

Morning Mantra

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

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MARKET COMMENTARY

Indian equity benchmarks ended flat with a negative bias on Tuesday. Key indices made a positive start of the day, taking support with the government data showing that the country's exports rose marginally by 0.67 per cent year-on-year to \$27.93 billion in February, growing for the third consecutive month, even as trade deficit widened to \$12.62 billion. Imports rose by 6.96 per cent to \$40.54 billion in the month. Indices remained higher in the first half of the session, as the finance ministry said it has released the full Rs 1.10 lakh crore estimated GST compensation shortfall to the states with the release of final weekly installment of Rs 4,104 crore. With the release of the 20th installment, 100 per cent of the total estimated GST compensation shortfall of Rs 1.10 lakh crore for the year 2020-21 has now been released to the states and UTs with Legislative Assembly. Out of this, an amount of Rs 1,01,329 crore has been released to the states and an amount of Rs 8,879 crore has been released to the three UTs with Legislative Assembly.

However, markets cut gains during the second half of the trading session to trade volatile and finally ended the day in red terrain, amid Credit rating agency ICRA's report stated that the states may face a shortfall of Rs 2.7-3 lakh crore as Goods and Services Tax (GST) compensation from the Centre next fiscal. Out of that amount, the shortfall from cess collections will be at Rs 1.6-2 lakh crore. Sentiments were negative, as India reported 24,366 fresh Covid-19 cases on Monday pushing the overall tally to 11,409,524, according to Worldometer. The death toll from the deadly infection jumped to 158,892. Besides, a report stated that Cinema halls, hotels, restaurants and offices except those related to health and essential services in Maharashtra will function at 50 percent capacity till March 31.

On the global front, European markets were trading higher, as German online fashion retailer Zalando and carmaker Volkswagen jumped following upbeat earnings forecasts, while investors awaited the U.S. Federal Reserve's views on a recent pick-up in inflation. Asian markets finished mostly in green on Tuesday, after export prices in South Korea were up 3.1 percent on year in February, the Bank of Korea said on Tuesday - accelerating from 2.2 percent in January. On a yearly basis, export prices rose 0.2 percent after sinking 1.9 percent in the previous month. Individually, prices for agricultural, forestry and marine exports rose 0.7 percent on month and fell 7.0 percent on year. Manufactured product prices gained 3.1 percent on month and 0.2 percent on year.

MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	50363.96	-31.12	-0.06
NIFTY	14910.45	-19.05	-0.13
MIDCAP	20510.37	81.26	0.40
SMLCAP	21162.50	66.71	0.32
BSEFMC	12328.90	112.80	0.92
AUTO	23364.23	32.96	0.14
POWER	2542.07	3.21	0.13
REALTY	2755.64	-17.64	-0.64
BSE IT	26725.49	355.06	1.35
BANKEK	39222.14	-407.57	-1.03
OIL GAS	15717.68	-62.23	-0.39
METAL	13986.58	-91.85	-0.65
INDIA VIX	20.19	-1.04	-4.89

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	915	1023	98
BSE	1466	1497	175

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	3700	4824	(23)
NSE CASH	59127	60062	(2)
NSE F&O	3456033	3262881	6

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	40.61	4.23	1.07
SENSEX	35.17	3.41	0.71

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	4519	5687	(1169)
FII	7820	6128	1692

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	4302.00	4026.84	275
Index Options	473947.92	474653.46	(706)
Stock Futures	10788.46	10495.50	293
Stock Options	14001.58	14238.28	(237)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	0.92	0.93
BANK NIFTY	0.59	0.69

SECURITIES BAN FOR TRADE IN F&O FOR 17-03-2021

BHEL
SUNTV

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.180	6.201	-0.34
USA	1.600	1.607	-0.41

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	91.86	91.83	0.03

CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
26-Mar-21 USD-INR	72.62	-0.002	-0.003
26-Mar-21 EUR-INR	86.83	0.13	0.15
26-Mar-21 GBP-INR	100.65	-0.50	-0.49
26-Mar-21 JPY- INR	66.61	-0.02	-0.03

KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1738.16	7.41	0.43
Silver	26.09	-0.12	-0.47
Crude-Oil	64.21	-1.14	-1.74
Brent-Crude	67.86	-1.02	-1.48

INDEX TREND ANALYSIS

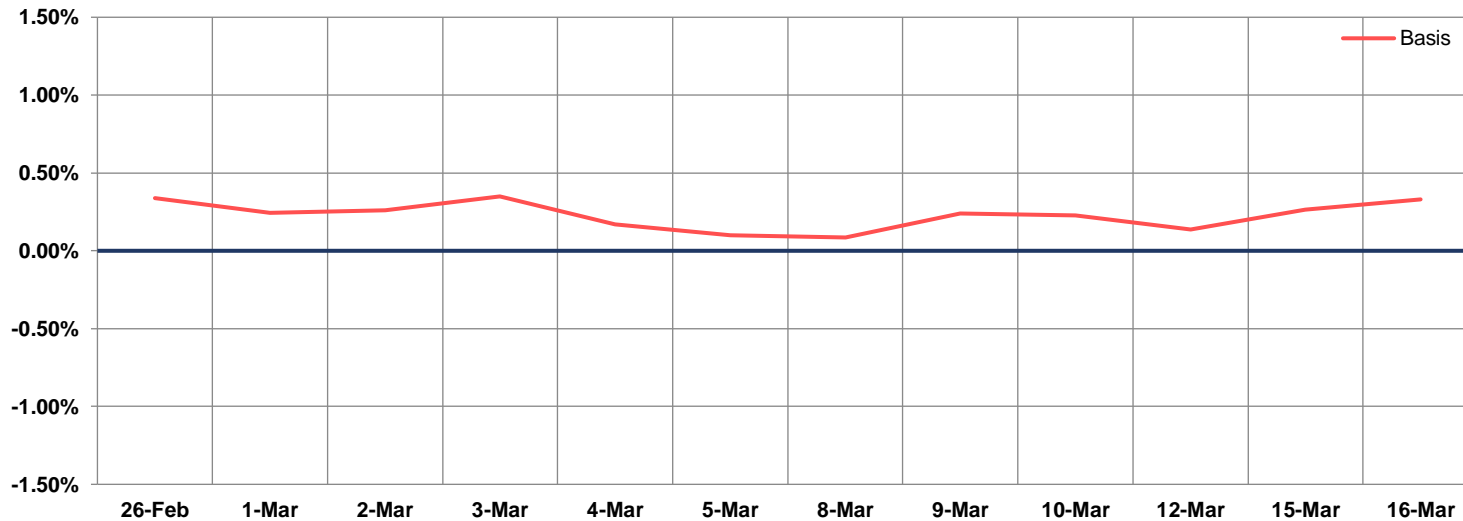
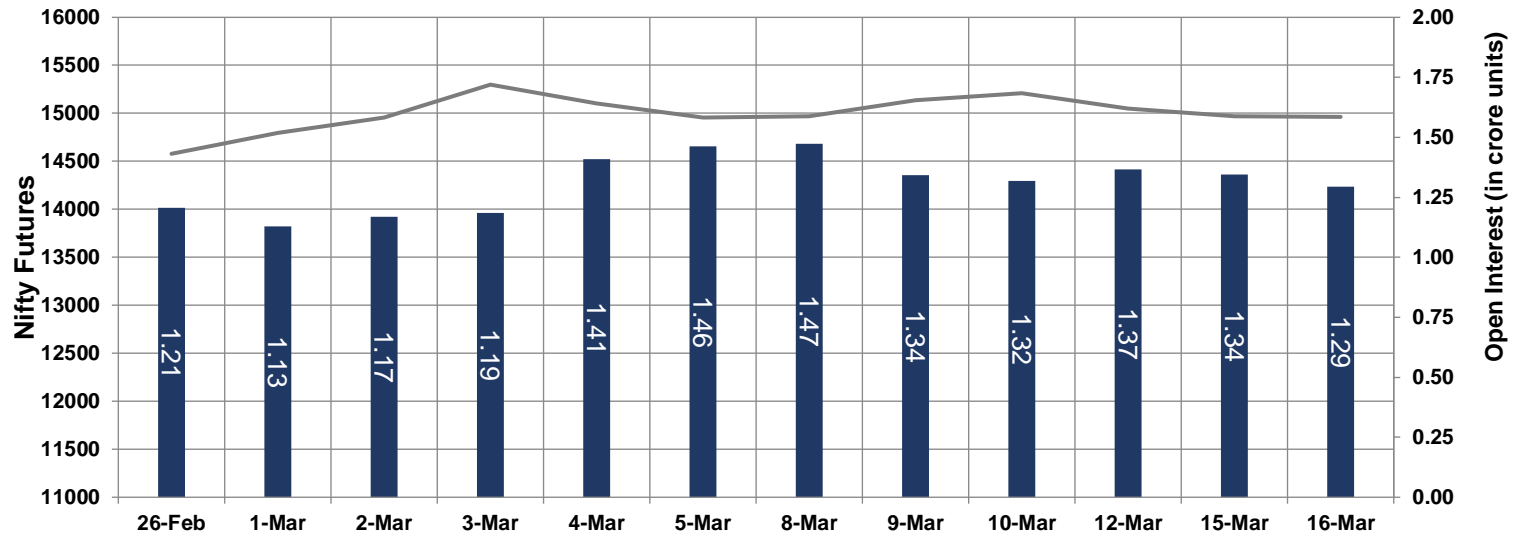
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	14910	14790	14850	14951	15011	15112	Neutral	Buy	Buy
SENSEX	50364	49935	50150	50504	50718	51072	Neutral	Buy	Buy
NIFTY FUTURES	14975	14824	14899	14991	15066	15158	Neutral	Buy	Buy
BANK NIFTY	34805	34324	34564	34985	35225	35645	Neutral	Buy	Buy
CNX IT	26364	25868	26116	26359	26607	26851	Buy	Buy	Buy
CNX MIDCAP	24048	23837	23943	24029	24135	24222	Neutral	Buy	Buy
CNX SMALLCAP	8441	8369	8405	8442	8478	8515	Buy	Buy	Buy
INDIA VIX	20.19	16.66	18.42	19.83	21.59	23.00	Sell	Neutral	Buy

NIFTY TECHNICAL & INDICES LEVEL

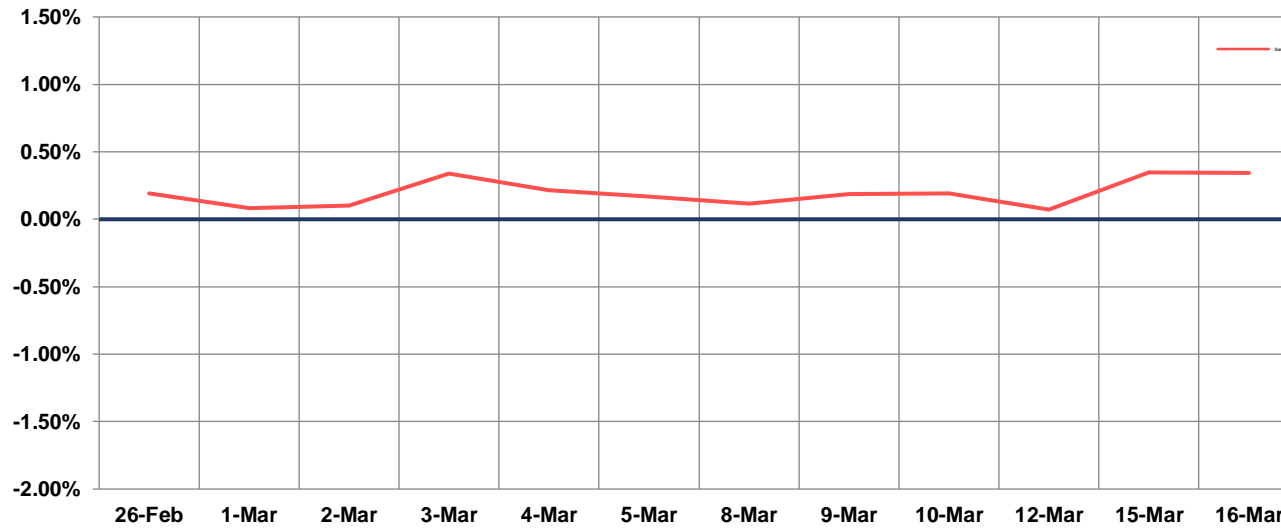
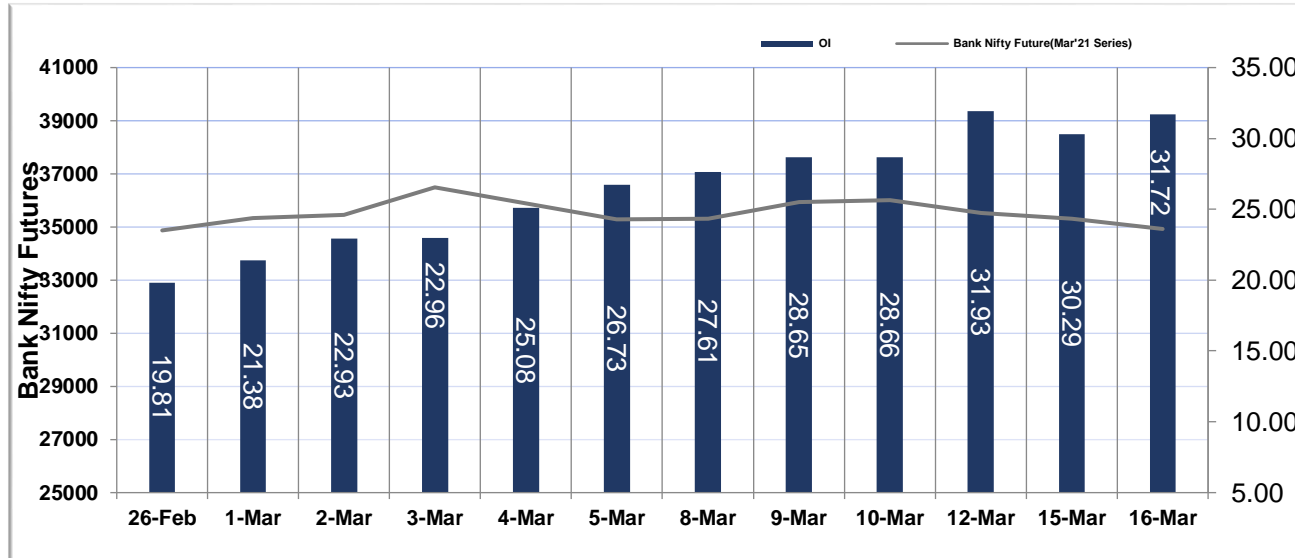


- Nifty Cash prices have settled at **14910.45** down by 0.13 percent from the previous close. On the upper side it has resistance of **15090** and **15170** levels, while lower side it has support of **14790** and **14640** levels. Intraday traders should be cautious and take position accordingly.

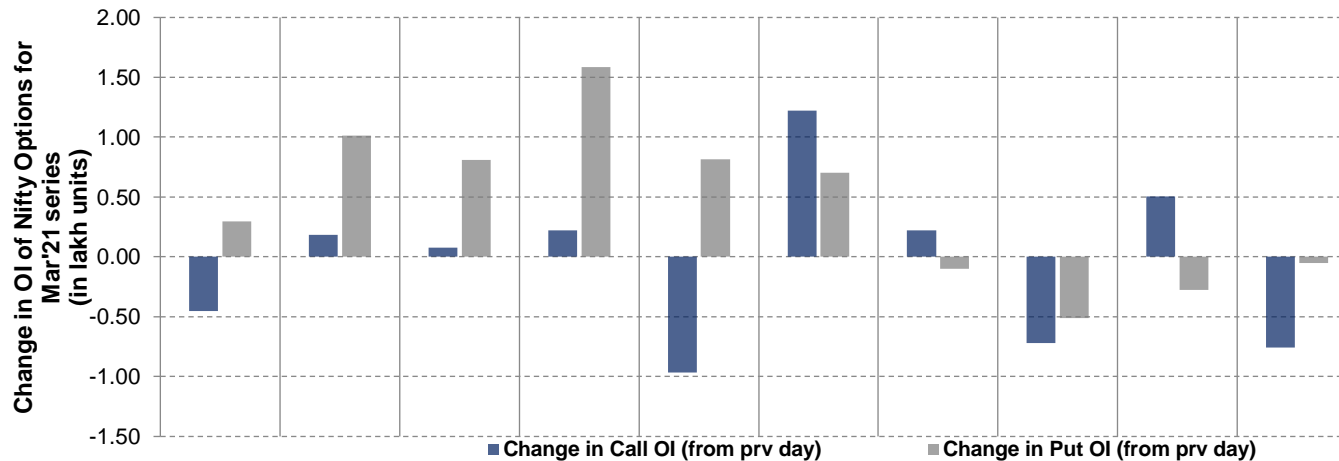
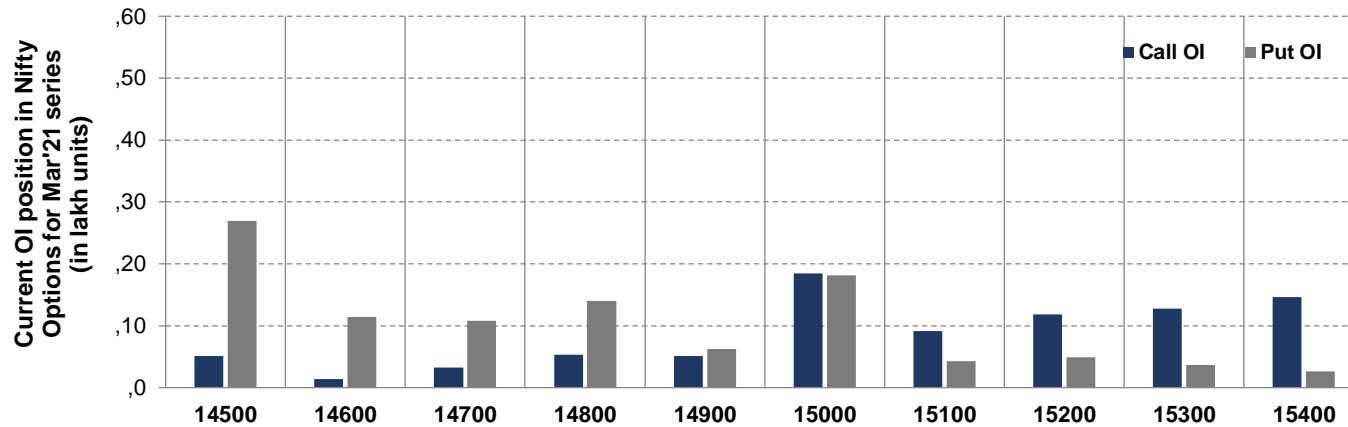
NIFTY FUTURES



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 0.12 million in open interests.
- Among Nifty puts 14,500 SP from the March month expiry was the most active put with an addition of 0.03 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 (2.70mn)

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