

Morning Mantra

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

ISO 9001 : 2015 Certified



Table of Contents

Page No.	Particulars
1	Market Commentary
2	Market Summary and Numbers that matter
3	G-Sec Yields, Currency Futures, Dollar Index, Key Commodities Tracker & Index Trend Analysis
4	Nifty Technical
5	Nifty Futures
6	Bank Nifty Futures
7	Nifty Options
8	Disclaimer

MARKET COMMENTARY

Indian equity benchmarks ended in deep red on Wednesday. After a cautious start, markets traded in green terrain, taking support with the commerce ministry's preliminary data stating that India's exports grew 17.27 per cent to \$14.22 billion during March 1-14 as compared to the year-ago period, showing healthy signs of revival. The key sectors which recorded a healthy growth in exports include engineering, rice, gems and jewellery. But soon, indices turned negative, as India reported 28,869 fresh Covid-19 cases on Tuesday pushing the overall tally to 11,438,464, according to Worldometer. The death toll from the deadly infection jumped to 159,079.

Benchmarks came back in green terrain during late morning deals, as traders got relief, after FM Nirmala Sitharaman informed Parliament that the Reserve Bank of India is taking measures to strengthen its regulatory and supervisory capacity, and expressed hope that these steps will ensure no regulatory mishaps take place in the future. Some support also came with reports that the retail industry's business is on the brink of full recovery as it achieved 93 per cent of the pre-COVID sales in February.

In afternoon deals, markets again traded in red terrain and witnessed sharp fall. Sentiments were pessimistic with India Ratings and Research (Ind-Ra) in its latest report stating that the performance of unsecured assets classes, such as microfinance loans, unsecured business loans and consumer loans, is worsening with deteriorating financial conditions of borrowers. For secured asset classes, it has a stable performance outlook given the recovery in the economy in FY22. Meanwhile, SEBI has issued guidelines aimed at addressing grievances of IPO investors, particularly those using the unified payment interface (UPI) for payments.

On the global front, European markets were trading lower as most investors stayed on the sidelines ahead of the U.S. Federal Reserve's policy decision, while German carmaker BMW jumped after forecasting significant profit growth in 2021. Asian markets ended mostly lower on Wednesday, even after the value of NODX in Singapore climbed a seasonally adjusted 8.2 percent on month in February. The Enterprise Singapore said that beat forecasts for a decline of 1.0 percent following the downwardly revised 6.9 percent increase in January (originally 7.0 percent). On a yearly basis, exports gained 4.2 percent - shy of expectations for 6.6 percent following the downwardly revised 12.7 percent increase in the previous month (originally 12.8 percent).

MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	49801.62	-562.34	-1.12
NIFTY	14721.30	-189.15	-1.27
MIDCAP	20043.70	-466.67	-2.28
SMLCAP	20713.58	-448.92	-2.12
BSEFMC	12270.42	-58.48	-0.47
AUTO	22947.61	-416.62	-1.78
POWER	2469.14	-72.93	-2.87
REALTY	2678.77	-76.87	-2.79
BSE IT	26589.95	-135.54	-0.51
BANEX	38602.27	-620.17	-1.58
OIL GAS	15211.87	-505.81	-2.26
METAL	13670.37	-316.21	-2.26
INDIA VIX	20.16	-0.03	-0.15

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	385	1579	56
BSE	795	2188	142

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	8460	3700	129
NSE CASH	59560	59127	1
NSE F&O	4245096	3456033	23

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	40.10	4.17	1.08
SENSEX	34.72	3.36	0.72

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	5874	6437	(562)
FII	9973	7347	2626

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	4868.20	4874.26	(6)
Index Options	547811.59	547159.34	652
Stock Futures	11478.77	11532.11	(53)
Stock Options	15453.94	15818.77	(365)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	0.87	0.92
BANK NIFTY	0.52	0.59

SECURITIES BAN FOR TRADE IN F&O FOR 18-03-2021

SUNTV

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.189	6.180	0.15
USA	1.664	1.623	2.51

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DX	91.86	91.83	0.04

CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
26-Mar-21 USD-INR	72.67	0.05	0.06
26-Mar-21 EUR-INR	86.52	-0.29	-0.33
26-Mar-21 GBP-INR	101.05	0.45	0.44
26-Mar-21 JPY- INR	66.60	0.01	0.01

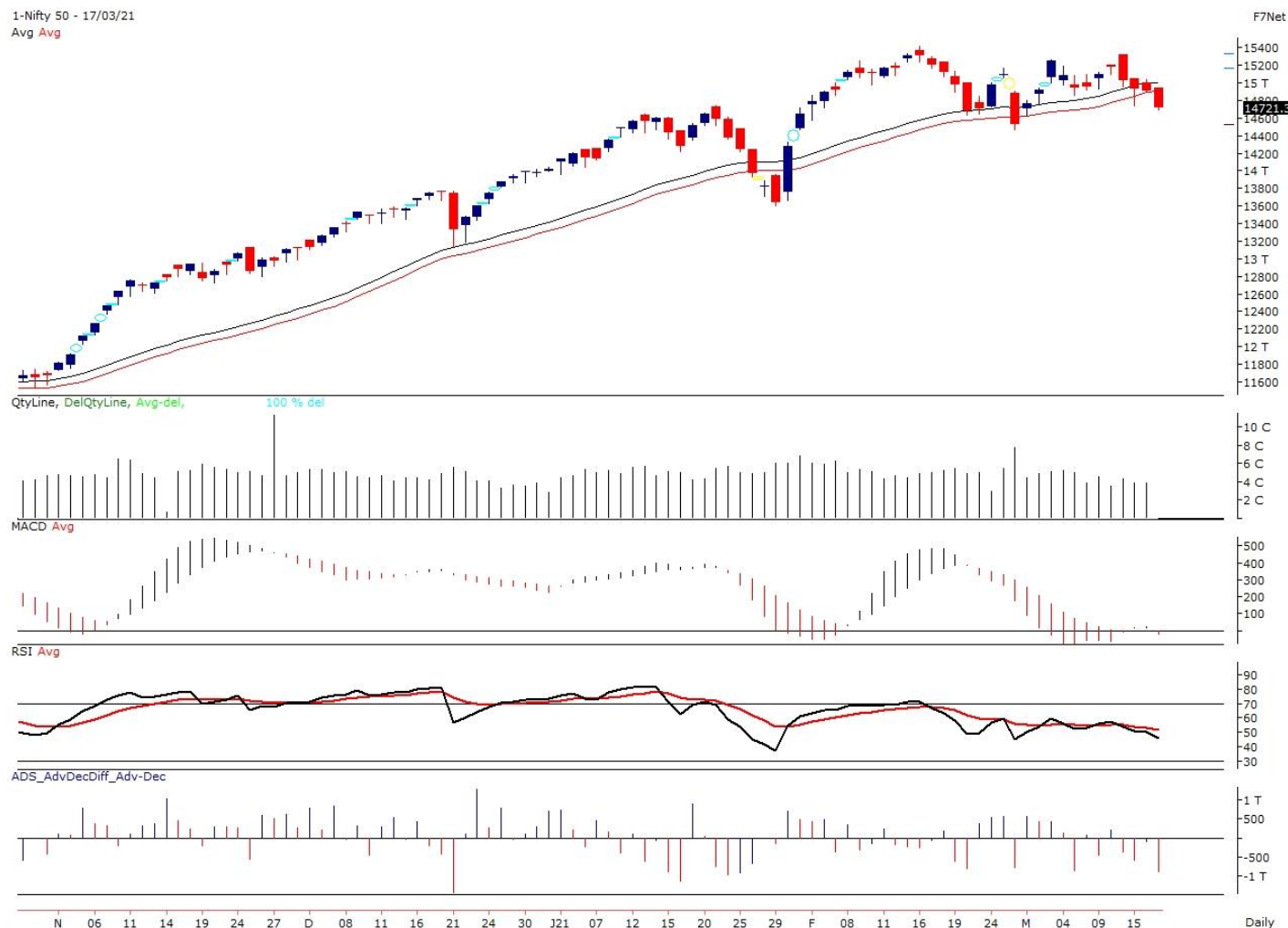
KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1732.86	1.22	0.07
Silver	26.05	0.12	0.52
Crude-Oil	64.38	-0.42	-0.63
Brent-Crude	67.87	-0.52	-0.77

INDEX TREND ANALYSIS

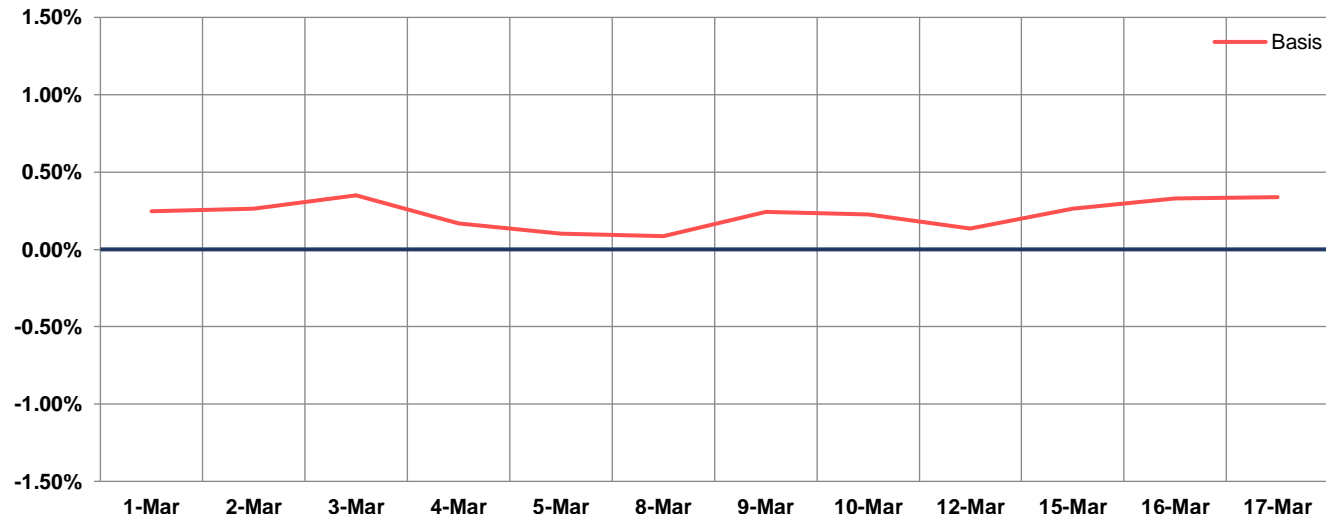
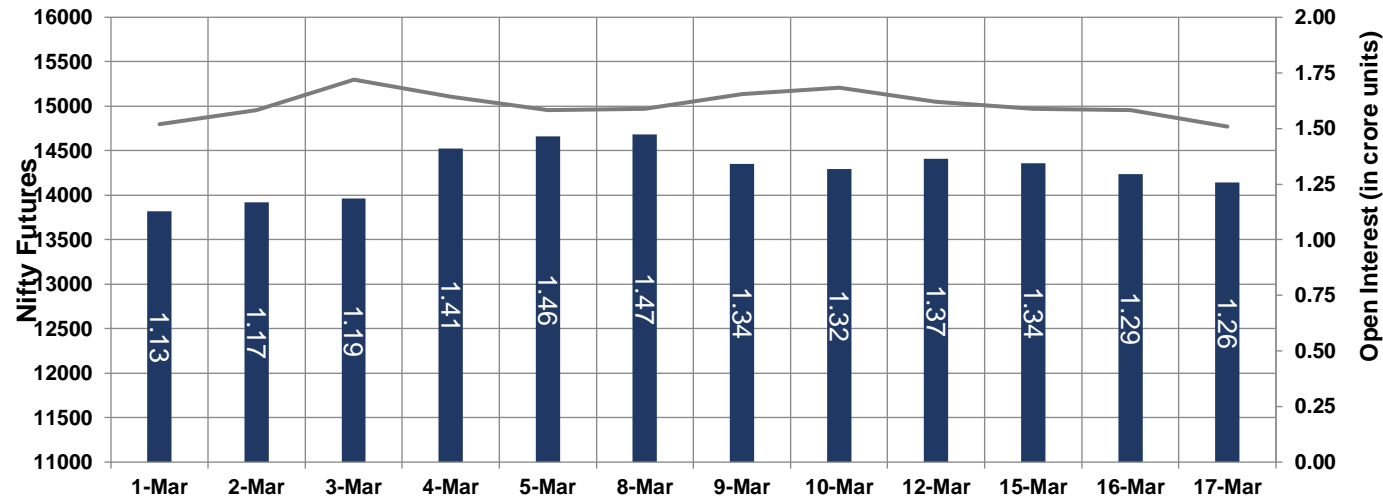
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	14721	14531	14626	14791	14887	15052	Neutral	Buy	Buy
SENSEX	49802	49185	49493	50027	50336	50870	Neutral	Buy	Buy
NIFTY FUTURES	14756	14586	14671	14826	14911	15066	Neutral	Buy	Buy
BANK NIFTY	34229	33512	33871	34486	34844	35459	Neutral	Buy	Buy
CNX IT	26184	25775	25979	26318	26522	26861	Buy	Buy	Buy
CNX MIDCAP	23452	22915	23183	23661	23929	24406	Neutral	Buy	Buy
CNX SMALLCAP	8255	8075	8165	8324	8414	8573	Neutral	Buy	Buy
INDIA VIX	20.16	17.93	19.05	19.73	20.85	21.53	Sell	Neutral	Buy

NIFTY TECHNICAL & INDICES LEVEL

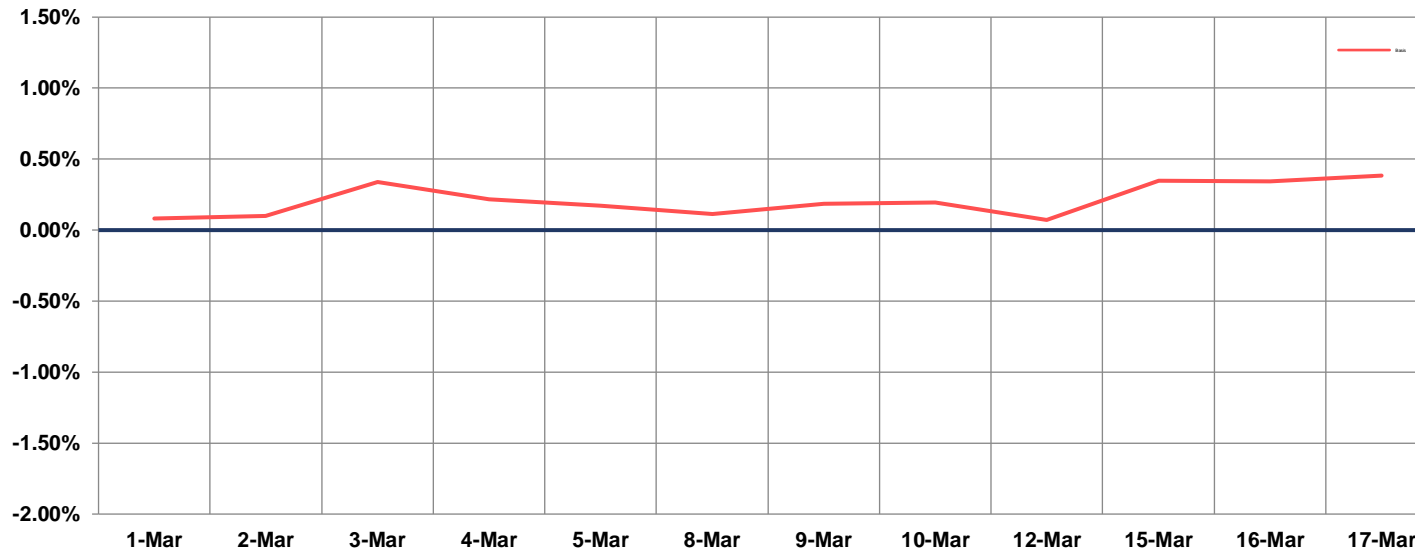
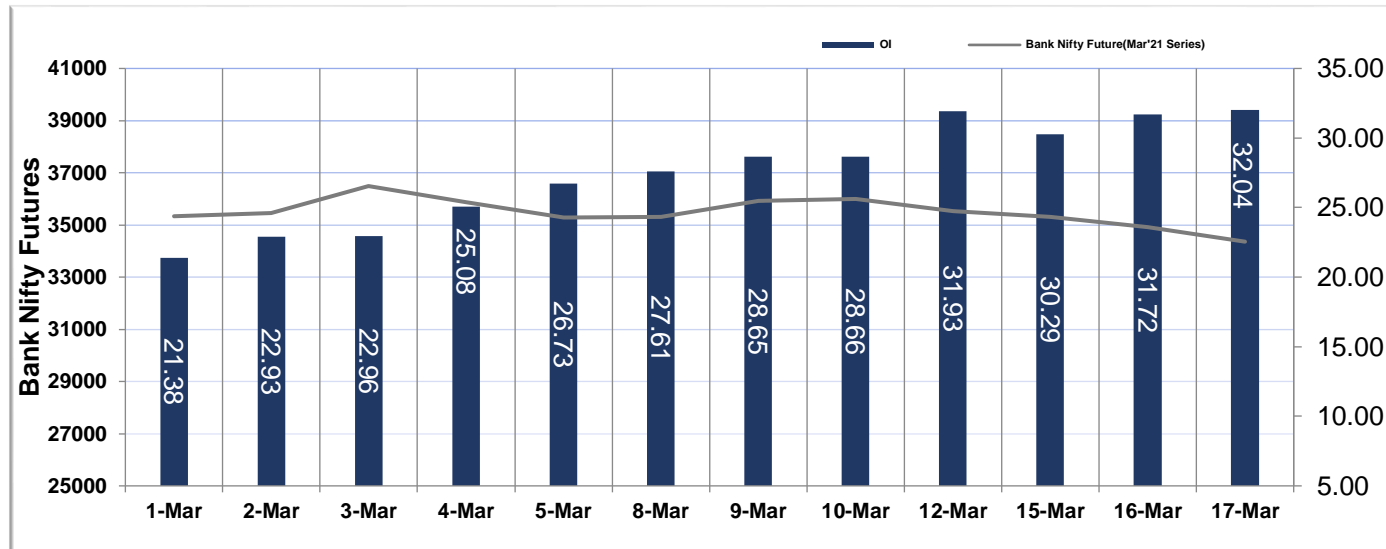


- Nifty Cash prices have settled at **14721.30** down by 1.27 percent from the previous close. On the upper side it has resistance of **14880** and **15040** levels, while lower side it has support of **14630** and **14535** levels. Intraday traders should be cautious and take position accordingly.

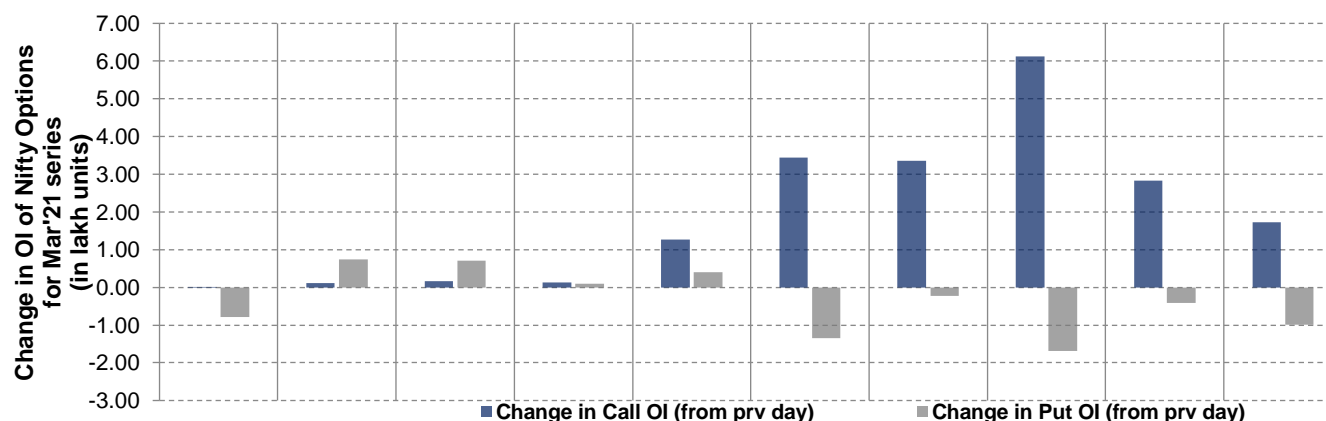
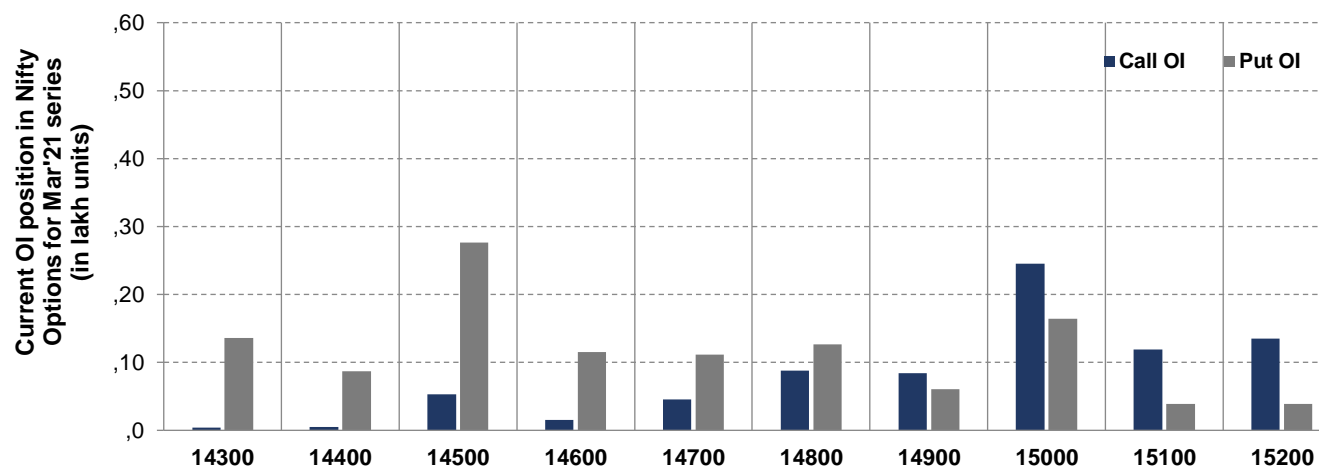
NIFTY FUTURES



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 0.61 million in open interests.
- Among Nifty puts 14,500 SP from the March month expiry was the most active put with an addition of 0.07 million in open interests.
- The maximum OI outstanding for Calls was at 15,000 SP (2.45mn) and that for Puts was at 14,500 SP (2.80mn)

Disclaimer:

The Information provided by SMS or in newsletter or in any document has been prepared by Shah Investor's Home Ltd (SIHL). The Information provided by SMS or in newsletter does not constitute an offer or solicitation for the purchase or sale of any financial instrument or as an official confirmation of any transaction. The information contained herein is from publicly available data or other sources believed to be reliable, but we do not represent that it is accurate or complete and it should not be relied on as such. SIHL or any of its affiliates/ group companies shall not be in any way responsible for any loss or damage that may arise to any person from any error in the information contained in this report or SMS. This Information provided by SMS, reports or in newsletter is provided for assistance only and is not intended to be and must not alone be taken as the basis for an investment decision. The user assumes the entire risk of any use made of this information. Each recipient of this Information provided by SMS, report or in newsletter should make such investigation as it deems necessary to arrive at an independent evaluation of an investment in the securities of companies referred to in this information provided by SMS, report or in newsletter (including the merits and risks involved), and should consult his own advisors to determine the merits and risks of such investment. The investment discussed or views expressed may not be suitable for all investors. This information is strictly confidential and is being furnished to you solely for your information.

The information should not be reproduced or redistributed or passed on directly or indirectly in any form to any other person or published, copied, in whole or in part, for any purpose. The information provided by report or SMS is not directed or intended for distribution to, or use by, any person or entity who is a citizen or resident of or located in any locality, state, country or other jurisdiction, where such distribution, publication, availability or use would be contrary to law, regulation or which would subject SIHL and affiliates/ group companies to any registration or licensing requirements within such jurisdiction. The distribution of this Information provided by SMS or in newsletter in certain jurisdictions may be restricted by law, and persons in whose possession this Information provided by SMS or in newsletter comes, should inform themselves about and observe, any such restrictions. The information given or Information provided by SMS, report or in newsletter is as of the date of the issue date of report or the date on which SMS provided and there can be no assurance that future results or events will be consistent with this information. This information is subject to change without any prior notice. SIHL reserves the right to make modifications and alterations to this statement as may be required from time to time. However, SIHL is under no obligation to update or keep the information current.

Nevertheless, SIHL is committed to providing independent and transparent recommendation to its client and would be happy to provide any information in response to specific client queries. Neither SIHL nor any of its affiliates, group companies, directors, employees, agents or representatives shall be liable for any damages whether direct, indirect, special or consequential including lost revenue or lost profits that may arise from or in connection with the use of the information. Past performance is not necessarily a guide to future performance. The disclosures of interest statements incorporated in the Information provided by SMS, report or in newsletter are provided solely to enhance the transparency and should not be treated as endorsement of the views expressed in the report. The analyst for this report certifies that all of the views expressed in this report accurately reflect his or her personal views about the subject company or companies and its or their securities, and no part of his or her compensation was, is or will be, directly or indirectly related to specific recommendations or views expressed in this report.

About Us:

Shah Investor's Home Ltd (SIHL) is an ISO 9001:2015 Certified financial Services Company established in 1994 at Ahmadabad, Gujarat. Customer satisfaction is guaranteed through our diversified product portfolio, professional management and customer first attitude. SIHL was the first broking house in Gujarat with membership in National Securities Depository Ltd (NSDL) and was the first broking name providing services in NSE F&O in Ahmedabad. Today, SIHL ranks among the top most players in Gujarat in retail stock broking area with 45 branches, 350 franchisee across India and providing service to more than 1,25,000 clients.