

Morning Mantra

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

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MARKET COMMENTARY

Indian equity benchmarks ended with notable gains on Wednesday's trading session. Indian equity benchmarks made a gap-up opening as the Organization for Economic Co-operation and Development (OECD) raised the projection for India's economic growth rate by 4.7 percentage points at 12.6 per cent for 2021-22. That would enable India to retain its earlier tag of the fastest growing large economy in the world. Adding more optimism among traders, CRISIL projected India's economy to grow by 11 per cent in the next fiscal year against expected contraction of 8 per cent in 2020-21.

In late morning deals, markets cut most of their gains, amid reports that a majority of CFOs interviewed see the long-term and financial impact of the global pandemic as one of their top challenges over the next three years. According to a survey, the most pressing issue at hand for CFOs (chief financial officers) is long-term business and financial impact of global pandemic, with almost 80 per cent of respondents listing this as their top challenge over the next three years. Besides, India reported 16,846 fresh Covid-19 cases on Wednesday pushing the overall tally to 11,261,470, according to Worldometer. The death toll from the deadly infection jumped to 158,079.

However, in the second half of the session, indices regained momentum to end on a higher note. Sentiments were positive, as CRISIL in its report stated that the production-linked incentive (PLI) scheme that seeks to push domestic manufacturing in as many as 14 sectors has the potential to generate additional revenue worth Rs 35-40 lakh crore over the next five years. Some support also came with private report stated that India's economy should come roaring back to life in 2021 after a recession induced by COVID-19 and allow the country to reclaim its status as the fastest-growing major economy if the OECD projection of 12.6 per cent expansion in GDP is realised.

On the global front, European markets were trading mostly in green even after rising inflation. Asian markets ended mostly higher on Wednesday, as consumer prices in China were down 0.2 percent on year in February. The National Bureau of Statistics said that exceeded expectations for a decline of 0.4 percent and was up from -0.3 percent in the previous month. On a monthly basis, consumer prices climbed 0.6 percent - again beating forecasts for a gain of 0.4 percent but down from 1.0 percent a month earlier.

MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	51279.51	254.03	0.50
NIFTY	15174.80	76.40	0.51
MIDCAP	20669.92	157.70	0.77
SMLCAP	21180.25	198.61	0.95
BSEFMC	12343.31	70.06	0.57
AUTO	23831.80	205.45	0.87
POWER	2495.68	-5.58	-0.22
REALTY	2805.30	19.49	0.70
BSE IT	26305.25	408.26	1.58
BANKEK	40514.30	57.08	0.14
OIL GAS	15871.03	-148.74	-0.93
METAL	13994.97	250.43	1.82
INDIA VIX	20.75	-1.75	-7.76

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	1078	853	95
BSE	1629	1350	178

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	3910	4974	(21)
NSE CASH	54795	71527	(23)
NSE F&O	7255789	4687496	55

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	41.33	4.30	1.05
SENSEX	35.94	3.48	0.70

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	4060	3612	448
FII	6535	6551	(16)

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	3490.76	3403.26	88
Index Options	689855.38	684433.44	5422
Stock Futures	10071.23	10236.83	(166)
Stock Options	11413.57	11396.29	17

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.12	1.11
BANK NIFTY	0.81	0.86

SECURITIES BAN FOR TRADE IN F&O FOR 12-03-2021

BANKBARODA
PNB
SAIL
SUNTV

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.247	6.206	0.66
USA	1.561	1.544	1.11

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DX	92.04	91.95	0.09

CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
26-Mar-21 USD-INR	73.14	-	-
26-Mar-21 EUR-INR	87.04	-0.11	-0.13
26-Mar-21 GBP-INR	101.52	-0.02	-0.02
26-Mar-21 JPY- INR	67.26	-0.06	-0.09

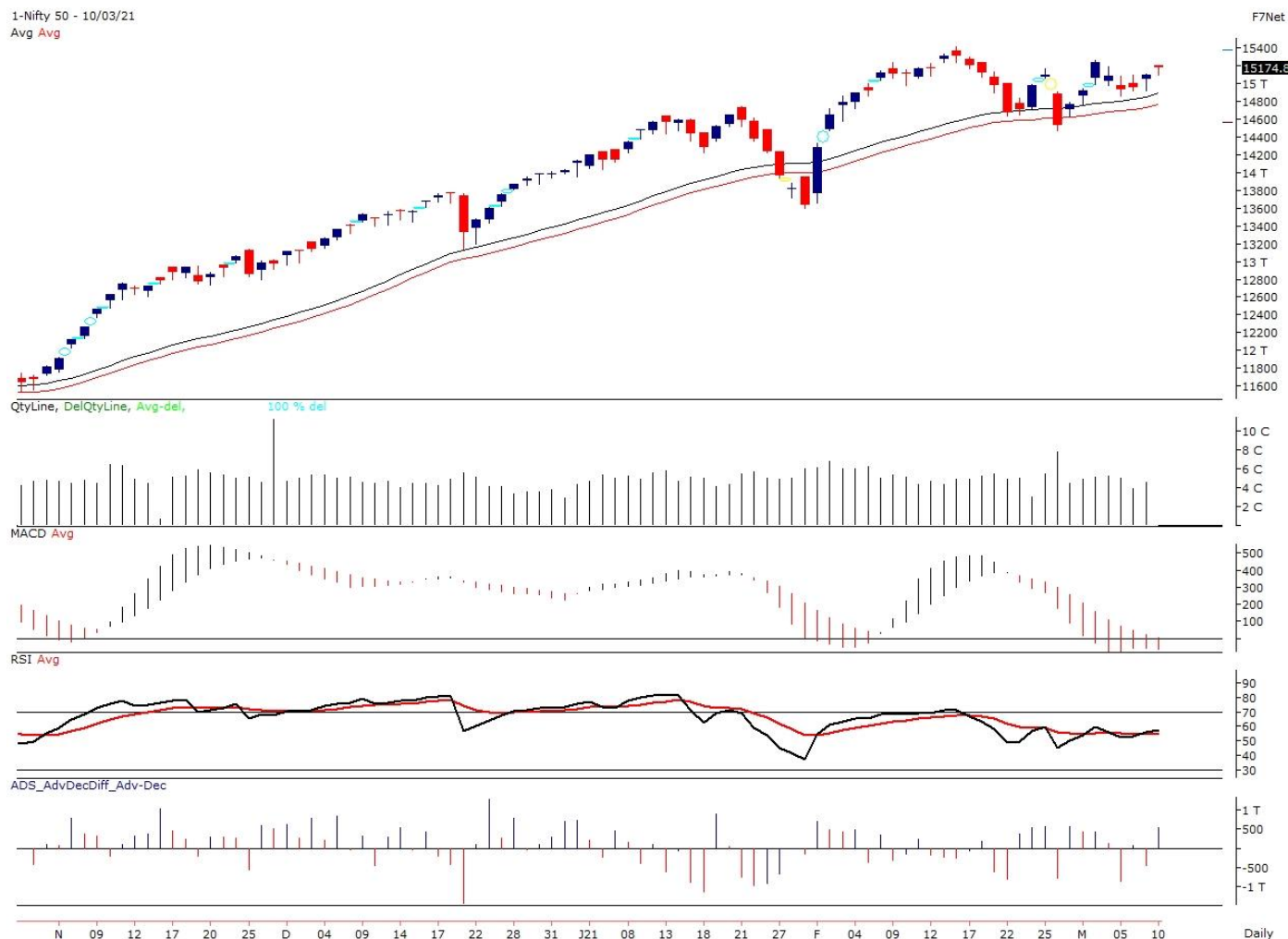
KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1717.147	1.50	0.10
Silver	26.01	0.08	0.27
Crude-Oil	64.28	0.29	0.44
Brent-Crude	67.82	0.30	0.44

INDEX TREND ANALYSIS

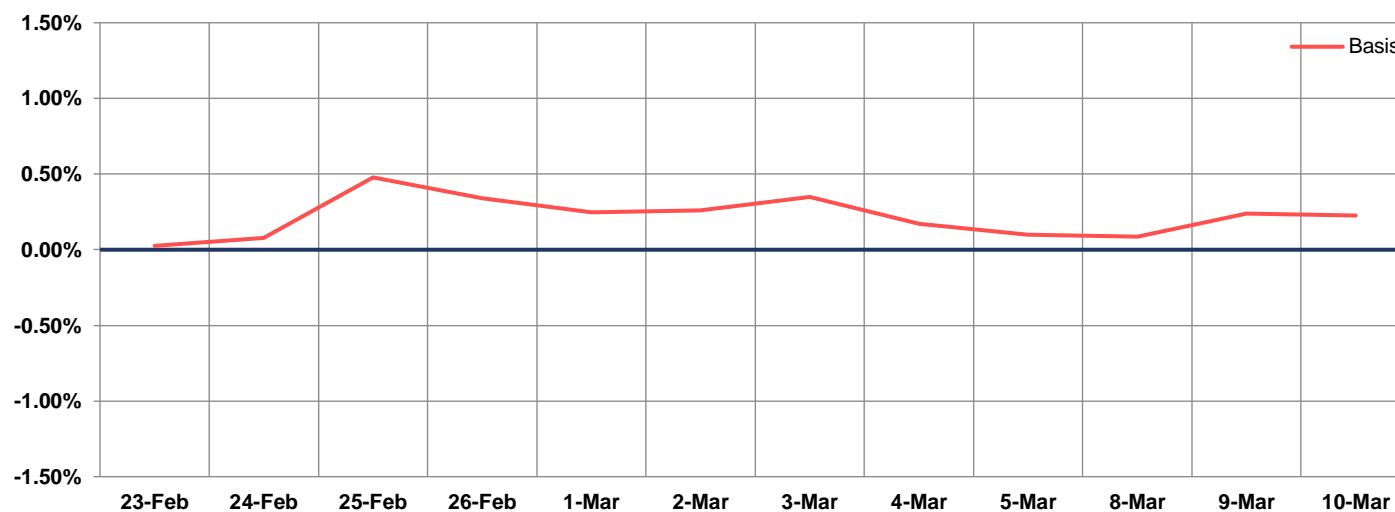
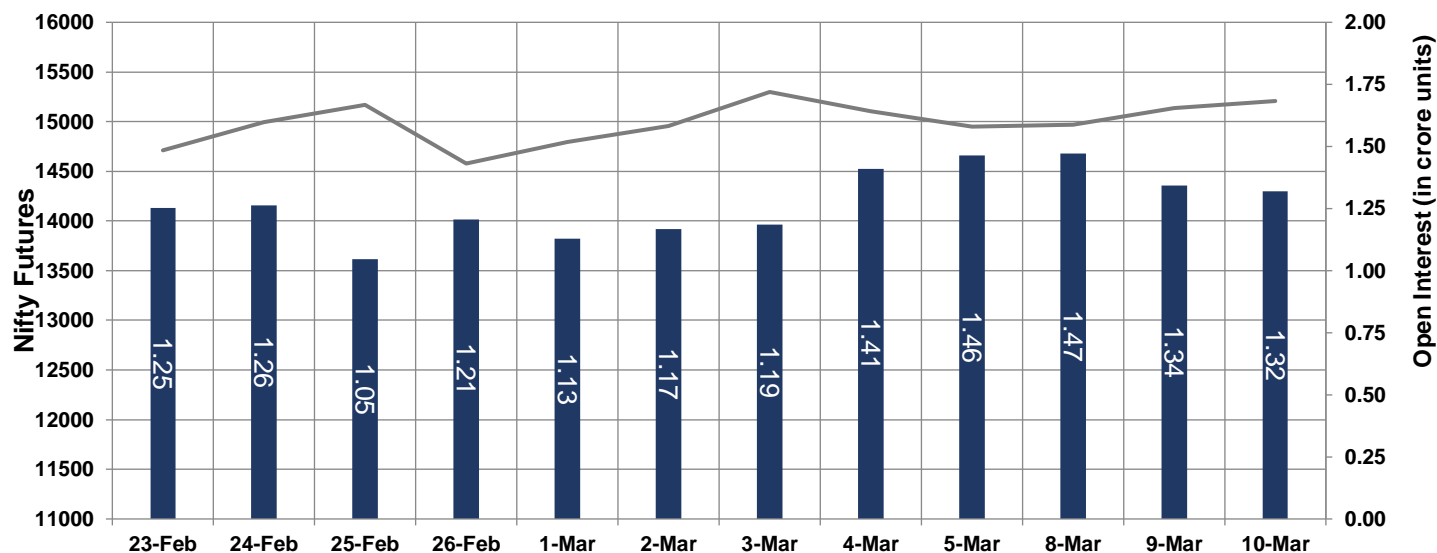
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	15175	15047	15111	15165	15229	15282	Buy	Buy	Buy
SENSEX	51280	50871	51075	51253	51457	51634	Buy	Buy	Buy
NIFTY FUTURES	15203	15068	15135	15199	15266	15330	Buy	Buy	Buy
BANK NIFTY	35938	35547	35743	35960	36155	36372	Buy	Buy	Buy
CNX IT	26010	25622	25816	25976	26170	26331	Neutral	Buy	Buy
CNX MIDCAP	24220	23982	24101	24194	24313	24406	Neutral	Buy	Buy
CNX SMALLCAP	8439	8333	8386	8416	8469	8499	Neutral	Buy	Buy
INDIA VIX	20.75	17.67	19.21	20.86	22.39	24.04	Sell	Buy	Buy

NIFTY TECHNICAL & INDICES LEVEL

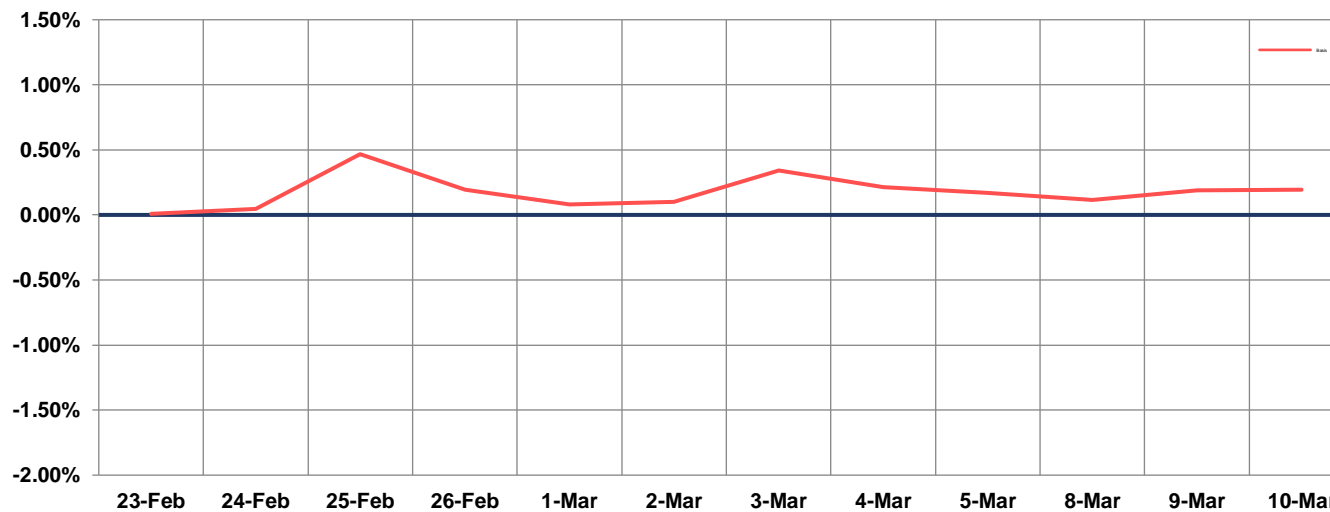
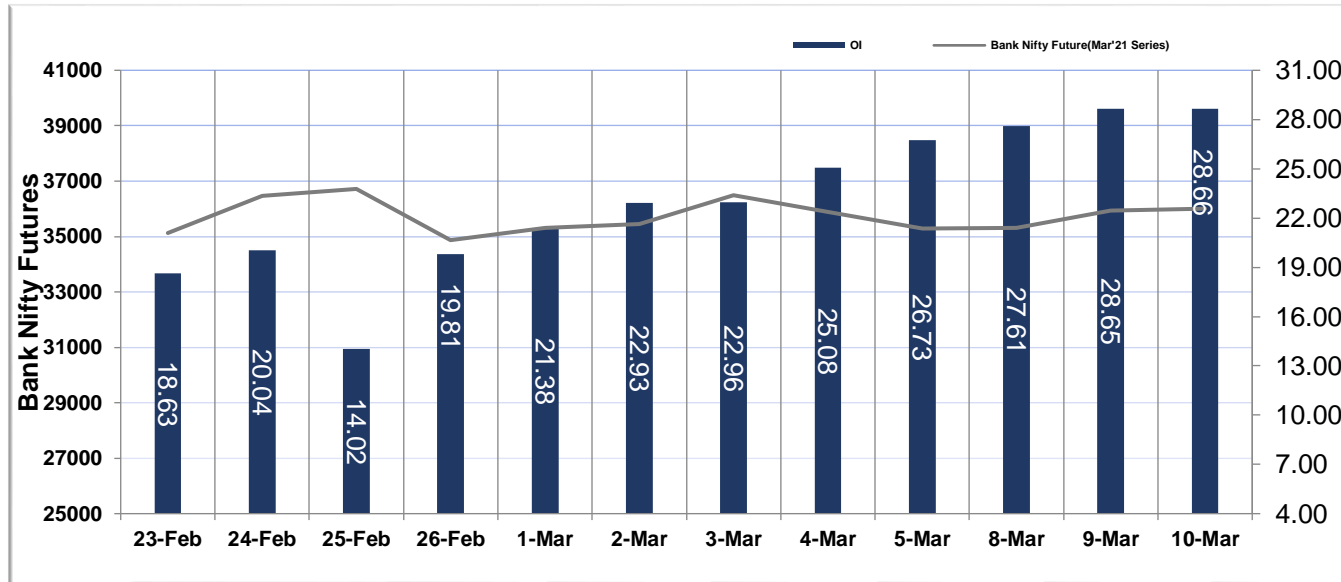


- Nifty Cash prices have settled at **15174.80** up by 0.51 percent from the previous close. On the upper side it has resistance of **15220** and **15430** levels, while lower side it has support of **15040** and **14935** levels. Intraday traders should be cautious and take position accordingly.

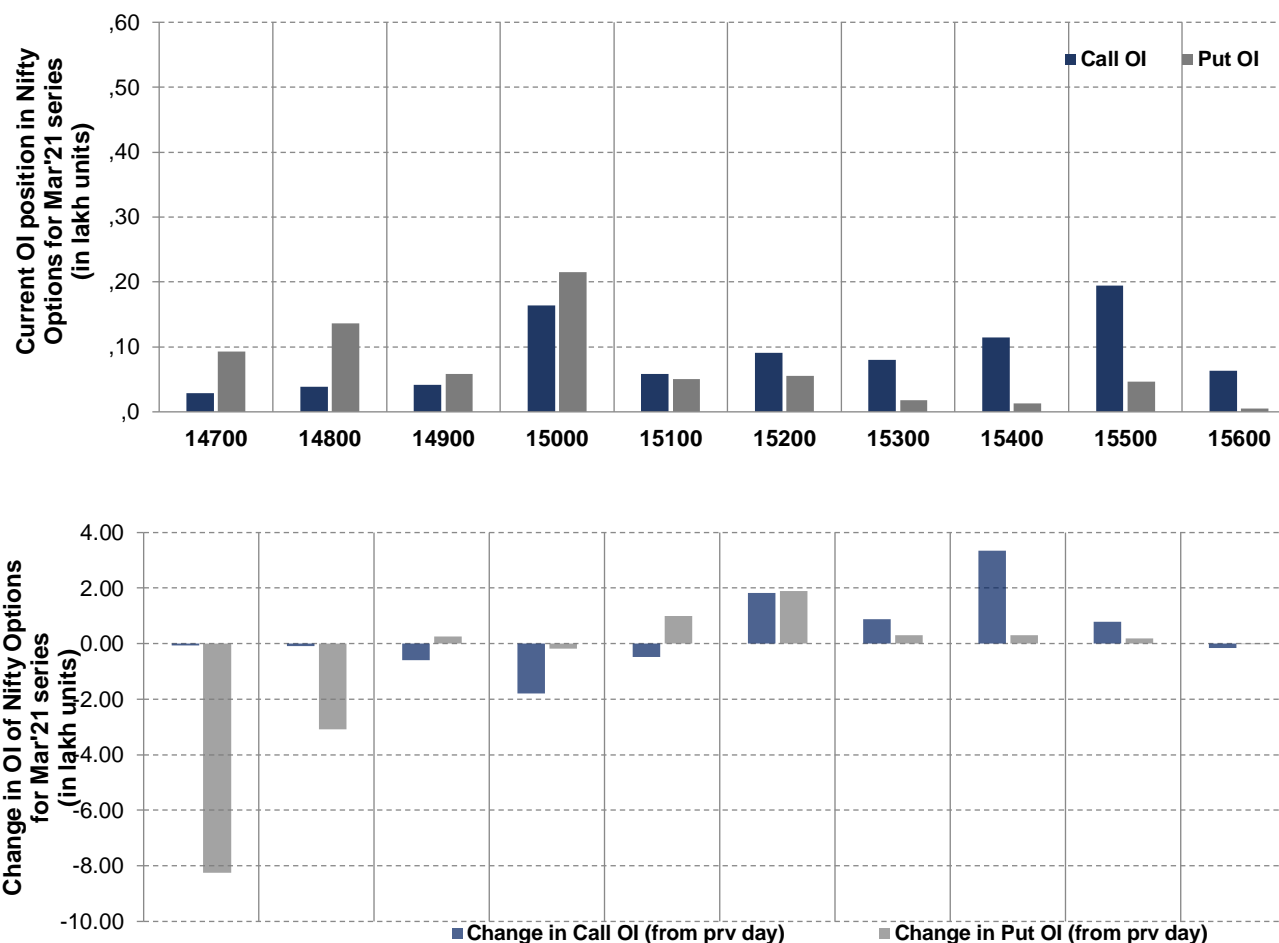
NIFTY FUTURES



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 0.08 million in open interests.
- Among Nifty puts 15,000 SP from the March month expiry was the most active put with a reduction of 0.02 million in open interests.
- The maximum OI outstanding for Calls was at 15,500 SP (1.94mn) and that for Puts was at 15,000 SP (2.15mn)

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