

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 Friday. After a negative start of the day, key indices remained lower during the trading session, as India's tally of coronavirus cases has risen to 11,173,572, with a daily increase of 16,824 in total cases. Death toll has reached 157,584, with 113 fatalities in a day. India's count of active cases has jumped to 177,967. The country continues to be second-most-affected globally, and ranks 13th among worst-hit nations by active cases. Maharashtra, the most affected state overall, has reported 9,000 new cases. The state has added nearly 80,000 cases in the past 10 days.

In the first half of the session, losses were limited, as traders took some relief with the government data showing that foreign direct investment (FDI) in India grew 40 percent to \$51.47 billion during April-December 2020-21. India has attracted 22 percent higher FDI inflow (including re-invested earnings) of \$67.54 billion during the first nine months of the current fiscal as against \$55.14 billion in the same period of 2019-20. Traders were seen taking note of reports that Prime Minister Narendra Modi laid emphasis on working hard to make manufacturing in India globally competitive and said that the government's thinking is 'minimum government, maximum governance'.

Markets added losses during the second half of the trading session, amid negative cues from the global markets. Market participants overlooked India Ratings and Research's report stated that Non-Bank Finance Companies (NBFCs) are estimated to witness a 9.5 per cent jump in their assets under management in FY22, after a growth moderation in FY21. Maintaining its 'stable' outlook on both NBFCs and HFCs for FY22, it said Housing Finance Companies (HFCs) will post a higher growth at 10 per cent as home sales go up.

On the global front, European markets were trading lower amid fears of a rise in interest rates and a continued rotation out of growth stocks into the likes of industrials. Asian markets ended mostly lower on Friday, after Singapore retail sales decreased in January. The data from the Department of Statistics showed that retail sales declined 6.1 percent year-on-year in January, following a 3.3 percent fall in December. Motor vehicle sales rose 10.3 percent annually in January, following a 3.3 percent growth in the previous month. Excluding motor vehicles, retail sales fell 8.4 percent in January, following a 4.2 percent decrease in the preceding month.

MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	50405.32	-440.76	-0.87
NIFTY	14938.10	-142.65	-0.95
MIDCAP	20587.80	-396.39	-1.89
SMLCAP	20936.02	-318.05	-1.50
BSEFMC	12310.87	-23.28	-0.19
AUTO	23740.00	-212.09	-0.89
POWER	39692.34	-549.45	-1.36
REALTY	2846.83	-42.23	-1.46
BSE IT	25432.41	-375.19	-1.45
BANKEK	39692.34	-546.45	-1.36
OIL GAS	16090.80	28.42	0.18
METAL	13905.84	-306.81	-2.16
INDIA VIX	25.56	1.41	5.84

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	533	1421	74
BSE	1010	1975	144

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	5463	6855	(20)
NSE CASH	77276	81008	(5)
NSE F&O	2556871	9547789	(73)

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	40.76	4.23	1.06
SENSEX	35.12	3.40	0.71

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	3633	4824	(1191)
FII	9383	11397	(2014)

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	5714.59	5646.86	68
Index Options	329777.64	329648.49	129
Stock Futures	15545.30	15842.21	(297)
Stock Options	16022.00	16202.26	(180)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.12	1.24
BANK NIFTY	0.69	0.89

SECURITIES BAN FOR TRADE IN F&O FOR 08-03-2021

BANKBARODA
BHEL
PNB
SAIL
SUNTV

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.232	6.212	0.32
USA	1.577	1.554	1.45

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	91.98	91.63	0.39

CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
26-Mar-21 USD-INR	73.32	0.33	0.45
26-Mar-21 EUR-INR	87.54	-0.42	-0.48
26-Mar-21 GBP-INR	101.26	-0.44	-0.43
26-Mar-21 JPY- INR	67.64	-0.41	-0.61

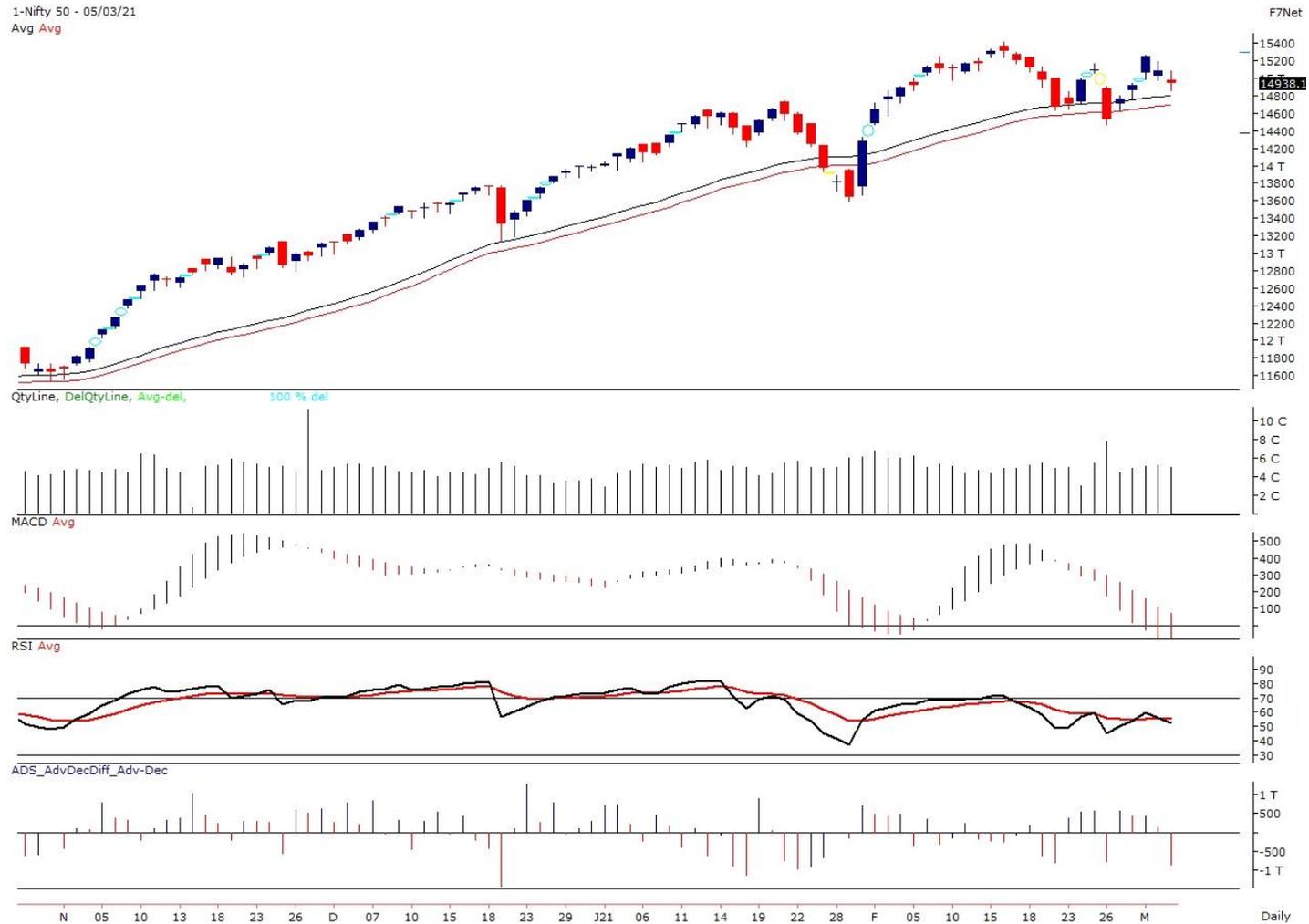
KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1697.02	2.75	0.16
Silver	25.19	-0.14	-0.56
Crude-Oil	66.36	2.53	3.96
Brent-Crude	69.69	2.95	4.42

INDEX TREND ANALYSIS

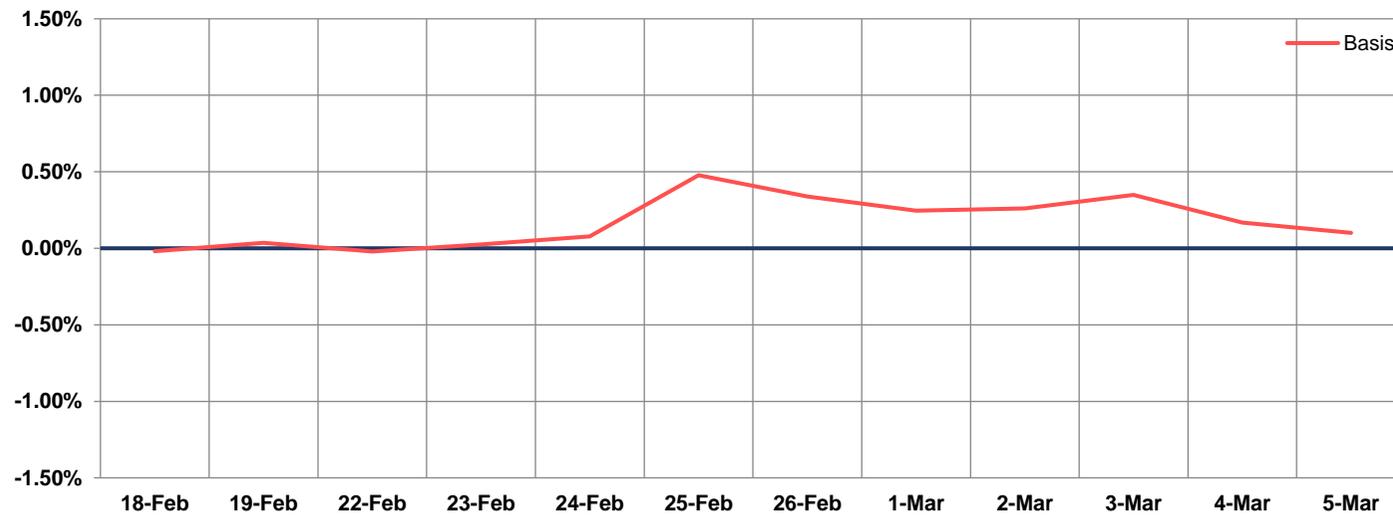
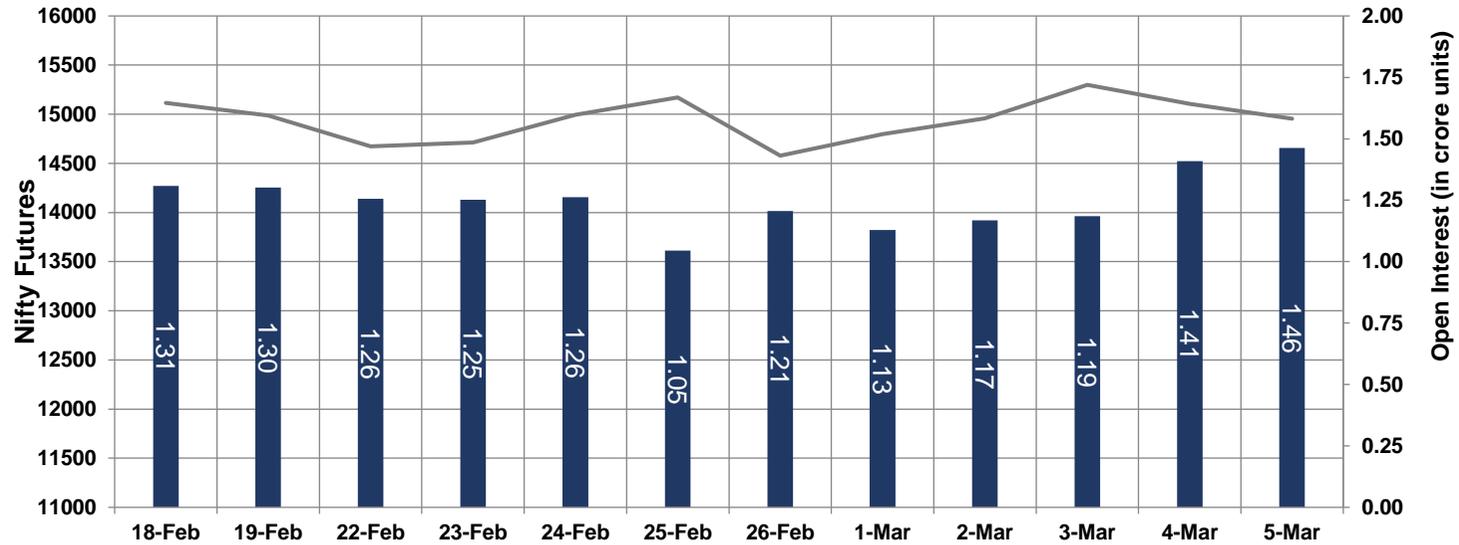
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	14938	14734	14836	14964	15066	15194	Neutral	Buy	Buy
SENSEX	50405	49758	50082	50484	50807	51210	Neutral	Buy	Buy
NIFTY FUTURES	14979	14743	14861	14980	15098	15216	Neutral	Buy	Buy
BANK NIFTY	35228	34523	34876	35246	35598	35969	Neutral	Buy	Buy
CNX IT	25230	24763	24996	25347	25580	25931	Sell	Buy	Buy
CNX MIDCAP	24078	23517	23798	24218	24499	24919	Neutral	Buy	Buy
CNX SMALLCAP	8368	8171	8269	8419	8517	8667	Buy	Buy	Buy
INDIA VIX	25.56	21.39	23.48	24.94	27.03	28.49	Buy	Buy	Buy

NIFTY TECHNICAL & INDICES LEVEL

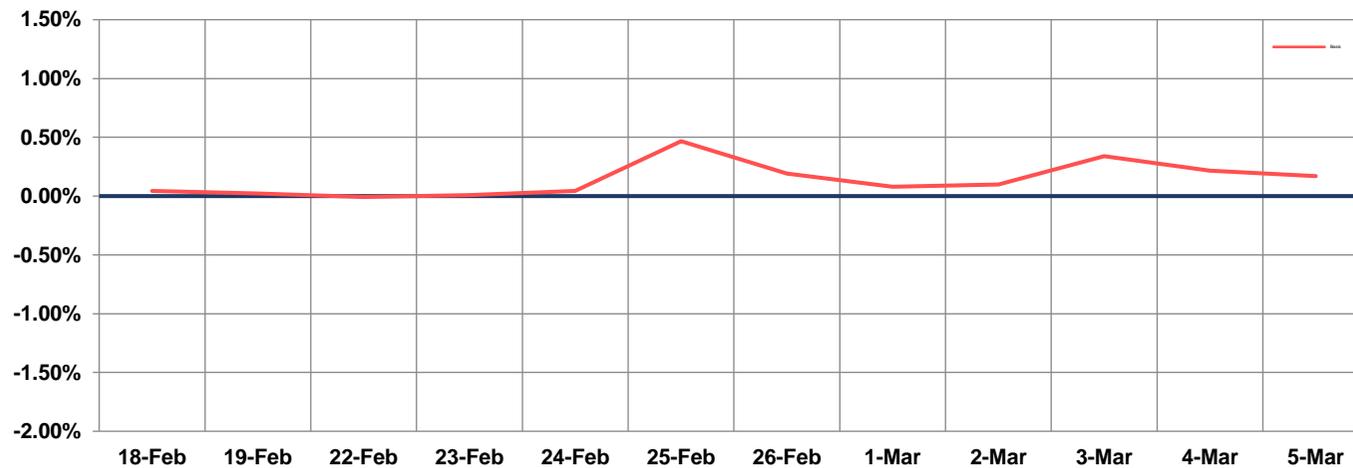
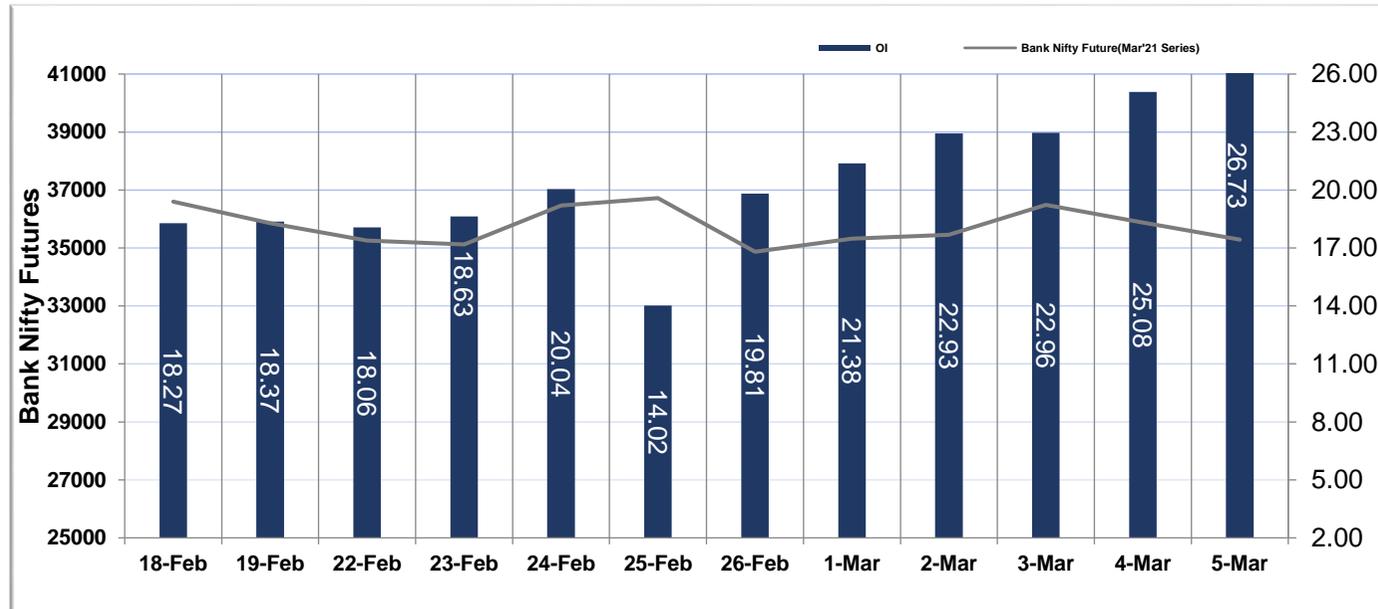


➤ Nifty Cash prices have settled at **14938.10** down by 0.95 percent from the previous close. On the upper side it has resistance of **15090** and **15245** levels, while lower side it has support of **14790** and **14650** levels. Intraday traders should be cautious and take position accordingly.

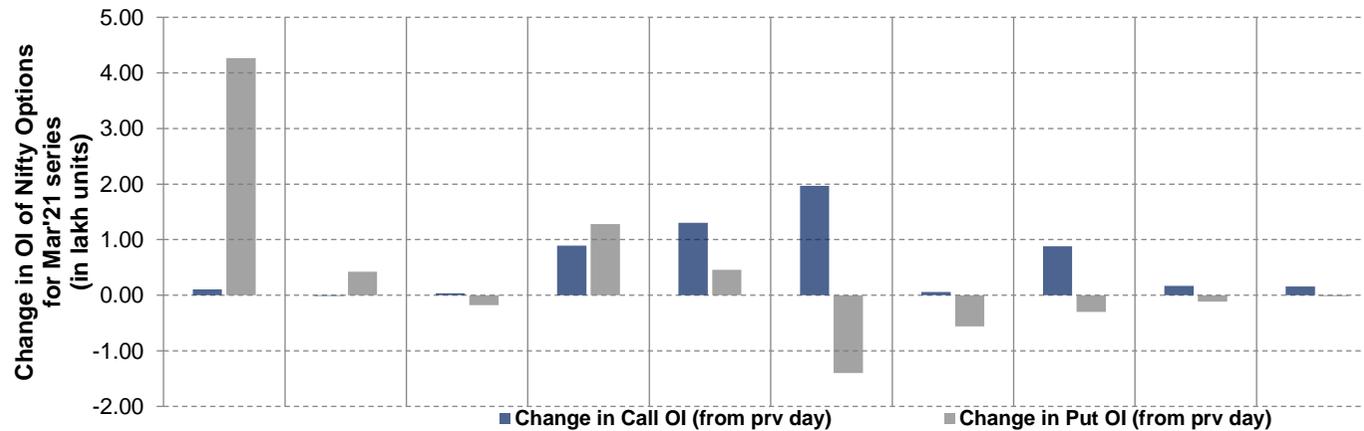
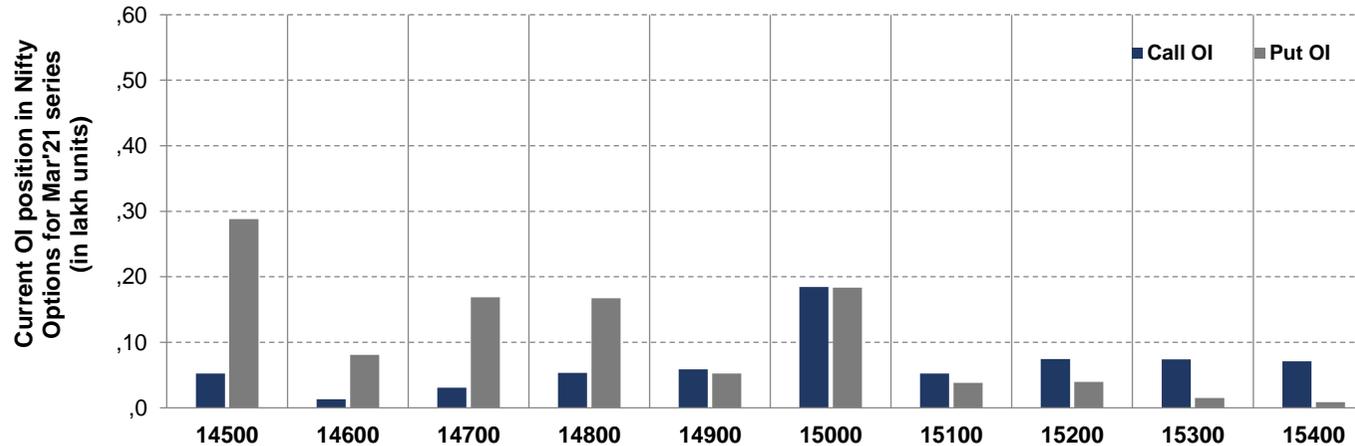
NIFTY FUTURES



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 0.20 million in open interests.
- Among Nifty puts 14,500 SP from the March month expiry was the most active put with an addition of 0.43 million in open interests.
- The maximum OI outstanding for Calls was at 15,000 SP (1.84mn) and that for Puts was at 14,500 SP (2.90mn)

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