
Morning Mantra

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

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MARKET COMMENTARY

Indian equity benchmarks ended in red on Friday. The start of the day was on a positive note, taking support with PHD Chamber of Commerce and Industry report showing that as economic activities gather pace and investor sentiments revive, GDP growth is likely to enter a double-digit growth trajectory and may grow at more than 11 per cent in the next financial year. Some support also came with Commerce Secretary Anup Wadhawan's statement that the country's exports are steadily recovering and it is expected to record a healthy growth rate in March.

Positive trade continued over the Dalal Street during the first half of the trading session, as domestic sentiments were optimistic, after the Minister of State for Labour and Employment Santosh Kumar Gangwar said that the Centre is providing fiscal stimulus of more than Rs 27 lakh crore as part of the Aatmanirbhar financial package. Gangwar said that the government increasing public expenditure on various schemes run by the Ministry of Micro, Small and Medium Enterprises, Ministry of Rural Development and Ministry of Housing and Urban Affairs.

But in the second half of the session, indices turned negative to end lower, amid SBI report stating that India's combined federal and states' budget gap in the current fiscal year will reach 12.7% on increased healthcare spending and a collapse in revenue amid the pandemic. Besides, India reported 21,668 fresh Covid-19 cases on Thursday pushing the overall tally to 11,305,979, according to Worldometer. The death toll from the deadly infection jumped to 158,326. The country continues to be second-most-affected globally, and ranks 11th among worst-hit nations by active cases.

On the global front, European markets were trading lower, as a rise in Treasury yields resurfaced some investor caution. Asian markets ended mostly higher on Friday, after producer prices in Japan were up 0.4 percent on month in February. The Bank of Japan said that was shy of expectations for an increase of 0.5 percent and was unchanged from the January reading. On a yearly basis, producer prices sank 0.7 percent - in line with expectations following the 1.6 percent decline in the previous month. Export prices were up 1.4 percent on month and 0.3 percent on year, the bank said, while import prices jumped 4.1 percent on month but lost 3.5 percent on year.

MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	50792.08	-487.43	-0.95
NIFTY	15030.95	-143.85	-0.95
MIDCAP	20577.21	-92.71	-0.45
SMLCAP	21209.07	28.82	0.14
BSEFMC	12230.44	-112.87	-0.91
AUTO	23451.32	-380.48	-1.60
POWER	2514.15	18.47	0.74
REALTY	2785.16	-20.14	-0.72
BSE IT	26283.54	-21.71	-0.08
BANKEX	39995.58	-518.72	-1.28
OIL GAS	15890.90	19.87	0.13
METAL	13871.57	-123.40	-0.88
INDIA VIX	21.70	0.96	4.61

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	786	1176	82
BSE	1352	1656	177

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	9783	3910	150
NSE CASH	67368	54795	23
NSE F&O	2789169	7255789	(62)

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	40.94	4.26	1.06
SENSEX	35.36	3.42	0.71

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	4790	4954	(164)
FII	12081	13023	(943)

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	5456.59	6042.61	(586)
Index Options	339088.30	337198.92	1889
Stock Futures	11769.37	13126.12	(1357)
Stock Options	15096.60	15207.40	(111)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.02	1.12
BANK NIFTY	0.67	0.81

SECURITIES BAN FOR TRADE IN F&O FOR 15-03-2021

BHEL
PNB
SAIL
SUNTV

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.231	6.247	-0.26
USA	1.611	1.527	5.48

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	91.66	91.42	0.27

CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
26-Mar-21 USD-INR	72.90	-0.25	-0.34
26-Mar-21 EUR-INR	87.06	-0.11	-0.13
26-Mar-21 GBP-INR	101.45	-0.11	-0.10
26-Mar-21 JPY- INR	66.89	-0.39	-0.58

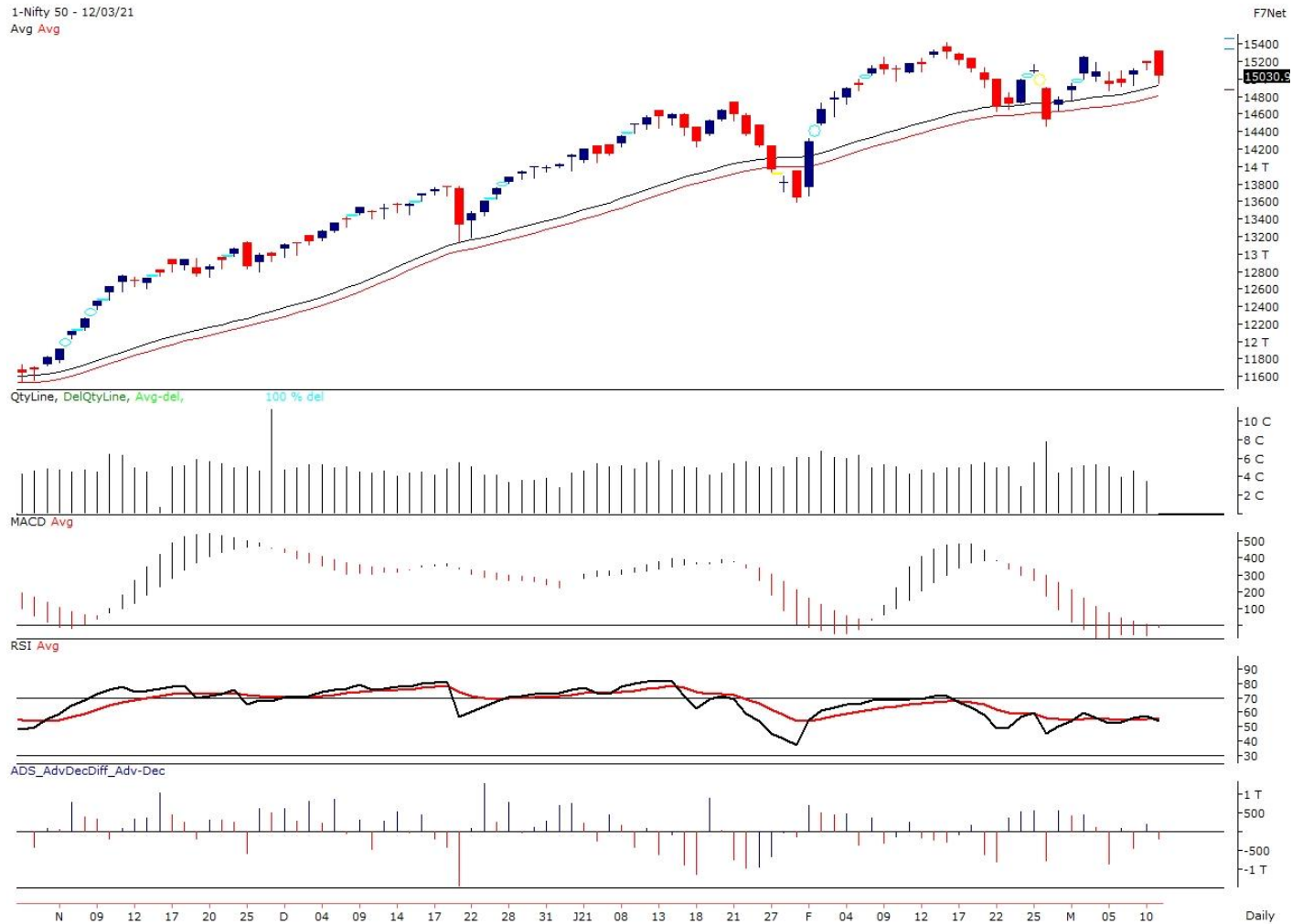
KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1724.90	2.23	0.13
Silver	25.83	-0.25	-0.94
Crude-Oil	65.58	-0.44	-0.67
Brent-Crude	69.23	-0.40	-0.57

INDEX TREND ANALYSIS

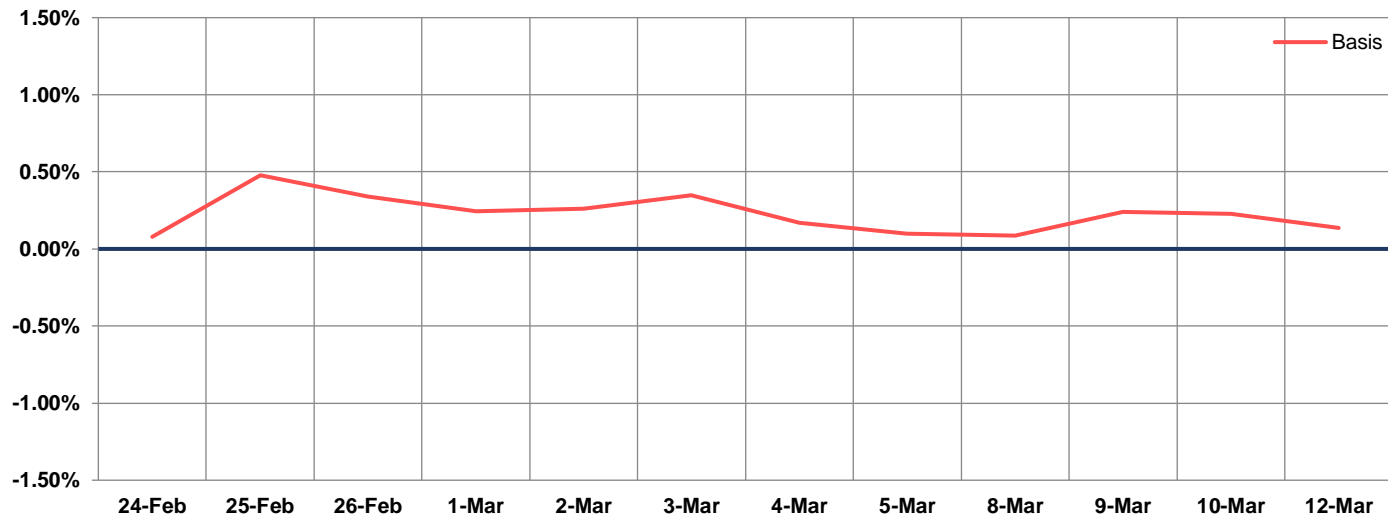
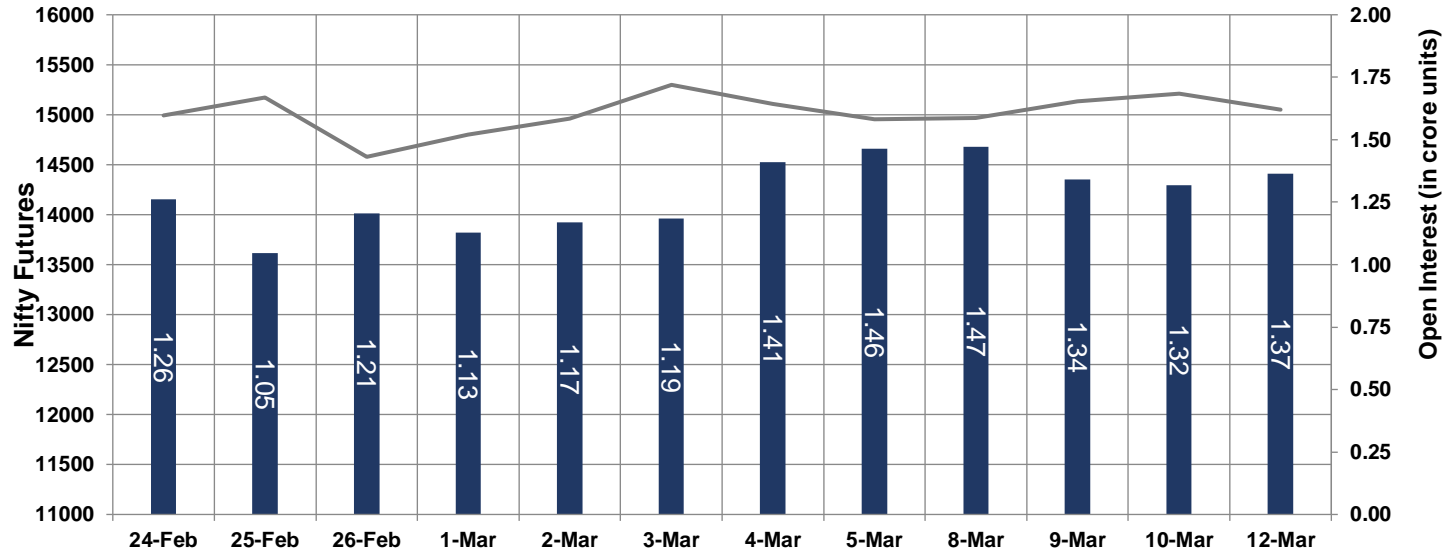
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	15031	14724	14878	15107	15260	15490	Neutral	Buy	Buy
SENSEX	50792	49767	50280	51051	51563	52334	Neutral	Buy	Buy
NIFTY FUTURES	15036	14711	14874	15124	15287	15538	Neutral	Buy	Buy
BANK NIFTY	35497	34418	34957	35727	36267	37037	Neutral	Buy	Buy
CNX IT	25888	25524	25706	26002	26184	26480	Buy	Buy	Buy
CNX MIDCAP	24116	23720	23918	24200	24397	24679	Neutral	Buy	Buy
CNX SMALLCAP	8483	8347	8415	8486	8554	8625	Buy	Buy	Buy
INDIA VIX	21.71	16.84	19.27	20.97	23.41	25.10	Sell	Neutral	Buy

NIFTY TECHNICAL & INDICES LEVEL

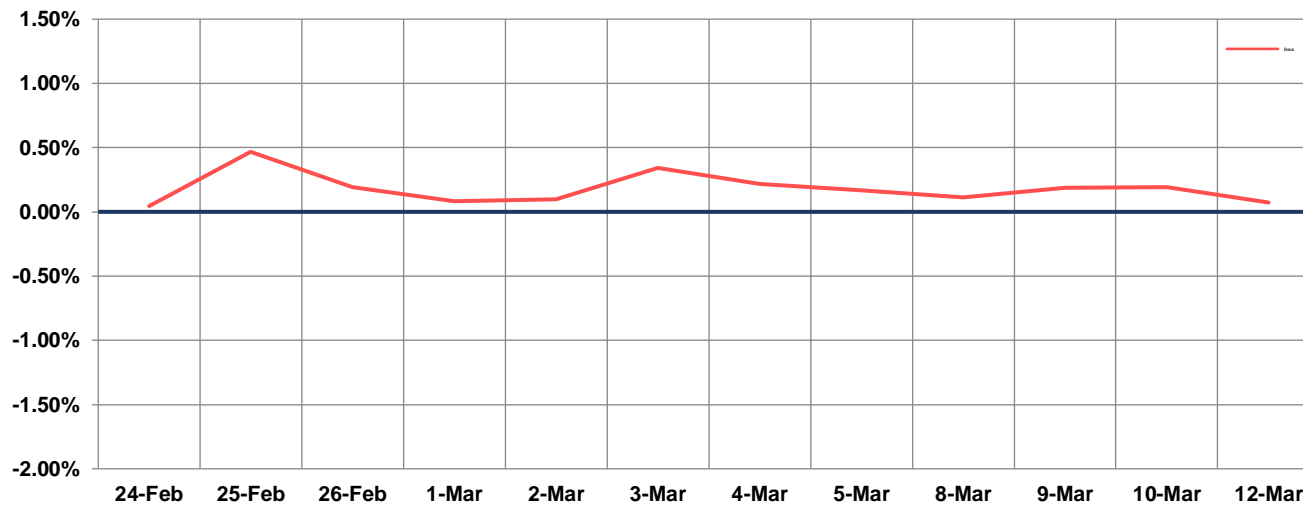
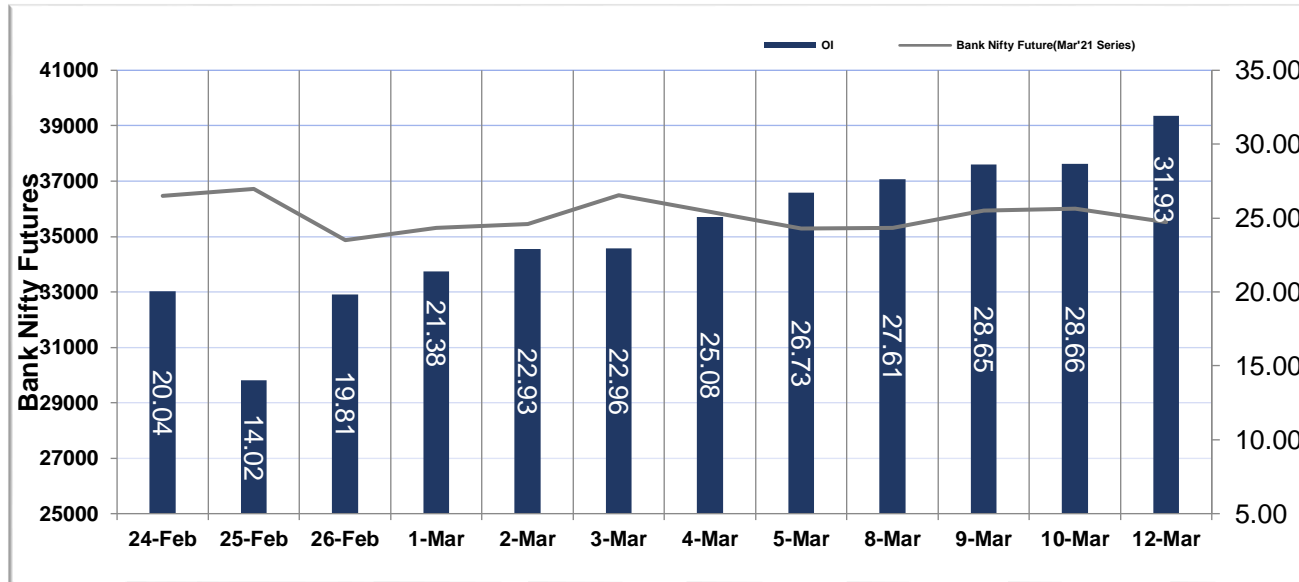


➤ Nifty Cash prices have settled at **15030.95** down by 0.95 percent from the previous close. On the upper side it has resistance of **15180** and **15290** levels, while lower side it has support of **14930** and **14790** levels. Intraday traders should be cautious and take position accordingly.

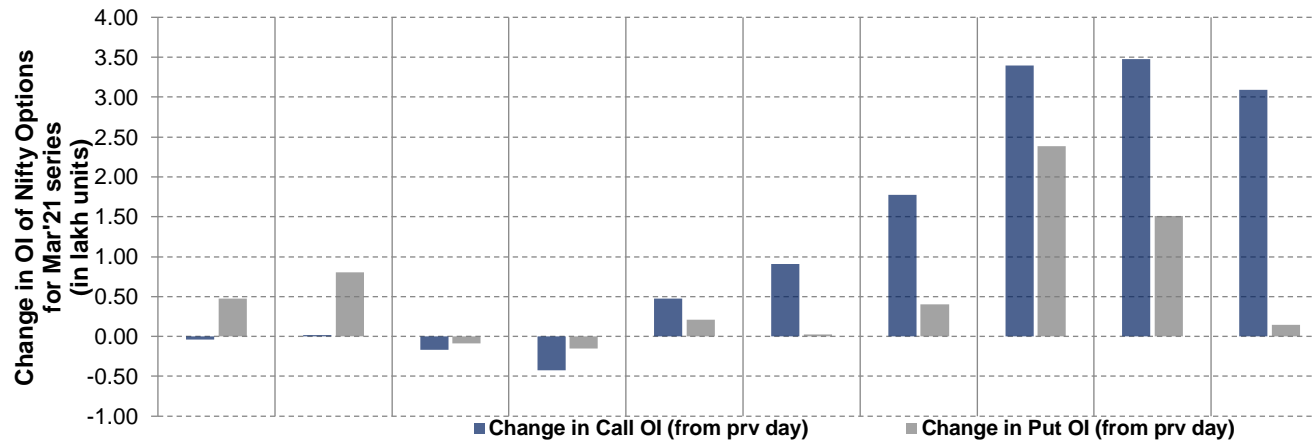
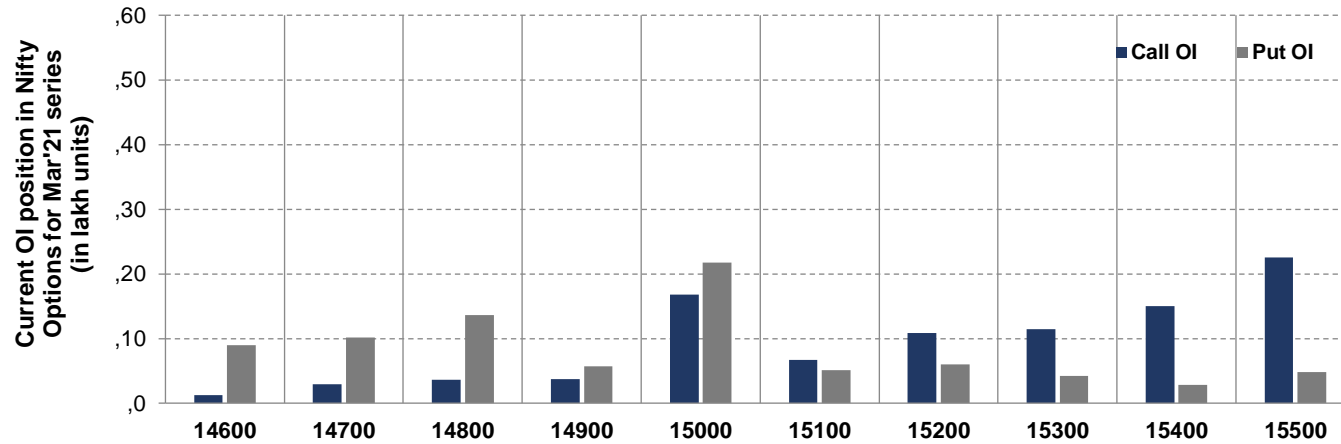
NIFTY FUTURES



BANK NIFTY FUTURES



NIFTY OPTIONS



- Among Nifty calls 15,500 SP from the March month expiry was the most active call with an addition of 0.31 million in open interests.
- Among Nifty puts 15,000 SP from the March month expiry was the most active put with an addition of 0.02 million in open interests.
- The maximum OI outstanding for Calls was at 15,500 SP (2.25mn) and that for Puts was at 15,000 SP (2.20mn)

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