
Morning Mantra

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

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MARKET COMMENTARY

Indian equity benchmarks ended near day's high points on Tuesday. After a strong start, markets remained higher in the first half of the session, taking support with Finance Minister Nirmala Sitharaman's statement that the fiscal measures taken by the government have resulted in positive growth of 0.4 per cent in the third quarter of the current financial year. The minister further said that the gradual unlocking of the economy has eased supply-side disruptions enabling inflation to decline from 7.6 per cent in October, 2020 to 4.1 per cent in January 2021, mainly on account of decline in food inflation. She added that the economy is estimated to contract by 8 per cent during 2020-21 due to the impact of the COVID-19 pandemic.

Markets turned negative during the second half of the session, as the coronavirus cases in India jumped to 11,244,624 with 15,353 new infections reported across the country, according to Worldometer. The death toll, meanwhile, reached 157,966 with 76 fatalities in the last 24 hours. But, in the last hour of the trading session, markets added notable gains to end the day on a higher note, after Ministry of Finance, Department of Expenditure has released the 19th weekly installment of Rs 2,104 crore to the States. Out of this, an amount of Rs 2,103.95 crore has been released to 7 States and an amount of Rs. 0.05 crore has been released to the Union Territory of Puducherry.

Domestic sentiments were positive with Chief Economist of the IMF Gita Gopinath's statement that India has been at the forefront in fighting the coronavirus pandemic and 'really stands out' in terms of its vaccine policy. She noted that India has been providing vaccines through grants to several of its neighbour countries, including Bangladesh, Nepal and Myanmar, and through commercial arrangements as well. Traders also got relief, amid reports that banks have written off bad loans to the tune of Rs 1.15 lakh crore during the first three-quarters of the current fiscal. Minister of State for Finance Anurag Singh Thakur said in a written reply to the Lok Sabha that as per RBI guidelines and policy approved by bank Boards, non-performing loans, including those in respect of which full provisioning has been made on completion of four years, are removed from the balance-sheet of the bank concerned by way of write-off.

On the global front, European markets were trading mostly in green even after the Bank of England (BOE) governor warned on the prospect of rising inflation. Asian markets ended mostly higher on Tuesday, after Japan's gross domestic product climbed an annualized 11.7 percent in the fourth quarter of 2020. That missed expectations for an increase of 12.8 percent following the 22.9 percent surge in the three months prior.

MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	51025.48	584.41	1.16
NIFTY	15098.40	142.20	0.95
MIDCAP	20512.22	-137.22	-0.66
SMLCAP	20981.64	-85.56	-0.41
BSEFMC	12273.25	9.61	0.08
AUTO	23626.35	-81.20	-0.34
POWER	2501.26	-29.55	-1.17
REALTY	2785.81	-34.32	-1.22
BSE IT	25896.99	228.79	0.89
BANDEX	40457.22	743.41	1.87
OIL GAS	16019.77	-331.06	-2.02
METAL	13744.54	-314.43	-2.20
INDIA VIX	22.49	-2.18	-8.83

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	739	1210	72
BSE	1257	1736	200

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	4974	4222	18
NSE CASH	71527	60615	18
NSE F&O	4687496	3407749	38

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	41.12	4.28	1.05
SENSEX	35.65	3.45	0.70

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	6216	4966	1250
FII	11281	8479	2802

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	6545.58	4810.28	1735
Index Options	551308.86	547266.97	4042
Stock Futures	12165.57	13293.96	(1128)
Stock Options	13215.98	13281.29	(65)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.11	1.06
BANK NIFTY	0.86	0.71

SECURITIES BAN FOR TRADE IN F&O FOR 10-03-2021

BANKBARODA
PNB
SAIL
SUNTV

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.206	6.223	-0.27
USA	1.533	1.594	-3.81

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	92.07	92.31	-0.26

CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
26-Mar-21 USD-INR	73.13	-0.26	-0.36
26-Mar-21 EUR-INR	87.17	-0.08	-0.09
26-Mar-21 GBP-INR	101.60	0.04	0.03
26-Mar-21 JPY- INR	67.35	-0.33	-0.49

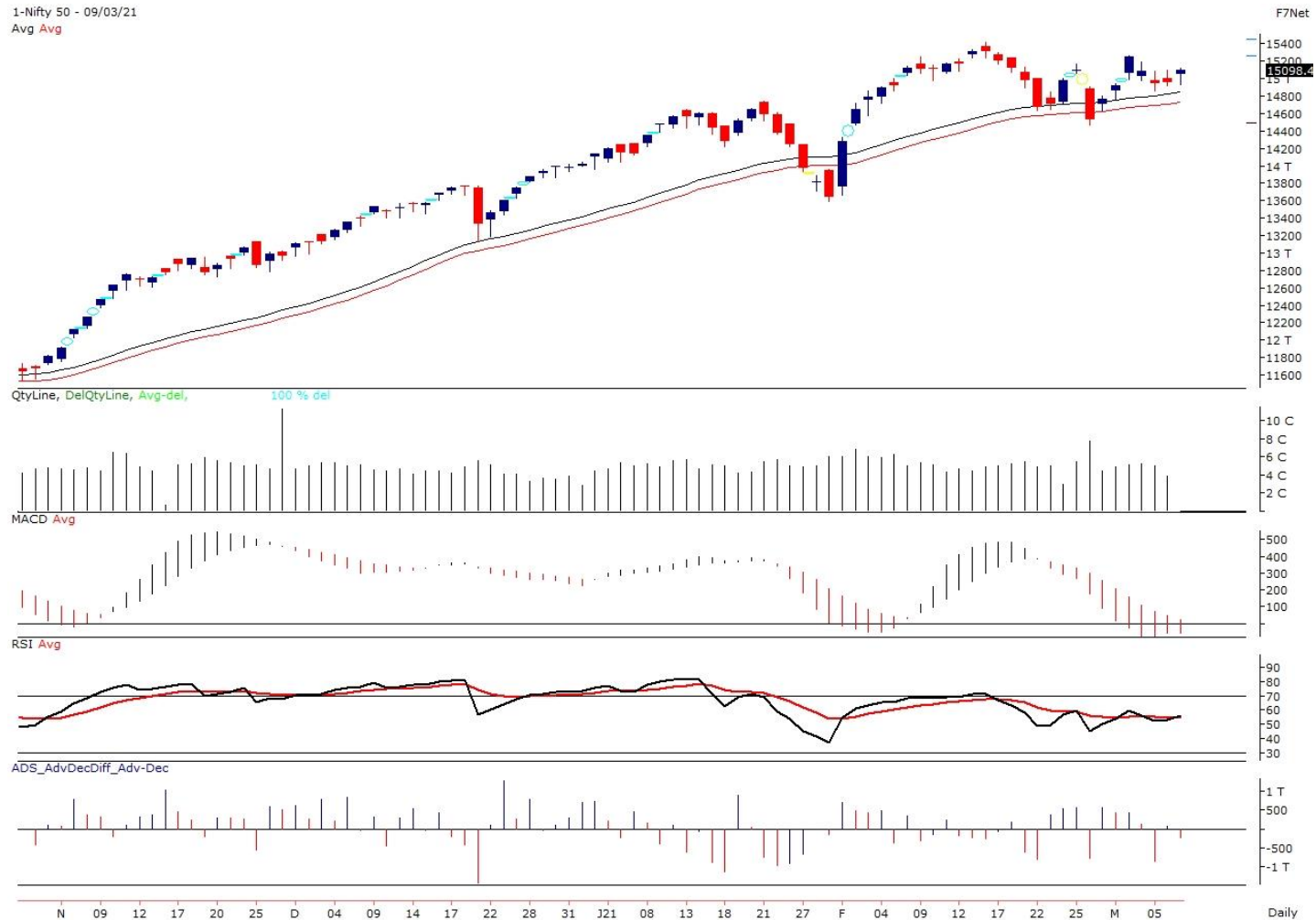
KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1716.02	31.34	1.87
Silver	25.96	0.80	3.20
Crude-Oil	64.35	-0.69	-1.06
Brent-Crude	67.82	-0.42	-0.62

INDEX TREND ANALYSIS

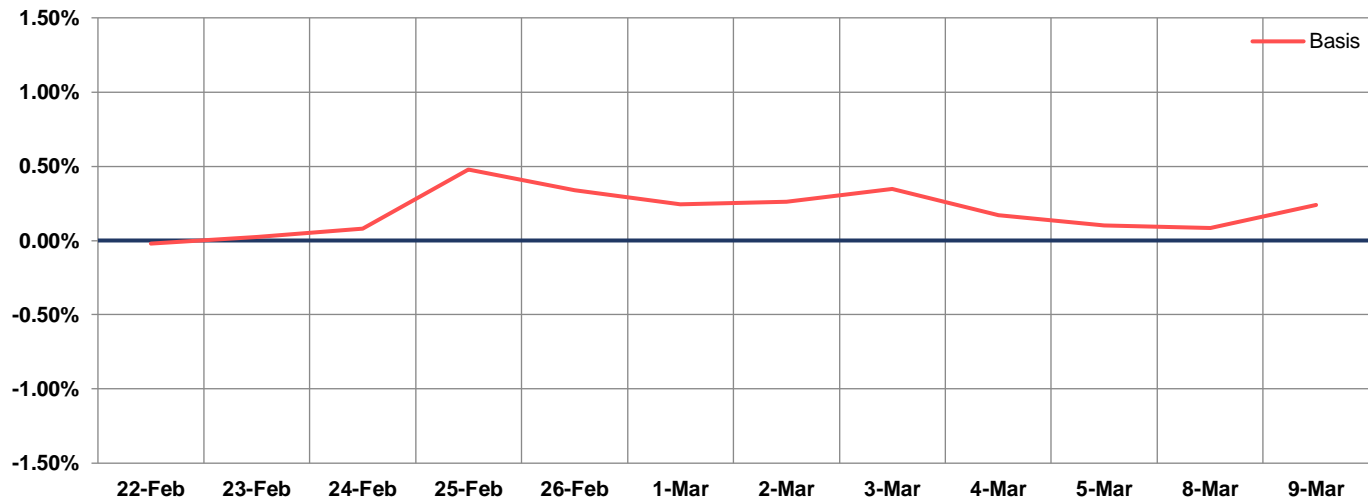
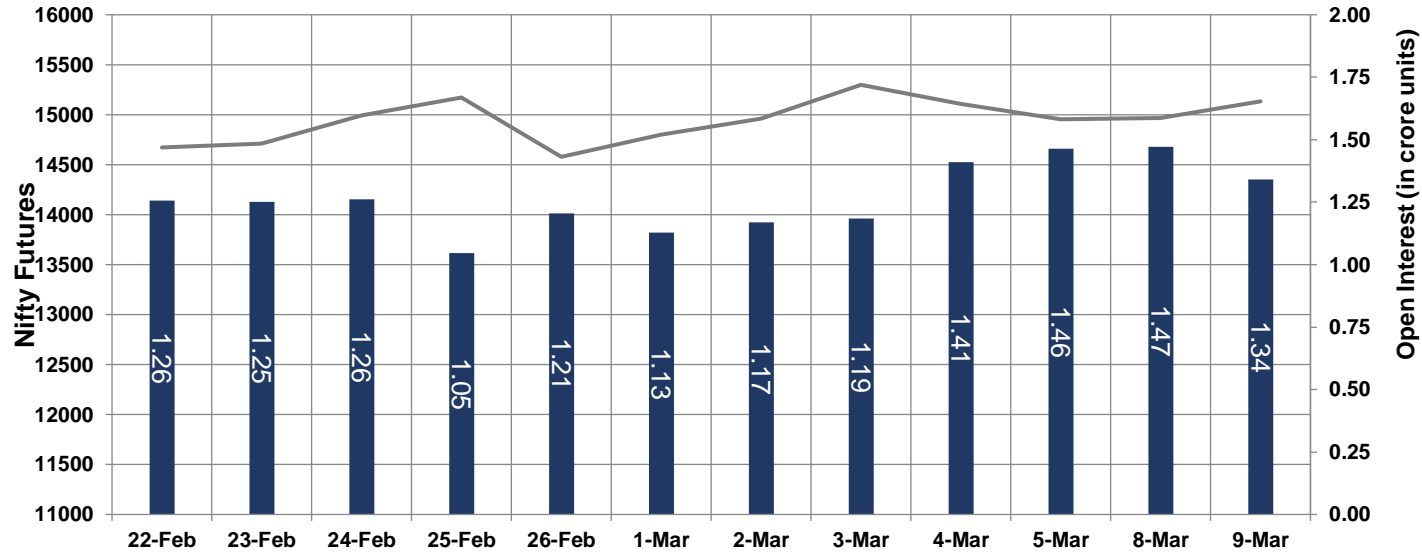
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	15098	14849	14974	15050	15175	15252	Buy	Buy	Buy
SENSEX	51025	50129	50577	50845	51293	51560	Buy	Buy	Buy
NIFTY FUTURES	15140	14865	15002	15091	15229	15318	Buy	Buy	Buy
BANK NIFTY	35866	35297	35581	35829	36114	36362	Buy	Buy	Buy
CNX IT	25582	24864	25223	25455	25814	26045	Neutral	Buy	Buy
CNX MIDCAP	24024	23539	23781	24076	24318	24613	Neutral	Buy	Buy
CNX SMALLCAP	8324	8131	8227	8367	8464	8604	Neutral	Buy	Buy
INDIA VIX	22.50	19.63	21.06	22.87	24.30	26.11	Neutral	Buy	Buy

NIFTY TECHNICAL & INDICES LEVEL

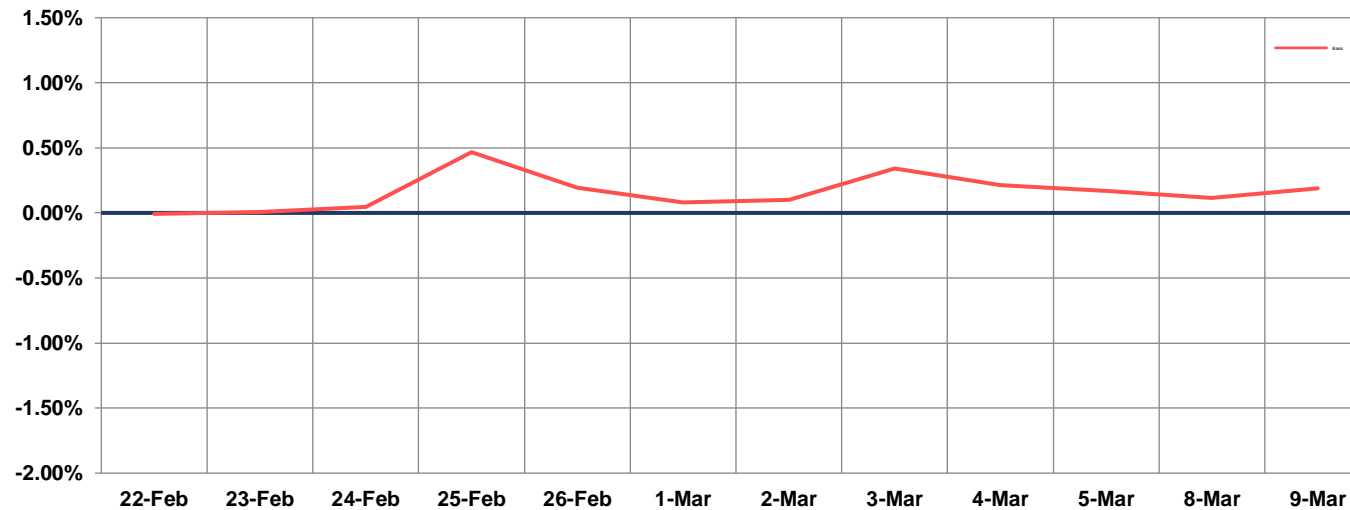
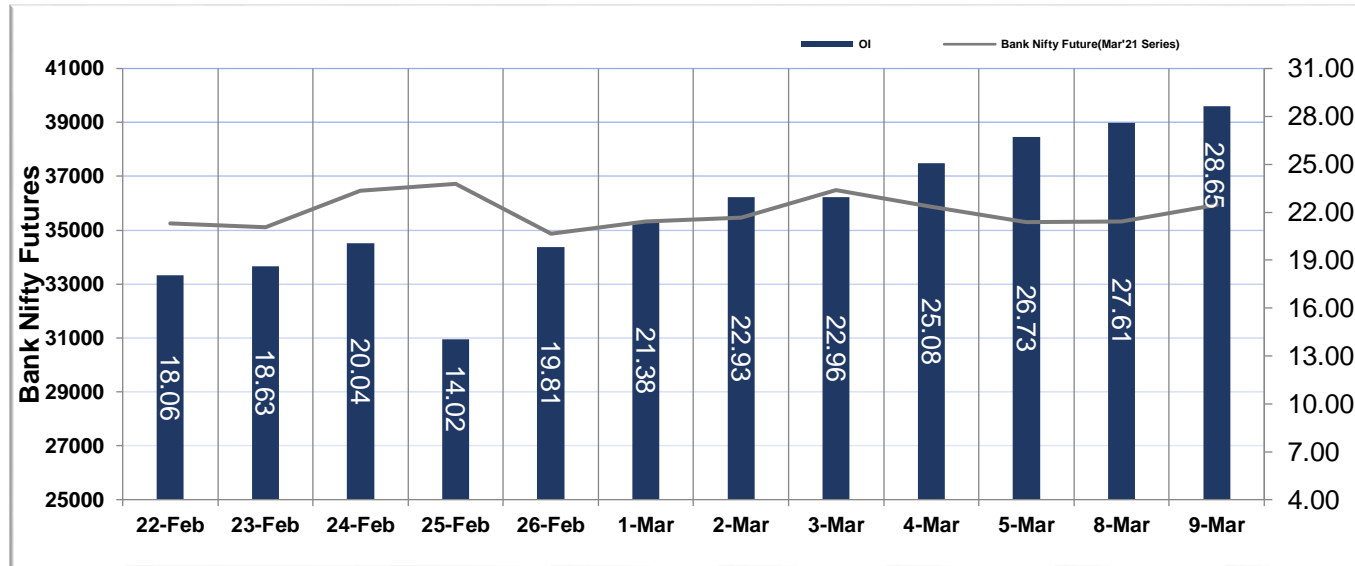


➤ Nifty Cash prices have settled at **15098.40** up by 0.95 percent from the previous close. On the upper side it has resistance of **15170** and **15330** levels, while lower side it has support of **14990** and **14870** levels. Intraday traders should be cautious and take position accordingly.

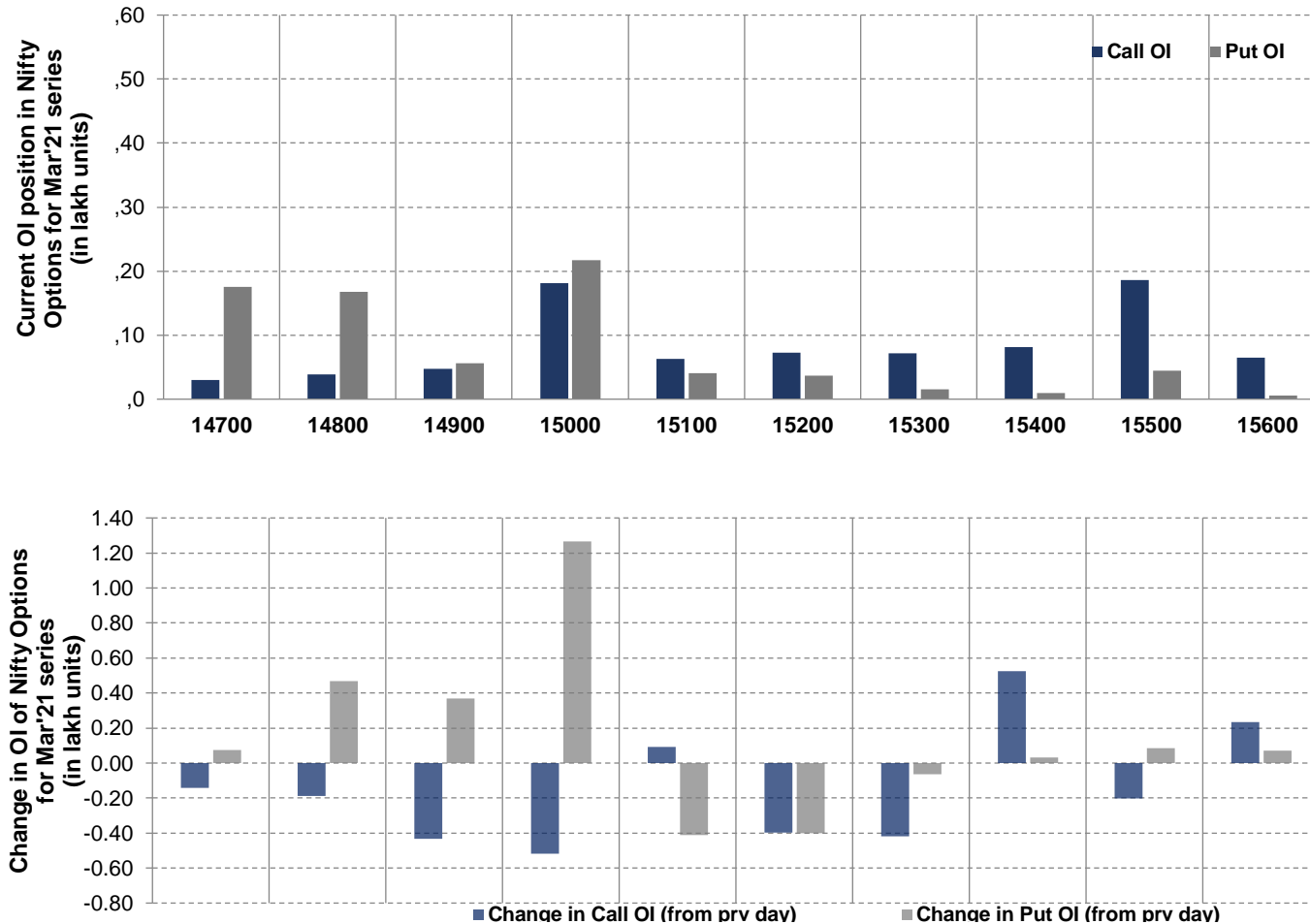
NIFTY FUTURES



BANK NIFTY FUTURES



NIFTY OPTIONS



- Among Nifty calls 15,500 SP from the March month expiry was the most active call with a reduction of 0.02 million in open interests.
- Among Nifty puts 15,000 SP from the March month expiry was the most active put with an addition of 0.13 million in open interests.
- The maximum OI outstanding for Calls was at 15,500 SP (1.90mn) and that for Puts was at 15,000 SP (2.20mn)

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