

Morning Mantra

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

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MARKET COMMENTARY

Indian equity markets witnessed complete bloodbath on Friday, as both Sensex and Nifty ended with sharp losses. The start of the day was in red terrain, as traders remained concerned ahead of the Q3 gross domestic product (GDP) data, to be released later in the day, which will shed light on whether the economy continued to be in recession in the third quarter of FY21 or it ended with the second quarter only. Traders also took note of report that a nationwide bandh call has been given by the Confederation of All India Traders (CAIT) to protest against rising fuel prices, the E-Way Bill, and the complex structure of the Goods and Services Tax (GST). Marketplaces across India are to remain shut on February 26, 2021 as over 40,000 trader associations have responded to the cause.

Markets continued to fall during the trading session, as sentiments remained down-beat with Moody's Investors Service stating that loans to retail customers, especially those to low-income borrowers, will remain most affected due to the shock caused by the coronavirus pandemic. Market participants took a note of WTO review report stated that India's trade policy had remained largely unchanged since the previous review (in 2015), with continued heavy reliance on instruments such as the tariff, export taxes, minimum import prices, import and export restrictions, and licensing. On customs duties, it said, concerns were expressed with respect to its complexity and uncertainty, the increase in tariff rates, tariff preferences and tariff concessions.

In the last hour of the trading session, key indices added more losses, amid reports that capital markets regulator Sebi chairman Ajay Tyagi acknowledged the systemic risk concerns raised by the RBI and Financial Stability Board over a disconnect between markets and the real economy, but said that this is a global phenomenon also observed in India. He said that after the massive fall in markets in March 2020, a strong rebound starting from April was the sharpest V-shaped recovery in the last 30 years.

On the global front, European markets were trading lower, joining a global selloff on fears that this year's expected economic recovery will fuel inflation and spark interest rate hikes. Asian markets ended lower on Friday, even after Malaysia's exports rose in January. The data from the Department of Statistics showed that exports rose 6.6 percent year-on-year to MYR 89.6 billion in January. Imports increased 1.3 percent annually to MYR 73.0 billion in January.

MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	49099.99	-1939	-3.80
NIFTY	14529.15	-568.20	-3.76
MIDCAP	19978.65	-355.15	-1.75
SMLCAP	20155.35	-149.63	-0.74
BSEFMC	11966.59	-187.17	-1.54
AUTO	22937.66	-733.14	-3.10
POWER	2418.77	-29.44	-1.20
REALTY	2786.95	-51.43	-1.81
BSE IT	24423.97	-564.85	-2.26
BANKEX	38981.16	-1996	-4.87
OIL GAS	15543.42	-600.89	-3.72
METAL	13719.16	-376.95	-2.67
INDIA VIX	28.14	5.25	22.93

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	577	1369	82
BSE	1020	1902	179

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	6409	7480	(14)
NSE CASH	115965	84444	37
NSE F&O	3047949	8615815	(65)

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	39.65	4.12	1.09
SENSEX	33.86	3.28	0.74

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	7535	6035	1500
FII	22163	30459	(8295)

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	8984.03	12790.39	(3806)
Index Options	431940.94	428562.00	3379
Stock Futures	22845.50	23545.47	(700)
Stock Options	16351.20	16621.58	(270)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.02	1.28
BANK NIFTY	0.63	0.96

SECURITIES BAN FOR TRADE IN F&O FOR 01-03-2021

NIL

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.235	6.182	0.86
USA	1.474	1.515	-2.73

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	90.93	90.13	0.88

CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
26-Mar-21 USD-INR	74.27	1.55	2.13
26-Mar-21 EUR-INR	89.88	0.95	1.07
26-Mar-21 GBP-INR	103.30	0.44	0.43
26-Mar-21 JPY- INR	69.80	1.21	1.77

KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1733.43	-36.43	-2.06
Silver	26.63	-0.85	-3.10
Crude-Oil	61.61	-1.92	-3.02
Brent-Crude	64.63	-1.48	-2.24

INDEX TREND ANALYSIS

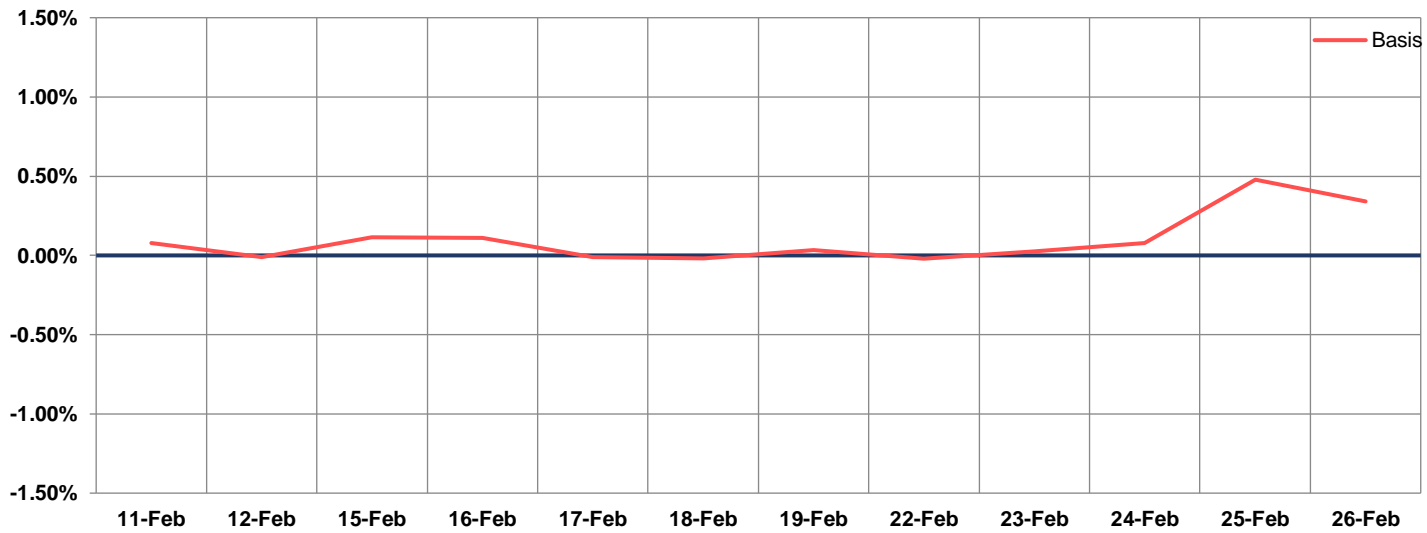
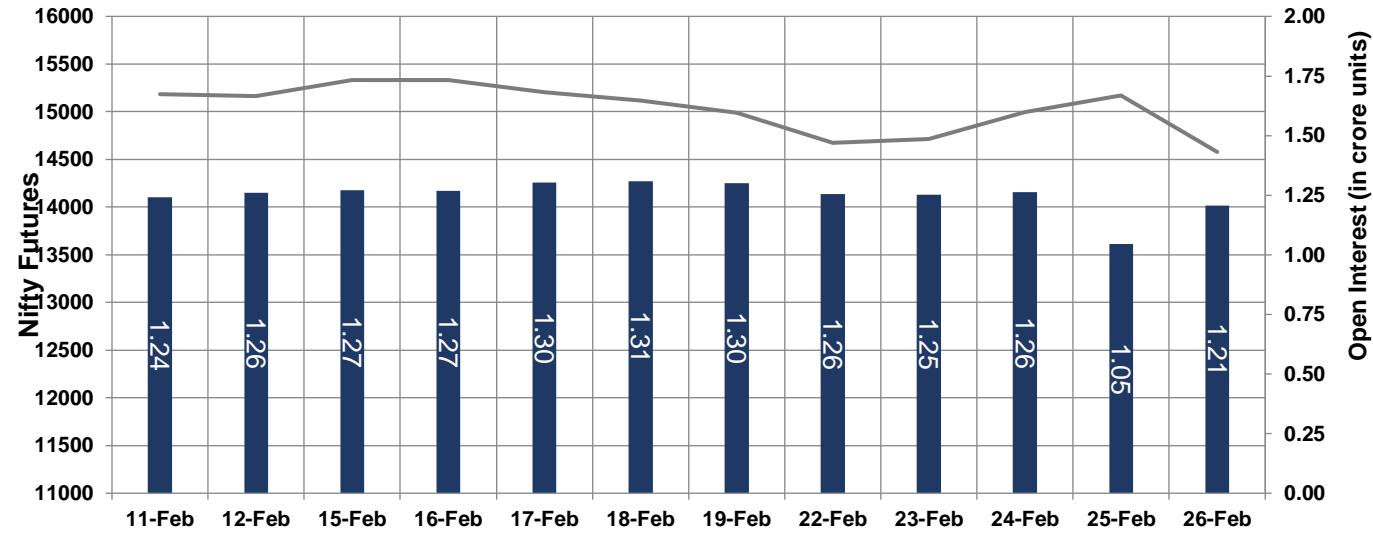
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	14529	14187	14358	14639	14810	15090	Neutral	Neutral	Buy
SENSEX	49100	47954	48527	49464	50037	50973	Neutral	Neutral	Buy
NIFTY FUTURES	14565	14251	14408	14679	14836	15107	Neutral	Neutral	Buy
BANK NIFTY	34804	33878	34341	35122	35585	36366	Neutral	Buy	Buy
CNX IT	24301	23925	24113	24401	24589	24877	Sell	Neutral	Buy
CNX MIDCAP	23269	22795	23032	23305	23542	23815	Neutral	Buy	Buy
CNX SMALLCAP	8050	7913	7981	8060	8129	8207	Buy	Buy	Buy
INDIA VIX	28.14	20.13	24.14	26.89	30.90	33.65	Buy	Buy	Buy

NIFTY TECHNICAL & INDICES LEVEL

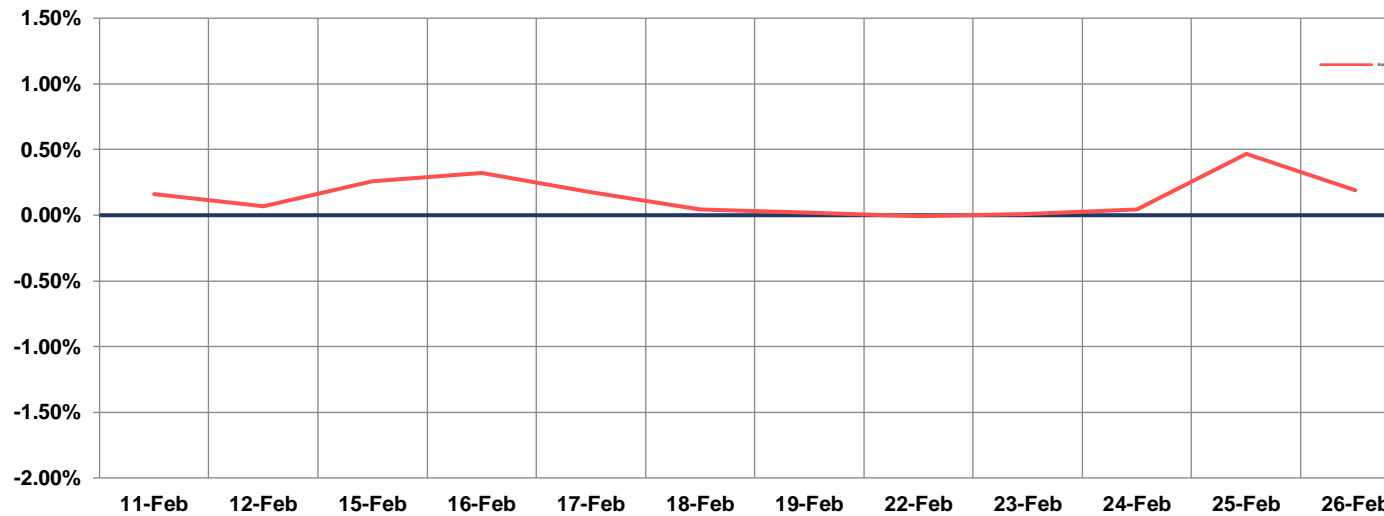
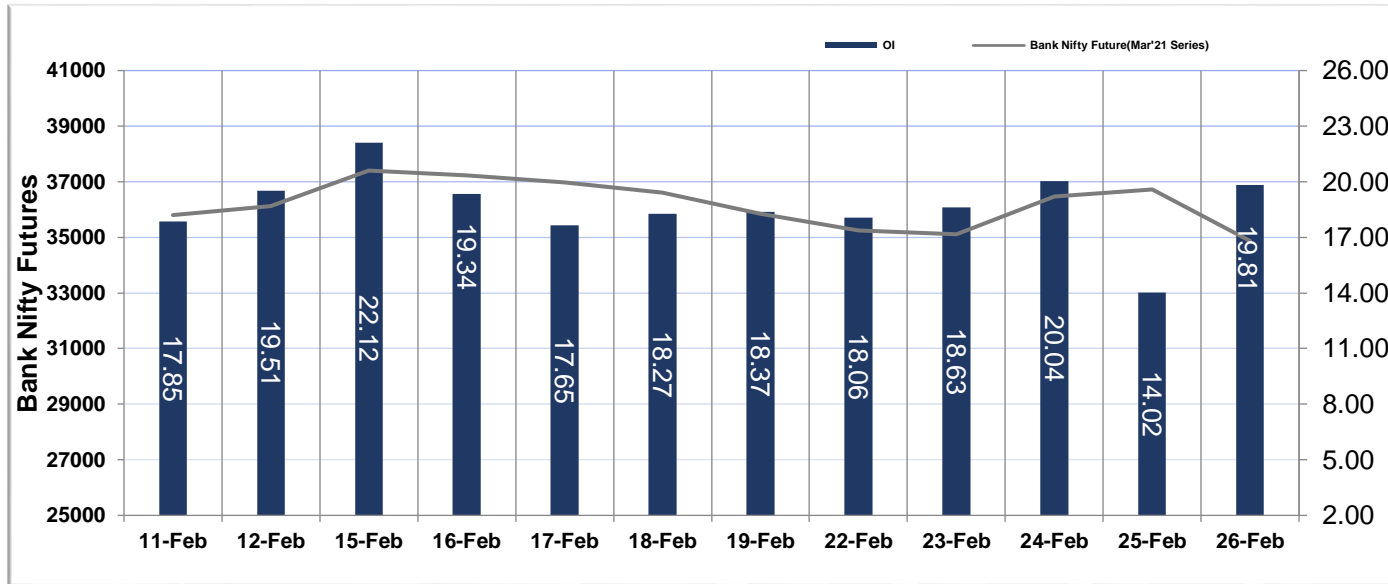


➤ Nifty Cash prices have settled at 14529.15 down by 3.76 percent from the previous close. On the upper side it has resistance of **14670** and **14790** levels, while lower side it has support of **14420** and **14297** levels. Intraday traders should be cautious and take position accordingly.

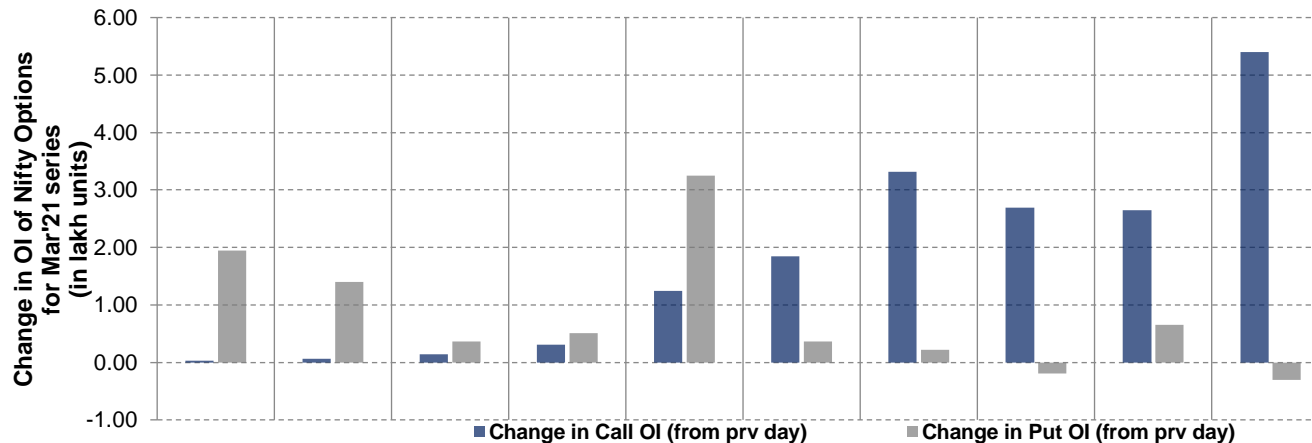
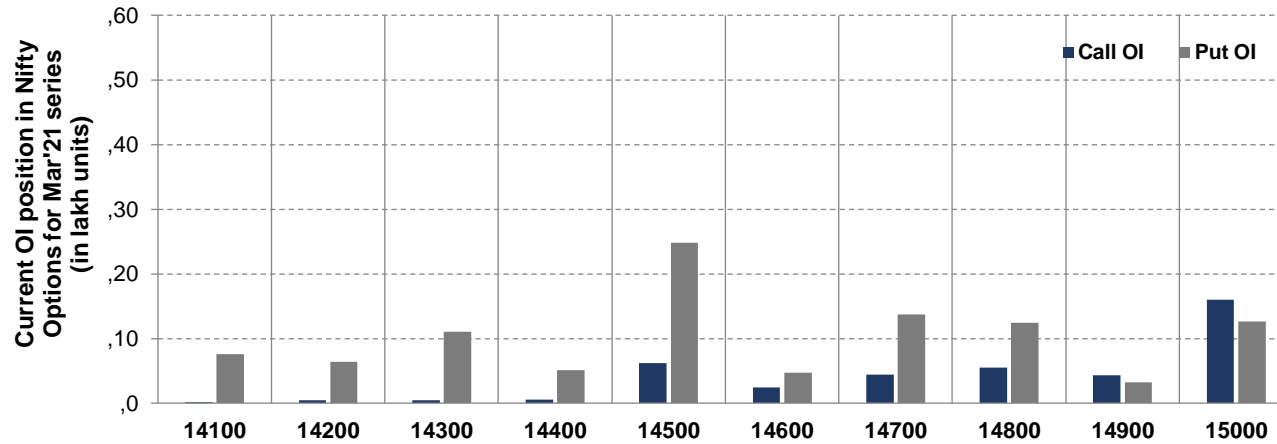
NIFTY FUTURES



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 0.54 million in open interests.
- Among Nifty puts 14,500 SP from the March month expiry was the most active put with an addition of 0.32 million in open interests.
- The maximum OI outstanding for Calls was at 15,000 SP (1.60mn) and that for Puts was at 14,500 SP (2.50mn)

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