

Morning Mantra

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

ISO 9001 : 2015 Certified



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MARKET COMMENTARY

Indian equity benchmarks ended with strong gains on Wednesday. Indices made a positive start of the day, amid a private report that India's GDP may turn positive at 1.3 percent in the third quarter of 2020-21, having witnessed contraction in the previous two quarters due to the coronavirus pandemic, as the number of cases is falling and public spending has started rising. Some support also came in as Agriculture Minister Narendra Singh Tomar said that the government's decision to increase the agriculture credit target to Rs 16.5 lakh crore for the next fiscal will help in easing the liquidity crunch of farmers.

After one hour of trade, trading had been halted on NSE due to a technical glitch, while trading on the BSE was functioning normally. Sensex remained higher during the session, taking support with Union Minister Sadananda Gowda's statement that the chemicals and petrochemicals sector has huge potential and can contribute significantly towards achieving the government's target of \$5 trillion economy. He also said India has potential to become a global petrochemical hub & factors like high GDP growth, presence of skilled manpower, big domestic market makes India an attractive platform for investment in the sector.

In late afternoon deals, the National Stock Exchange re-opened and the NSE and the BSE remained opened till 5:00 pm. Traders took a note of Niti Aayog CEO Amitabh Kant's statement that India now needs to get into cutting edge technology in order to boost its exports which will benefit sectors such as telecom, automobiles, battery storage devices, and solar energy, among others. The street also took note of report that India and Mauritius have signed a free trade agreement, under which over 300 domestic goods from agriculture, textiles, electronics and other sectors will get market access at concessional customs duties in the African nation.

On the global front, European markets were trading mostly in green as markets digest remarks from U.S. Federal Reserve Chair Jerome Powell and promising German data. Asian markets ended lower on Wednesday, after Malaysia's consumer prices declined at a softer pace in January. The data from the Department of Statistics showed that the consumer price index declined 0.2 percent year-on-year in January, following a 1.4 percent fall in December. The annual fall was largely driven by the decline in transportation cost, as prices fell 5.1 percent.

MARKET SUMMARY

| Domestic Indices | Close | Points | % Change |
|------------------|----------|---------|----------|
| SENSEX | 50689.92 | 938.51 | 1.89 |
| NIFTY | 14982.00 | 274.20 | 1.86 |
| MIDCAP | 20107.69 | 147.11 | 0.74 |
| SMLCAP | 20024.99 | 218.54 | 1.10 |
| BSEFMC | 12182.89 | 50.78 | 0.42 |
| AUTO | 23469.87 | 55.68 | 0.24 |
| POWER | 2404.00 | -3.11 | -0.13 |
| REALTY | 2788.93 | 23.17 | 0.84 |
| BSE IT | 24857.96 | 18.24 | 0.07 |
| BANEX | 40832.14 | 1335.78 | 3.38 |
| OIL GAS | 15597.96 | 113.66 | 0.73 |
| METAL | 13571.02 | -8.00 | -0.06 |
| INDIA VIX | 24.17 | -1.06 | -4.20 |

ADVANCE-DECLINE

| Index | Advance | Decline | Unchanged |
|-------|---------|---------|-----------|
| NSE | 1200 | 634 | 87 |
| BSE | 1863 | 1068 | 168 |

MARKET TURNOVER (₹ in Crs)

| Segment | Current | Previous | Net % |
|----------|---------|----------|-------|
| BSE CASH | 40698 | 4521 | 800 |
| NSE CASH | 45837 | 75979 | (40) |
| NSE F&O | 3059749 | 4032054 | (24) |

KEY INDICES RATIOS

| INDEX | P/E | P/B | Dividend Yield |
|--------|-------|------|----------------|
| NIFTY | 40.88 | 4.24 | 1.06 |
| SENSEX | 35.46 | 3.43 | 0.72 |

FII & DII - CAPITAL MARKETS (₹ in Crs)

| FII-DII* | Buy | Sell | Net |
|----------|-------|------|-------|
| DII | 3574 | 3343 | 230 |
| FII | 35296 | 6556 | 28739 |

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

| FII | Buy | Sell | Net |
|---------------|-----------|-----------|--------|
| Index Futures | 6551.45 | 6108.23 | 443 |
| Index Options | 290922.47 | 292628.53 | (1706) |
| Stock Futures | 21262.09 | 21583.68 | (322) |
| Stock Options | 8629.27 | 8483.38 | 146 |

PUT-CALL RATIO

| Index | Current | Previous |
|------------|---------|----------|
| NIFTY | 1.28 | 1.08 |
| BANK NIFTY | 1.15 | 0.75 |

SECURITIES BAN FOR TRADE IN F&O FOR 25-02-2021

| |
|-------------|
| Not updated |
|-------------|

10-YEAR GOVERNMENT SECURITIES YIELD

| Country | Current | Previous | % Chg |
|---------|---------|----------|-------|
| INDIA | 6.147 | 6.172 | 0.00 |
| USA | 1.369 | 1.364 | 0.35 |

DOLLAR INDEX

| Dollar Index | Current | Previous | % Chg |
|--------------|---------|----------|-------|
| DXY | 90.12 | 90.18 | -0.06 |

CURRENCY FUTURES

| Expiry | Close | Chg Point | % Chg |
|--------------------|--------|-----------|-------|
| 24-Feb-21 USD-INR | 72.64 | -0.20 | -0.28 |
| 24-Feb-21 EUR-INR | 88.34 | -0.12 | -0.14 |
| 24-Feb-21 GBP-INR | 102.49 | 0.13 | 0.13 |
| 24-Feb-21 JPY- INR | 68.69 | -0.48 | -0.70 |

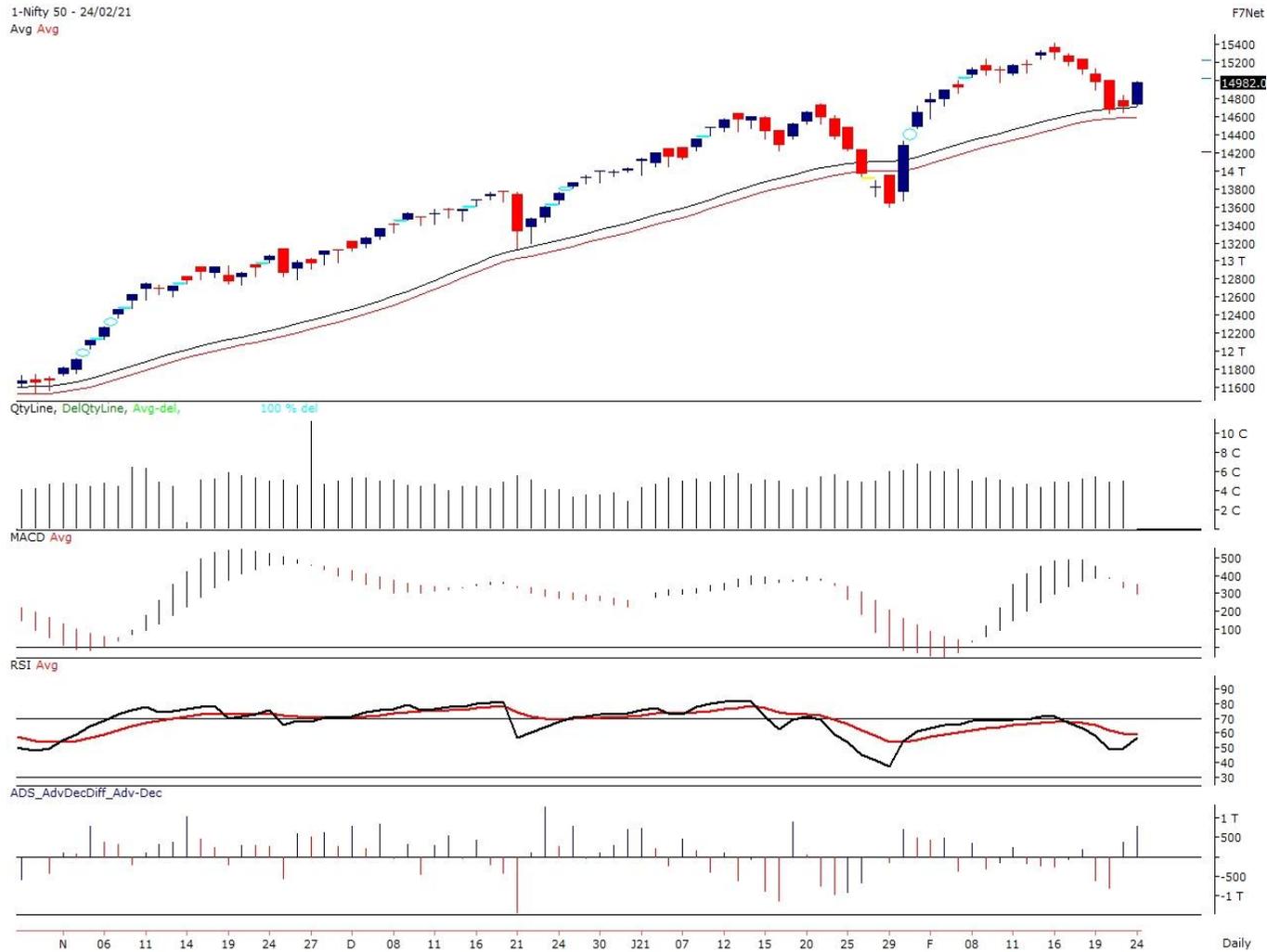
KEY COMMODITIES TRACKER

| Commodity | Current | Chg Point | % Chg |
|-------------|---------|-----------|-------|
| Gold | 1797.60 | -5.39 | -0.30 |
| Silver | 27.94 | 0.02 | 0.08 |
| Crude-Oil | 63.32 | 0.10 | 0.16 |
| Brent-Crude | 67.13 | 0.09 | 0.13 |

INDEX TREND ANALYSIS

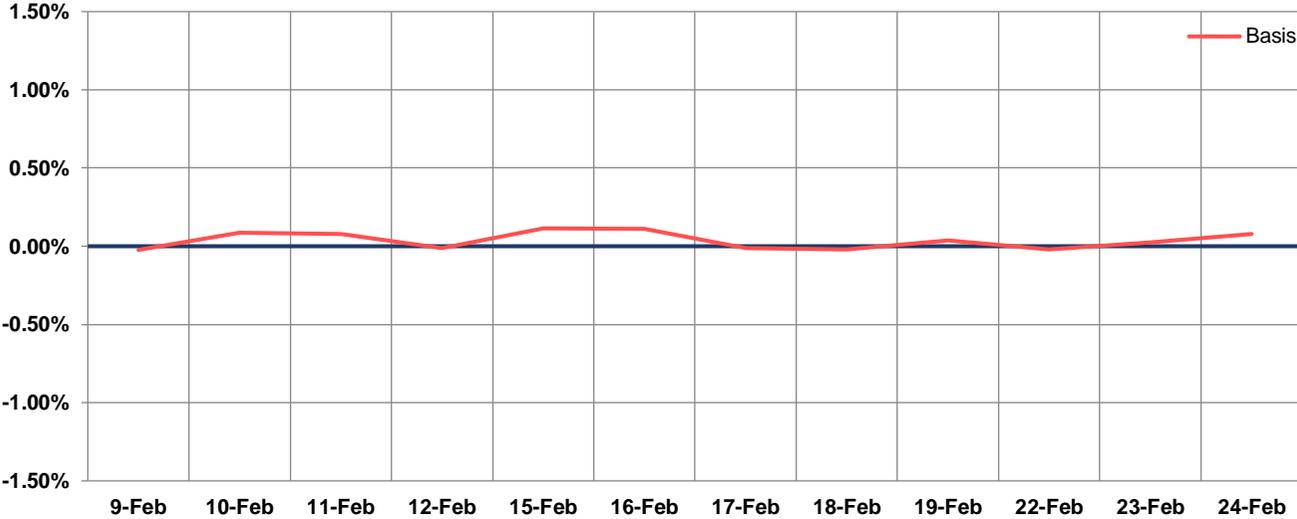
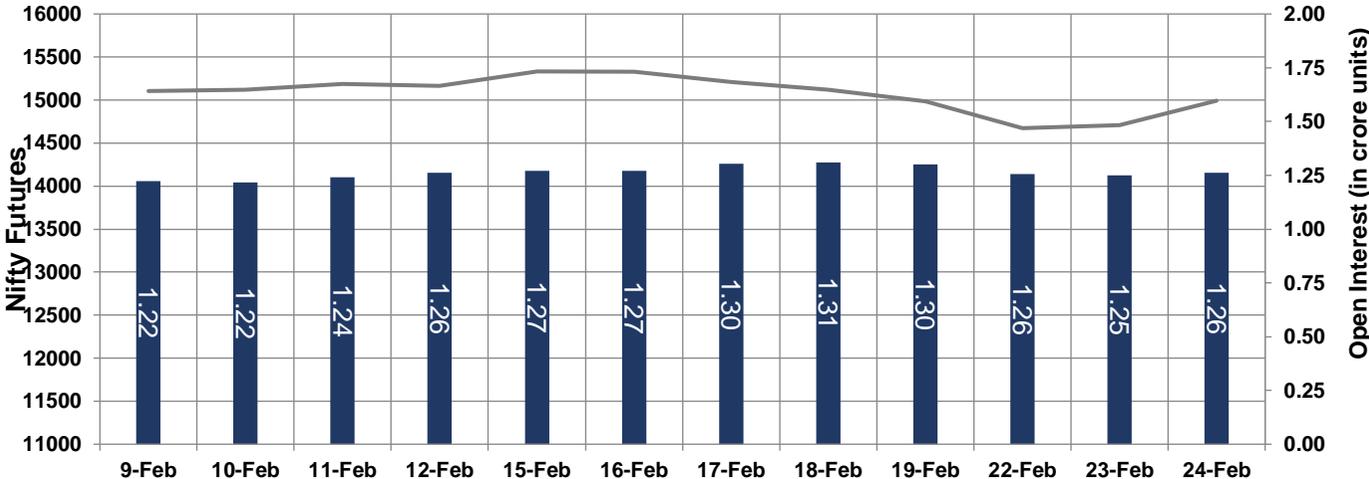
| INDEX | CLOSE | S2 | S1 | PIVOT | R1 | R2 | DAILY | WEEKLY | MONTHLY |
|---------------|-------|-------|-------|-------|-------|-------|-------|---------|---------|
| NIFTY | 14982 | 14619 | 14800 | 14905 | 15086 | 15190 | Buy | Buy | Buy |
| SENSEX | 50777 | 49203 | 49990 | 50436 | 51222 | 51668 | Buy | Buy | Buy |
| NIFTY FUTURES | 15000 | 14270 | 14635 | 15079 | 15445 | 15889 | Buy | Buy | Buy |
| BANK NIFTY | 36452 | 34520 | 35486 | 36027 | 36993 | 37554 | Buy | Buy | Buy |
| CNX IT | 24779 | 24370 | 24575 | 24723 | 24929 | 25077 | Sell | Neutral | Buy |
| CNX MIDCAP | 23291 | 22941 | 23116 | 23223 | 23398 | 23505 | Buy | Buy | Buy |
| CNX SMALLCAP | 8034 | 7946 | 7990 | 8023 | 8067 | 8100 | Buy | Buy | Buy |
| INDIA VIX | 24.17 | 22.30 | 23.24 | 24.38 | 25.31 | 26.46 | Buy | Neutral | Buy |

NIFTY TECHNICAL & INDICES LEVEL

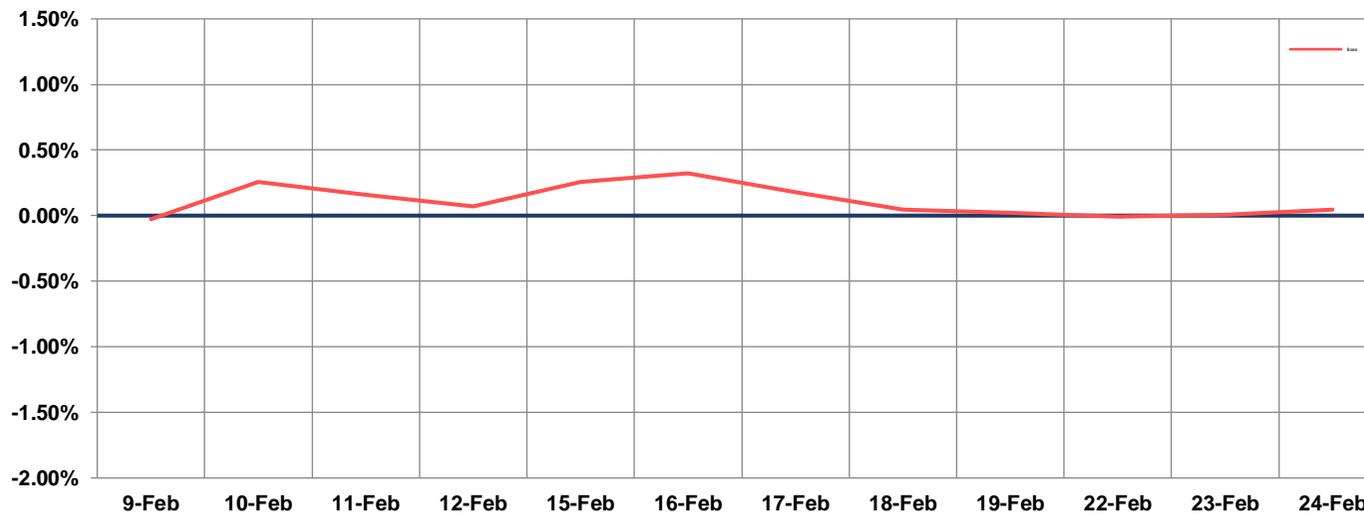
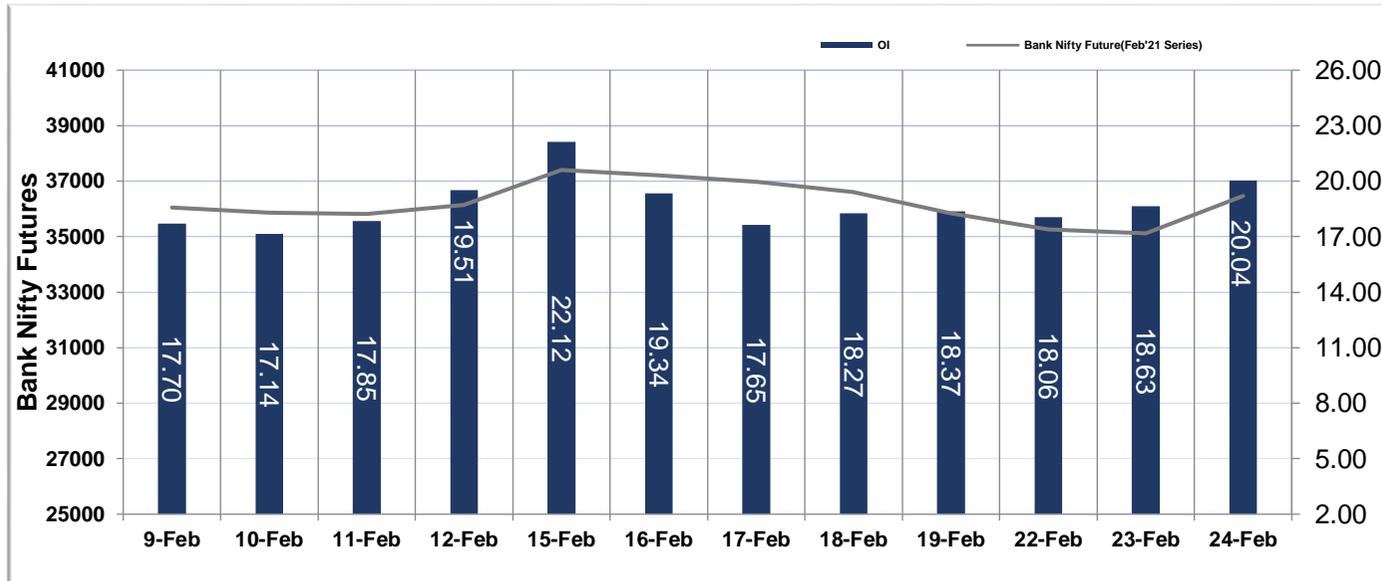


➤ Nifty Cash prices have settled at 14982.00 up by 1.86 percent from the previous close. On the upper side it has resistance of **15170** and **15255** levels, while lower side it has support of **14840** and **14770** levels. Intraday traders should be cautious and take position accordingly.

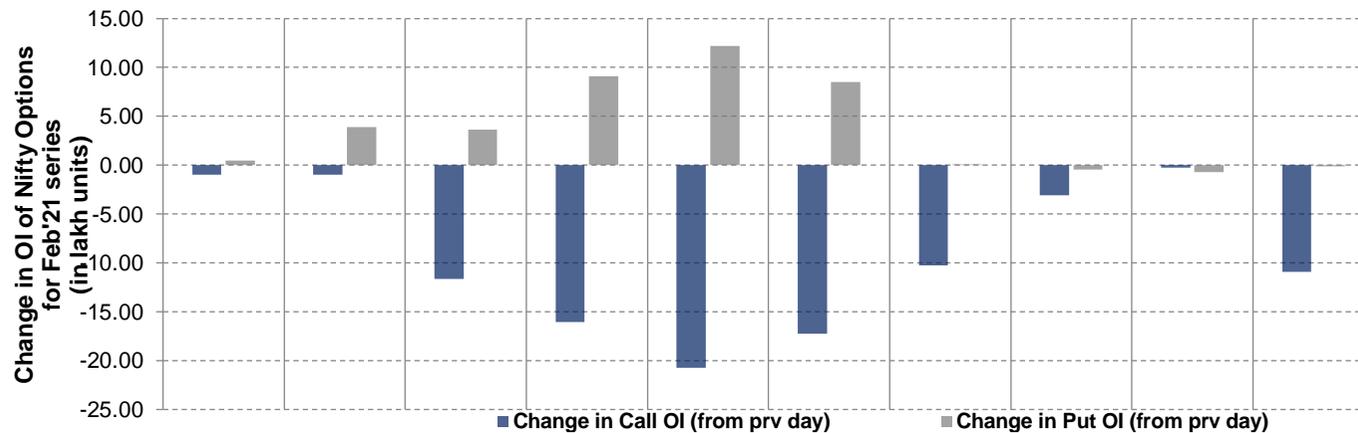
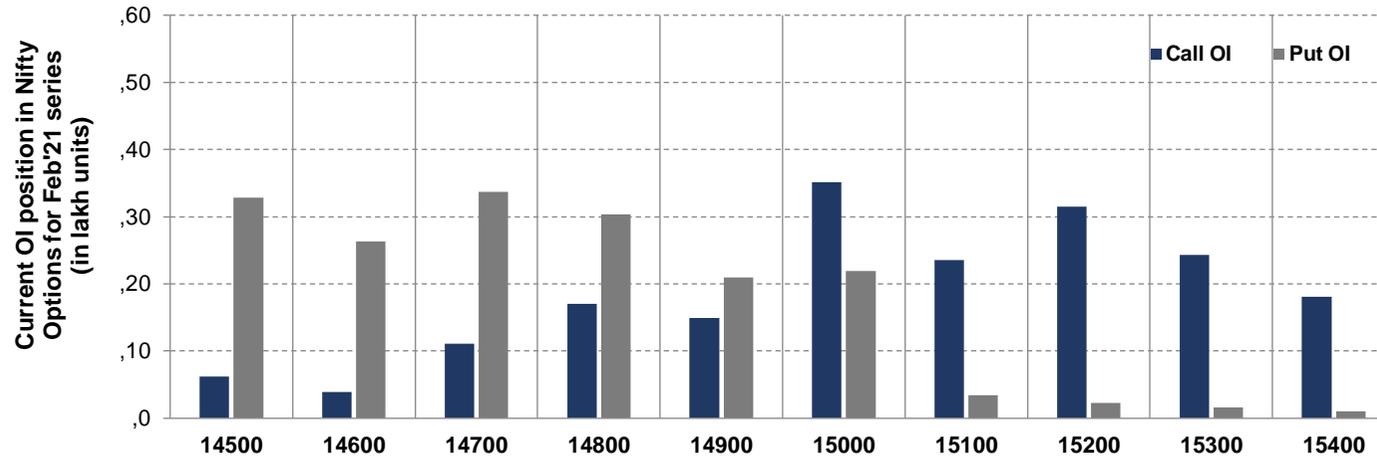
NIFTY FUTURES



BANK NIFTY FUTURES



NIFTY OPTIONS



- Among Nifty calls 15,000 SP from the Feb month expiry was the most active call with a reduction of 1.72 million in open interests.
- Among Nifty puts 14,700 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 15,000 SP (3.51mn) and that for Puts was at 14,700 SP (3.40mn)

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