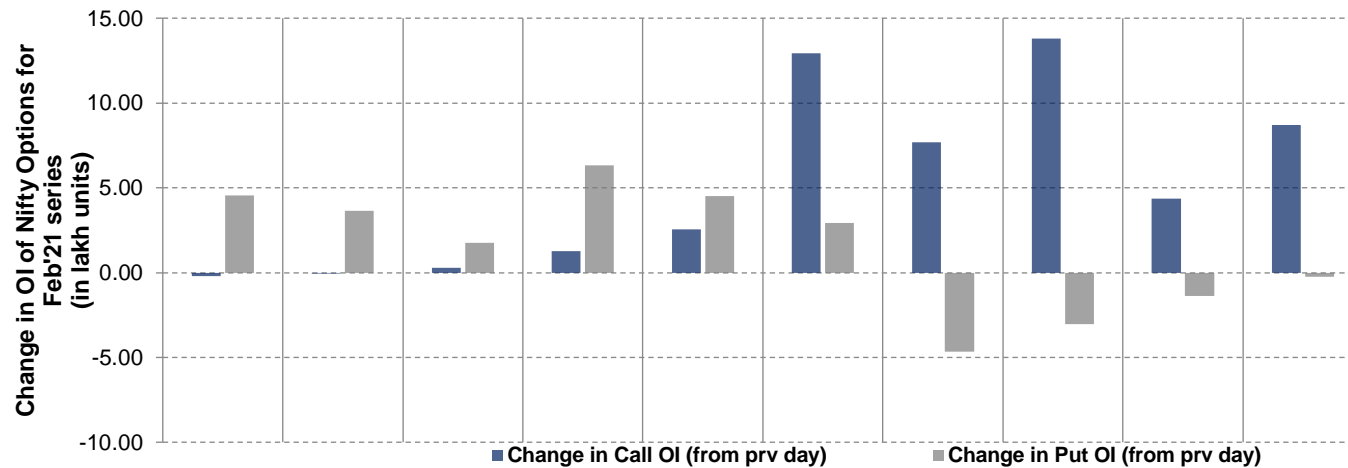
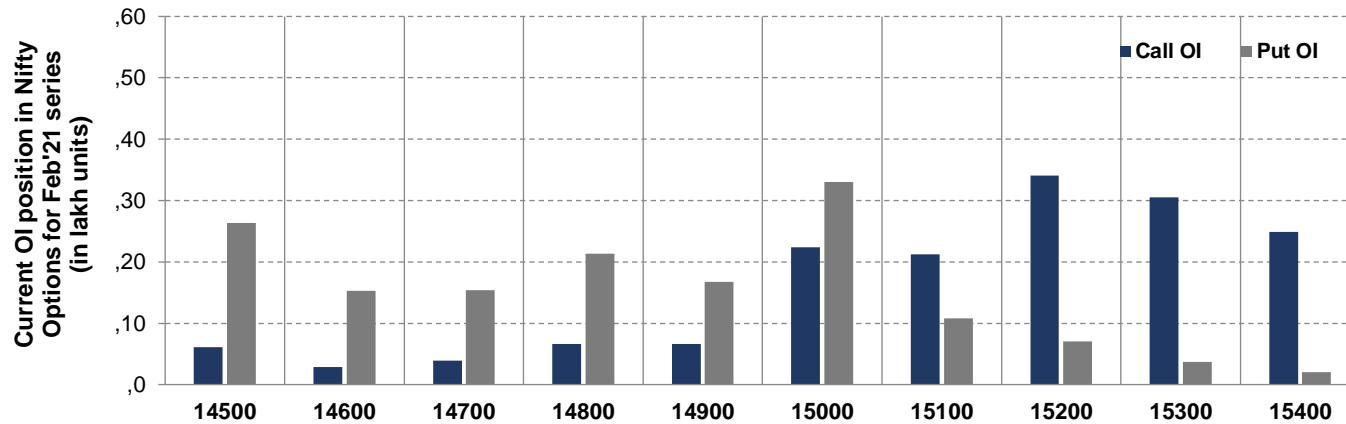
NIFTY FUTURES



BANK NIFTY FUTURES



NIFTY OPTIONS



- Among Nifty calls 15,200 SP from the Feb month expiry was the most active call with an addition of 1.40 million in open interests.
- Among Nifty puts 15,000 SP from the Feb month expiry was the most active put with an addition of 0.30 million in open interests.
- The maximum OI outstanding for Calls was at 15,200 SP (3.41mn) and that for Puts was at 15,000 SP (3.30mn)

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