

Morning Mantra

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

ISO 9001 : 2015 Certified



Table of Contents

Page No.	Particulars
1	Market Commentary
2	Market Summary and Numbers that matter
3	G-Sec Yields, Currency Futures, Dollar Index, Key Commodities Tracker & Index Trend Analysis
4	Nifty Technical
5	Nifty Futures
6	Bank Nifty Futures
7	Nifty Options
8	Disclaimer

MARKET COMMENTARY

Indian equity benchmarks ended higher on Thursday. The start of the day was on a strong note, as the Central government has lifted the embargo placed granting businesses to private banks, which is expected to enhance customer convenience, spur competition and higher efficiency in standards of customer services. In a statement, the Department of Financial Services (DFS) said that 'The Government has lifted the embargo on private banks (only a few were permitted earlier) for the conduct of Government-related banking transactions such as taxes and other revenue payment facilities, pension payments, small savings schemes, etc.'

Indices remained higher for the whole trading day, after the Reserve Bank of India (RBI) announced yet another round of Open Market Operations (OMO) or simultaneous purchase and sale of gilts on March 4. Under this, the RBI will buy Rs 15,000 crore worth bonds in four different papers and sell Rs 150,000 crore worth bonds in two different securities. Traders remained positive, as Moody's projected India's growth for the next financial year beginning April 1, to 13.7 percent, from 10.8 percent estimated earlier, on the back of normalisation of activity and growing confidence in the market with the rollout of COVID-19 vaccine.

In the last hour of the trading session, markets cut some of their gains but managed to end higher. Sentiments remained up-beat with S&P Global Ratings' statement that an improvement in macroeconomic conditions is likely to alleviate stress for India's banking sector. It said the Indian government's strong efforts to shield banks from the COVID-19 pandemic have largely been successful, but a hit from the pandemic is inevitable. Traders took a note of private report stated that the number of ultra-high networth individuals (UHNWIs), with wealth of \$30 million or more, is expected to rise 63 percent over the next five years to 11,198 in India, the second fastest growth in the world.

On the global front, European markets were trading higher following Asian and U.S. stocks up, as hopes of an economic recovery and positive results fuel investors' optimism. Asian markets ended higher on Thursday, even after Malaysia's producer prices declined at a softer rate in January. The figures from the Department of Statistics showed that the producer price index fell 0.1 percent year-on-year in January, following a 2.1 percent decrease in December. Among sectors, prices of mining declined the most by 28.3 percent annually in January and prices for electricity and gas supply fell 1.9 percent.

MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	51039.31	257.62	0.51
NIFTY	15097.35	115.35	0.77
MIDCAP	20333.80	219.95	1.09
SMLCAP	20304.98	285.01	1.42
BSEFMC	12153.76	-28.63	-0.24
AUTO	23670.80	170.07	0.72
POWER	2448.21	42.94	1.79
REALTY	2838.38	45.15	1.62
BSE IT	24988.82	117.18	0.47
BANDEX	40977.00	17.76	0.04
OIL GAS	16144.31	548.30	3.52
METAL	14096.11	460.23	3.38
INDIA VIX	22.89	-1.28	-5.29

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	1257	673	84
BSE	1782	1171	175

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	7480	40698	(82)
NSE CASH	84444	45837	84
NSE F&O	8615815	3059749	182

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	41.20	4.28	1.05
SENSEX	35.60	3.45	0.70

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	5175	5921	(747)
FII	14124	13936	188

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	10677.46	10295.47	382
Index Options	917824.69	909360.24	8464
Stock Futures	30498.39	32153.15	(1655)
Stock Options	11832.42	11076.90	756

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.28	1.28
BANK NIFTY	0.96	1.15

SECURITIES BAN FOR TRADE IN F&O FOR 26-02-2021

NIL

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.184	6.147	0.60
USA	1.449	1.389	4.34

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	89.80	90.17	-0.41

CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
26-Mar-21 USD-INR	72.74	0.11	0.15
26-Mar-21 EUR-INR	88.94	0.62	0.70
26-Mar-21 GBP-INR	102.82	0.27	0.26
26-Mar-21 JPY- INR	68.59	-0.06	-0.09

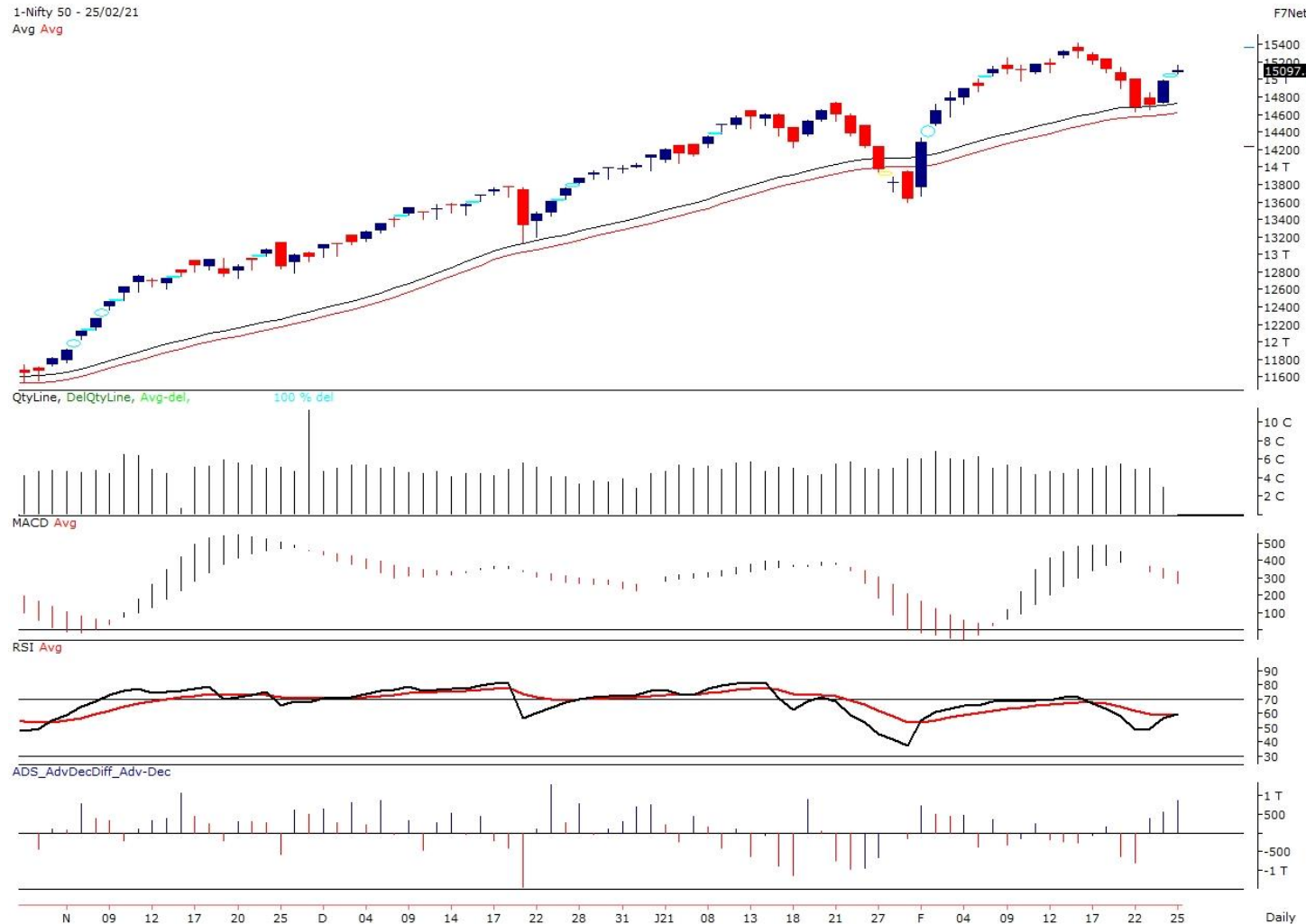
KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1776.75	-25.93	-1.43
Silver	27.73	-0.18	-0.67
Crude-Oil	63.15	-0.04	-0.06
Brent-Crude	66.82	-0.22	-0.33

INDEX TREND ANALYSIS

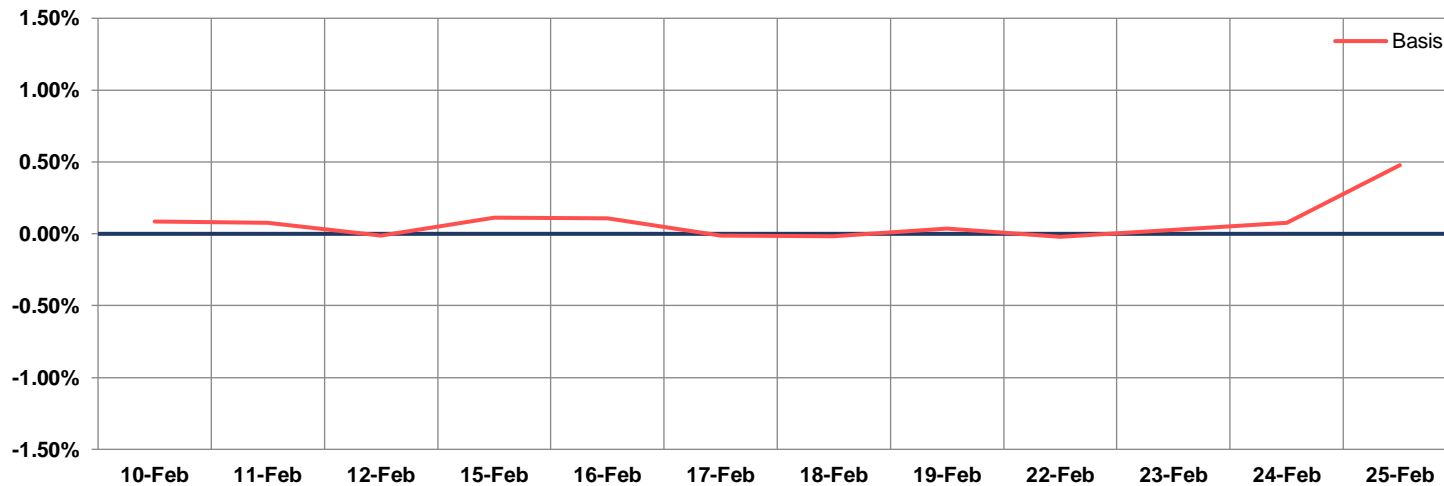
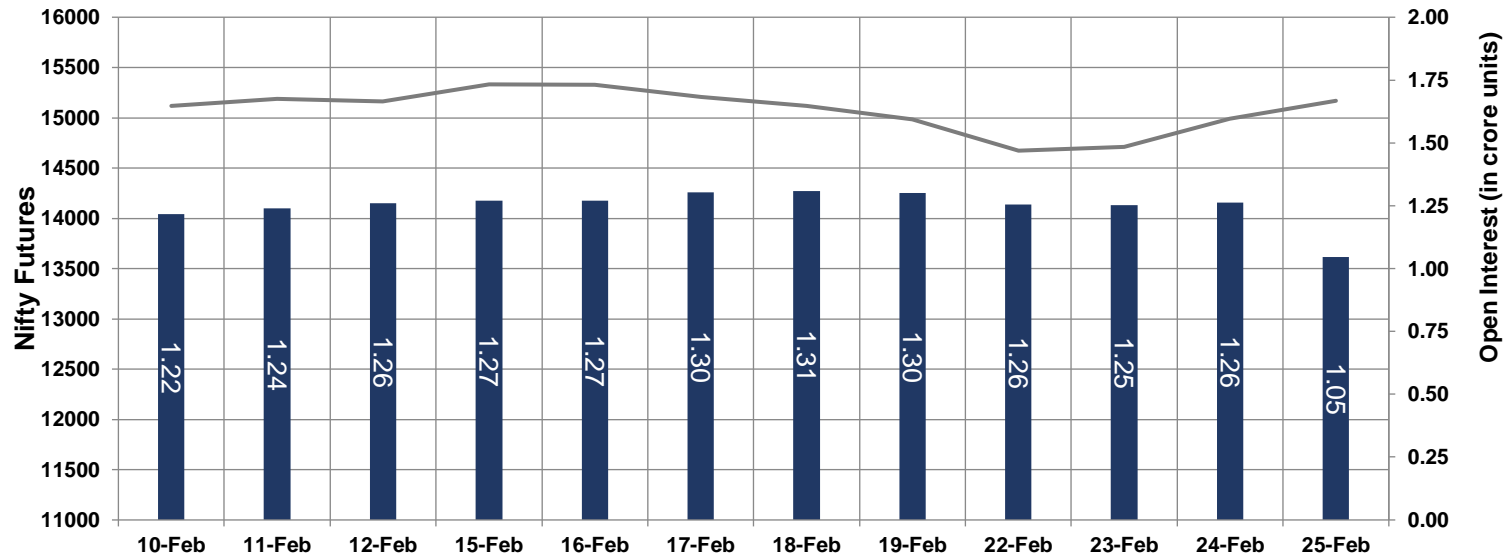
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	15097	15002	15050	15113	15161	15224	Buy	Buy	Buy
SENSEX	51039	50745	50892	51139	51286	51533	Buy	Buy	Buy
NIFTY FUTURES	15099	14980	15039	15110	15170	15241	Buy	Buy	Buy
BANK NIFTY	36549	36020	36285	36758	37023	37497	Buy	Buy	Buy
CNX IT	24872	24598	24735	24968	25105	25337	Sell	Neutral	Buy
CNX MIDCAP	23647	23414	23531	23602	23718	23789	Buy	Buy	Buy
CNX SMALLCAP	8148	8062	8105	8132	8175	8201	Buy	Buy	Buy
INDIA VIX	22.89	21.69	22.29	23.23	23.83	24.77	Neutral	Neutral	Buy

NIFTY TECHNICAL & INDICES LEVEL

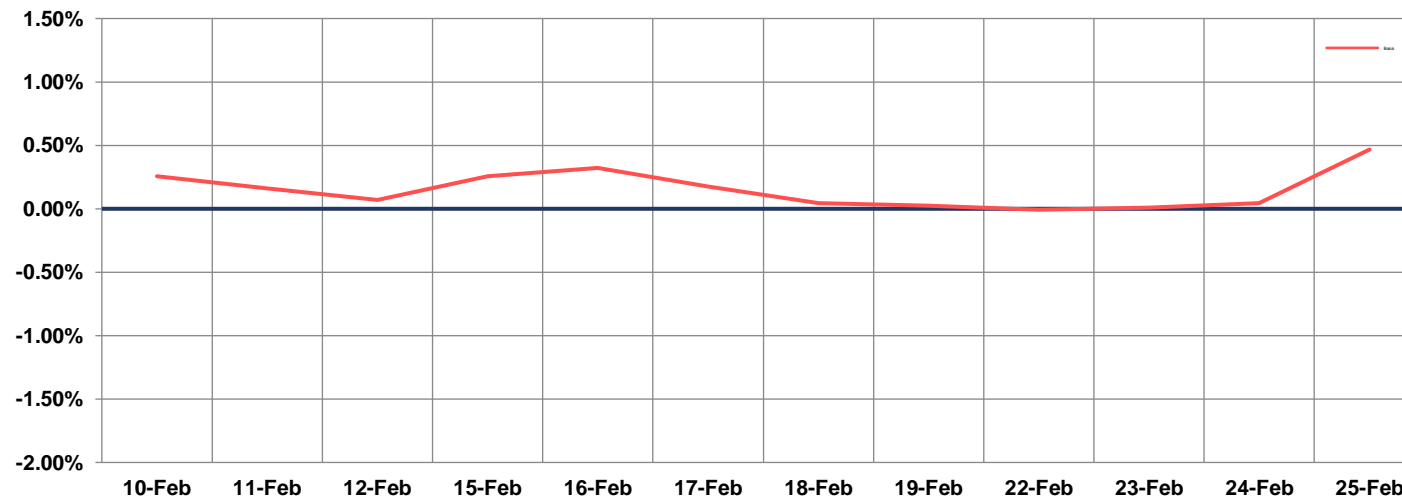
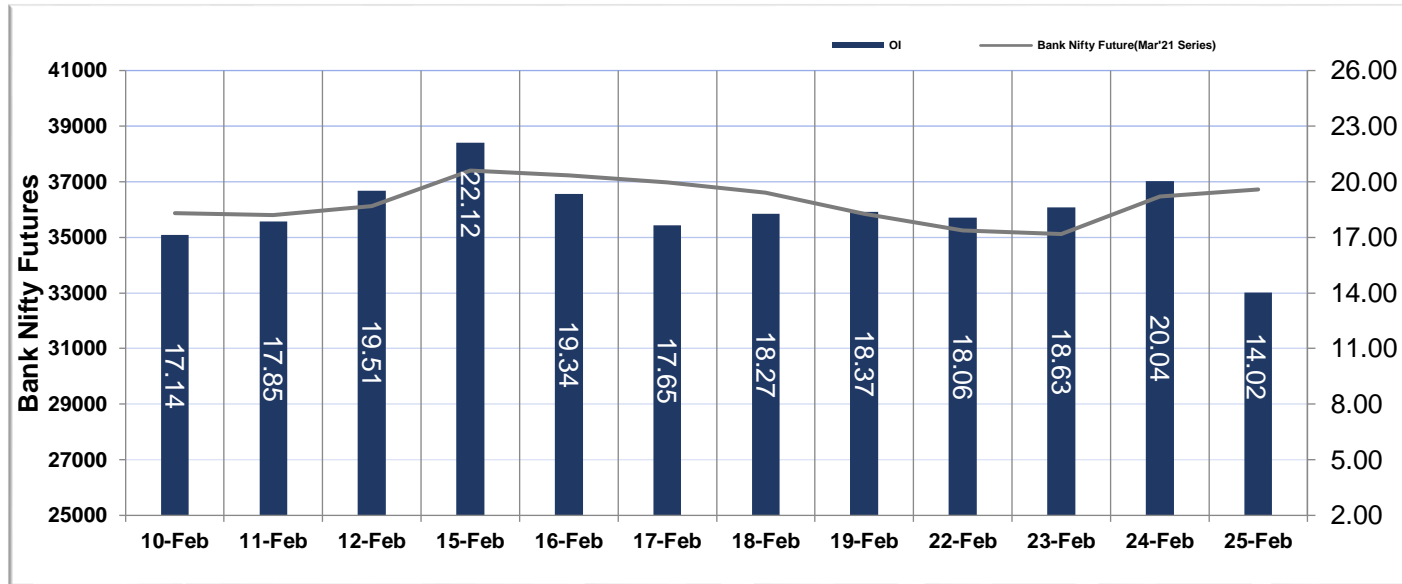


➤ Nifty Cash prices have settled at 15097.35 up by 0.77 percent from the previous close. On the upper side it has resistance of **15240** and **15370** levels, while lower side it has support of **14980** and **14840** levels. Intraday traders should be cautious and take position accordingly.

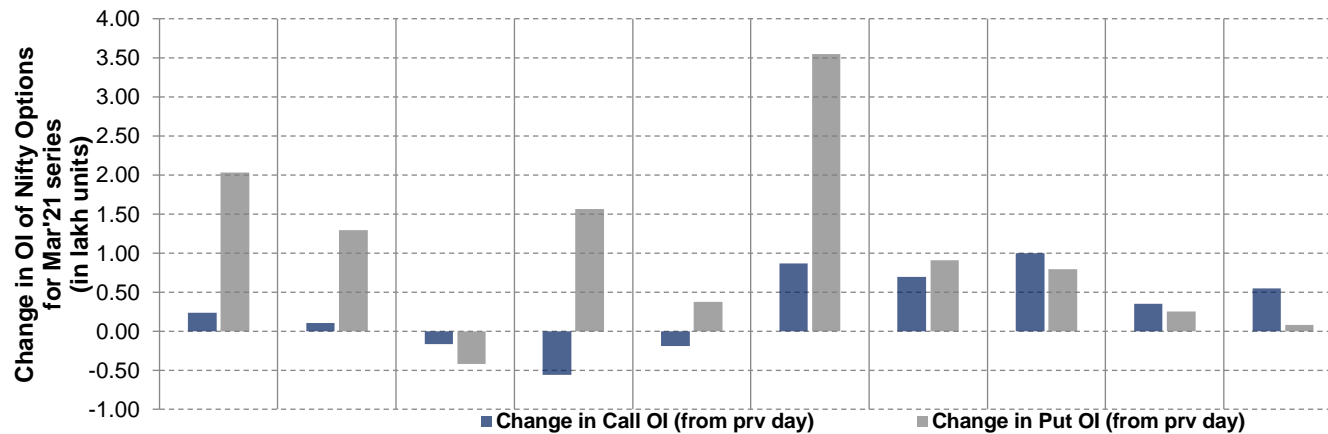
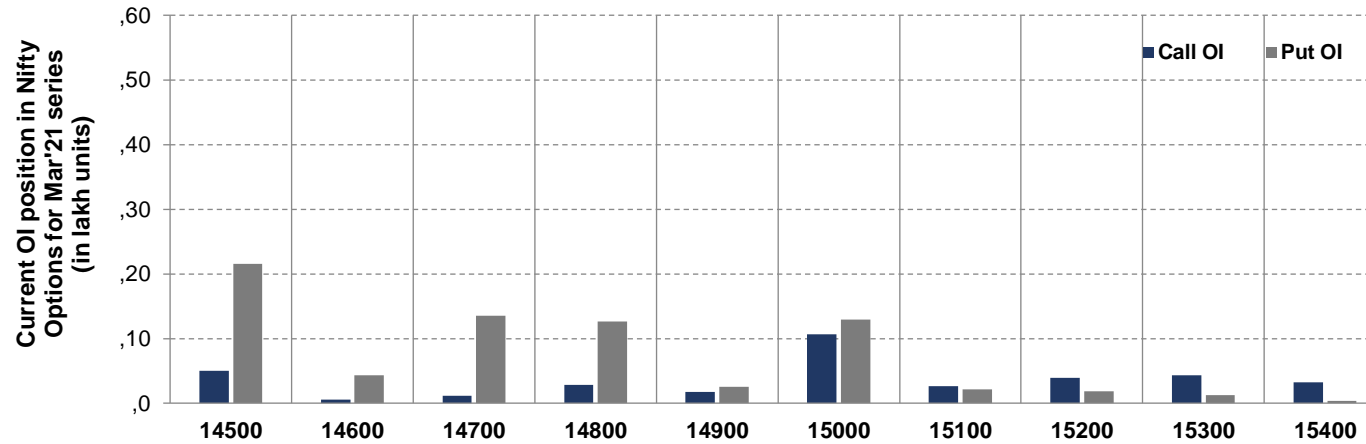
NIFTY FUTURES



BANK NIFTY FUTURES



NIFTY OPTIONS



- Among Nifty calls 15,000 SP from the March month expiry was the most active call with an addition of 0.09 million in open interests.
- Among Nifty puts 14,500 SP from the March month expiry was the most active put with an addition of 0.20 million in open interests.
- The maximum OI outstanding for Calls was at 15,000 SP (1.06mn) and that for Puts was at 14,500 SP (2.15mn)

Disclaimer:

The Information provided by SMS or in newsletter or in any document has been prepared by Shah Investor's Home Ltd (SIHL). The Information provided by SMS or in newsletter does not constitute an offer or solicitation for the purchase or sale of any financial instrument or as an official confirmation of any transaction. The information contained herein is from publicly available data or other sources believed to be reliable, but we do not represent that it is accurate or complete and it should not be relied on as such. SIHL or any of its affiliates/ group companies shall not be in any way responsible for any loss or damage that may arise to any person from any error in the information contained in this report or SMS. This Information provided by SMS, reports or in newsletter is provided for assistance only and is not intended to be and must not alone be taken as the basis for an investment decision. The user assumes the entire risk of any use made of this information. Each recipient of this Information provided by SMS, report or in newsletter should make such investigation as it deems necessary to arrive at an independent evaluation of an investment in the securities of companies referred to in this information provided by SMS, report or in newsletter (including the merits and risks involved), and should consult his own advisors to determine the merits and risks of such investment. The investment discussed or views expressed may not be suitable for all investors. This information is strictly confidential and is being furnished to you solely for your information.

The information should not be reproduced or redistributed or passed on directly or indirectly in any form to any other person or published, copied, in whole or in part, for any purpose. The information provided by report or SMS is not directed or intended for distribution to, or use by, any person or entity who is a citizen or resident of or located in any locality, state, country or other jurisdiction, where such distribution, publication, availability or use would be contrary to law, regulation or which would subject SIHL and affiliates/ group companies to any registration or licensing requirements within such jurisdiction. The distribution of this Information provided by SMS or in newsletter in certain jurisdictions may be restricted by law, and persons in whose possession this Information provided by SMS or in newsletter comes, should inform themselves about and observe, any such restrictions. The information given or Information provided by SMS, report or in newsletter is as of the date of the issue date of report or the date on which SMS provided and there can be no assurance that future results or events will be consistent with this information. This information is subject to change without any prior notice. SIHL reserves the right to make modifications and alterations to this statement as may be required from time to time. However, SIHL is under no obligation to update or keep the information current.

Nevertheless, SIHL is committed to providing independent and transparent recommendation to its client and would be happy to provide any information in response to specific client queries. Neither SIHL nor any of its affiliates, group companies, directors, employees, agents or representatives shall be liable for any damages whether direct, indirect, special or consequential including lost revenue or lost profits that may arise from or in connection with the use of the information. Past performance is not necessarily a guide to future performance. The disclosures of interest statements incorporated in the Information provided by SMS, report or in newsletter are provided solely to enhance the transparency and should not be treated as endorsement of the views expressed in the report. The analyst for this report certifies that all of the views expressed in this report accurately reflect his or her personal views about the subject company or companies and its or their securities, and no part of his or her compensation was, is or will be, directly or indirectly related to specific recommendations or views expressed in this report.

About Us:

Shah Investor's Home Ltd (SIHL) is an ISO 9001:2015 Certified financial Services Company established in 1994 at Ahmadabad, Gujarat. Customer satisfaction is guaranteed through our diversified product portfolio, professional management and customer first attitude. SIHL was the first broking house in Gujarat with membership in National Securities Depository Ltd (NSDL) and was the first broking name providing services in NSE F&O in Ahmedabad. Today, SIHL ranks among the top most players in Gujarat in retail stock broking area with 45 branches, 350 franchisee across India and providing service to more than 1,25,000 clients.