

Morning Mantra

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

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MARKET COMMENTARY

Indian equity benchmarks staged recovery to end higher on Friday's trading session. Markets started the day in deep red terrain, as rising coronavirus cases also dampened the sentiments in the markets. India reported 39,643 fresh Covid-19 cases on Thursday pushing the overall tally to 11,513,945, according to Worldometer. The death toll from the deadly infection jumped to 159,249. Maharashtra has recorded 25,833 new coronavirus cases, the highest one-day spike since last March when the first coronavirus infection was detected.

Indices were volatile in the first half of the trading session but in the second half of the session, markets turned positive and ended with strong gains, as a UN report said India's economy, estimated to contract by 6.9 per cent in 2020 due to the coronavirus pandemic, is forecast to record a stronger recovery in 2021 and grow by 5 per cent, it also said the country's current fiscal year budget points to a shift towards demand-side stimulus, with an uptick in public investment.

Markets added more gains in last hours of the trade, after Moody's said India's economy is likely to grow by 12 percent in 2021 following a 7.1 percent contraction last year, as near-term prospects have turned more favourable. Domestic and external demand has been on the mend since the easing of restrictions, which has led to improved manufacturing output in recent months. Moody's expect private consumption and nonresidential investment to materially pick up over the next few quarters and strengthen the domestic demand revival in 2021.

During the day, market participants were seen taking a note of the report stating that markets regulator Sebi has notified new regulations for portfolio managers, investment advisers and research analysts with regard to their qualifications. The move will help recognise 'the post graduate programme in securities market of not less than one year offered by NISM' as eligible qualification for portfolio managers, investment advisers and research analysts.

On the global front, European markets were trading lower following a sharp selloff in the tech sector on Wall Street while investors also fret about the increase in Covid-19 cases throughout the region. Asian markets ended lower on Friday, even after overall consumer prices in Japan were down 0.4 percent on year in February, the Ministry of Internal Affairs and Communications said on Friday - in line with expectations and up from -0.6 percent in January. Core CPI, which exclude volatile food costs, also was down an annual 0.4 percent.

MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	49858.24	641.72	1.30
NIFTY	14744.00	186.15	1.28
MIDCAP	20044.50	267.79	1.35
SMLCAP	20470.54	84.38	0.41
-BSEFMC	12574.56	284.78	2.32
AUTO	23000.74	90.52	0.40
POWER	2530.16	79.61	3.25
REALTY	2620.06	-14.56	-0.55
BSE IT	25995.53	207.40	0.80
BANKEX	38468.53	332.34	0.87
OIL GAS	15246.51	235.69	1.57
METAL	13879.28	252.38	1.85
INDIA VIX	19.99	-0.09	-0.45

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	1015	914	83
BSE	1423	1522	191

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	4871	4180	17
NSE CASH	94098	63568	48
NSE F&O	3101644	9256631	(66)

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	40.16	4.18	1.08
SENSEX	34.71	3.36	0.72

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	7504	6944	560
FII	24194	22775	1418

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	8952.31	7445.28	1507
Index Options	411427.93	410391.25	1037
Stock Futures	20450.35	18954.18	1496
Stock Options	22043.83	21941.50	102

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.20	0.83
BANK NIFTY	0.85	0.63

SECURITIES BAN FOR TRADE IN F&O FOR 22-03-2021

IDEA
SAIL

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.194	6.202	-0.13
USA	1.730	1.729	0.12

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	91.74	91.86	-0.13

CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
26-Mar-21 USD-INR	72.59	-	-
26-Mar-21 EUR-INR	86.43	-0.33	-0.38
26-Mar-21 GBP-INR	101.05	-0.45	-0.44
26-Mar-21 JPY- INR	66.74	0.10	0.16

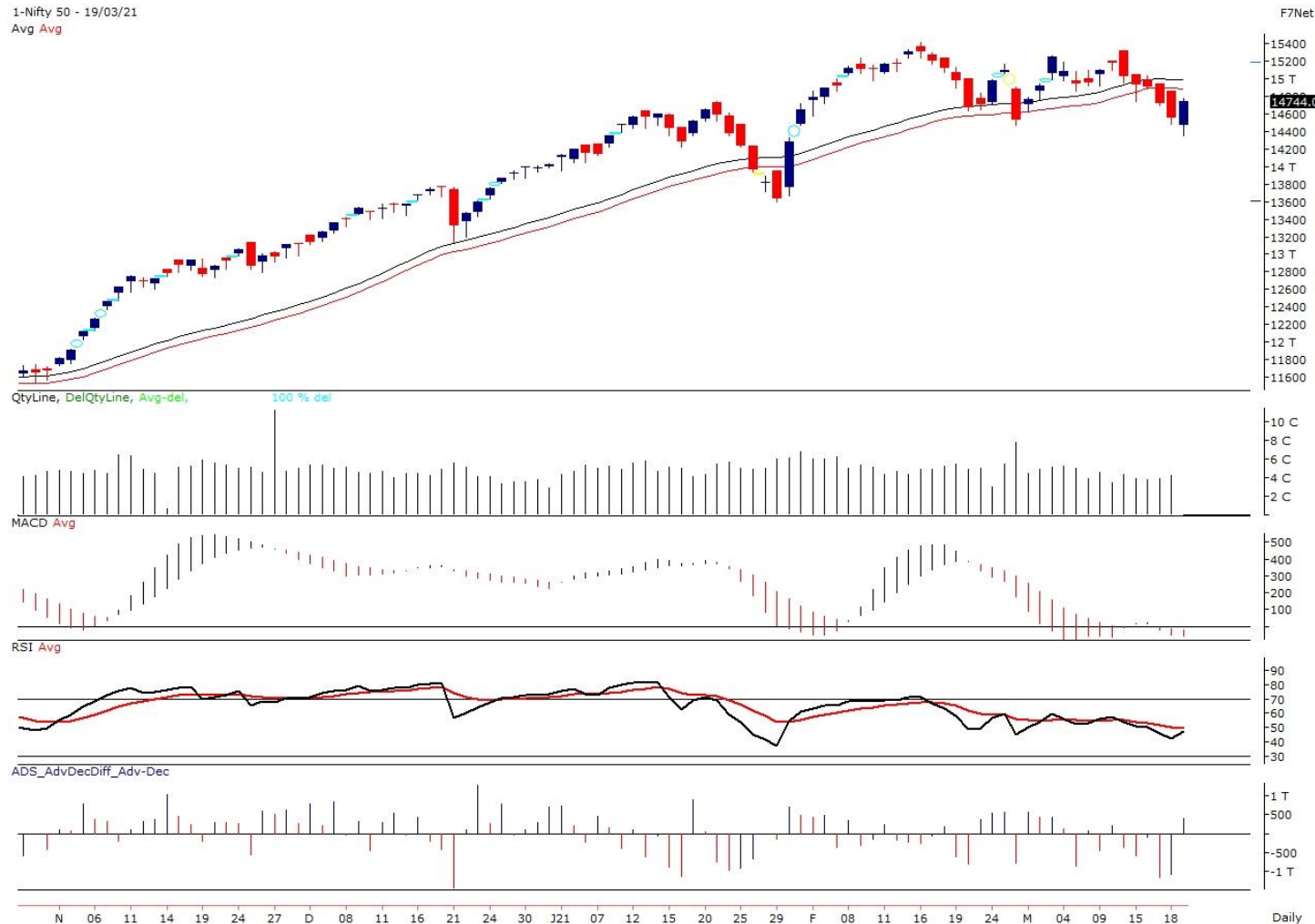
KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1743.44	8.27	0.48
Silver	26.17	0.13	0.52
Crude-Oil	61.43	1.37	2.28
Brent-Crude	64.46	1.18	1.86

INDEX TREND ANALYSIS

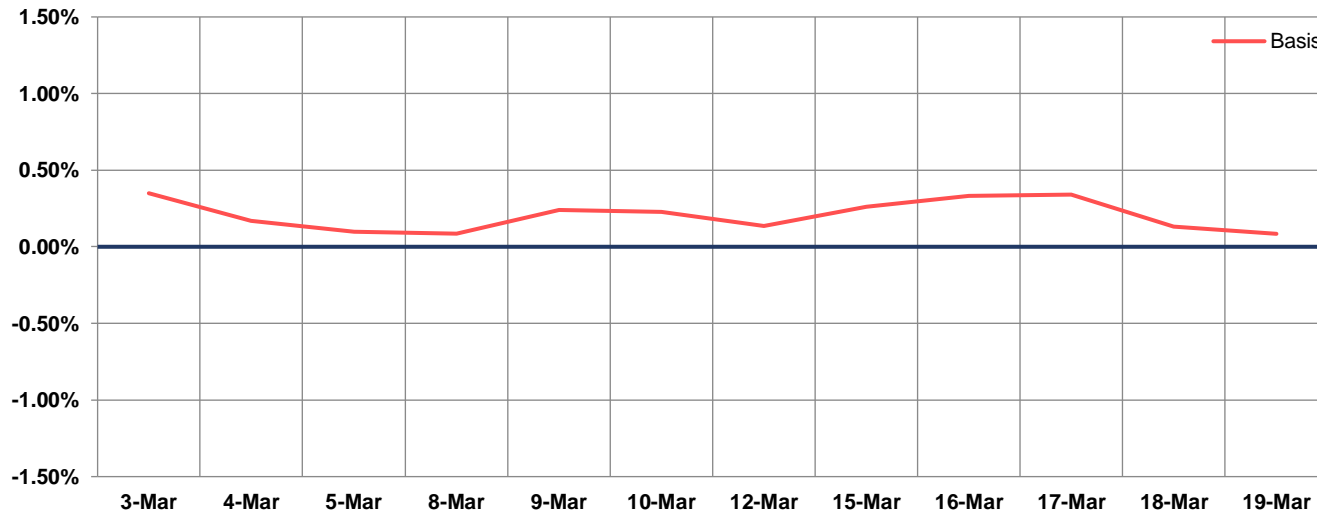
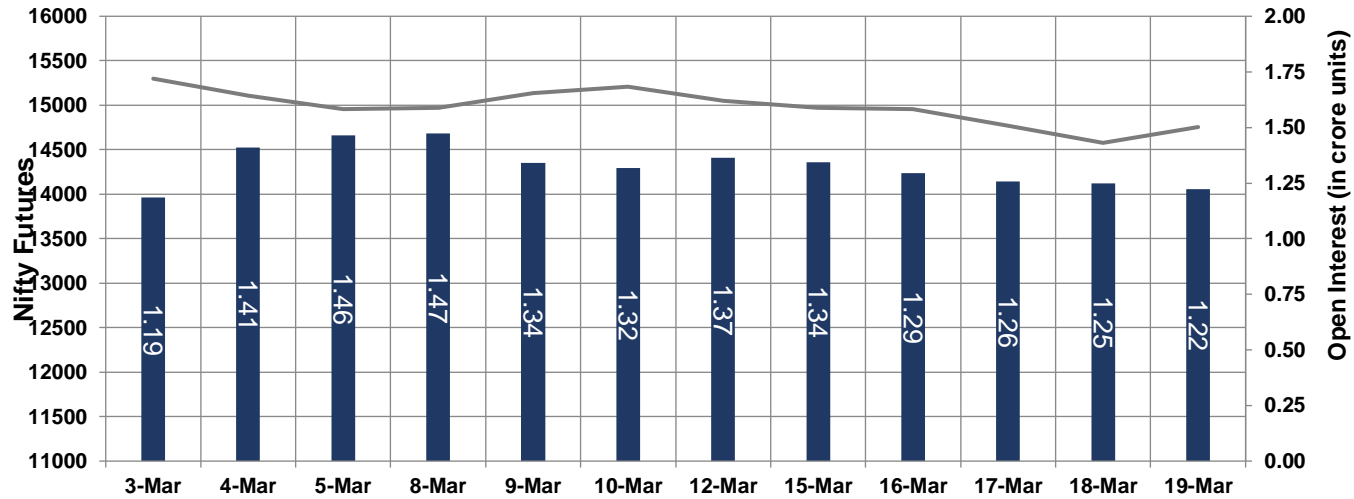
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	14558	14241	14399	14637	14796	15034	Neutral	Neutral	Buy
SENSEX	49217	48158	48687	49492	50021	50826	Neutral	Neutral	Buy
NIFTY FUTURES	14604	14277	14440	14670	14834	15064	Neutral	Neutral	Buy
BANK NIFTY	33857	32909	33383	34071	34545	35234	Sell	Neutral	Buy
CNX IT	25373	24210	24792	25594	26175	26977	Neutral	Buy	Buy
CNX MIDCAP	23130	22408	22769	23289	23650	24171	Neutral	Neutral	Buy
CNX SMALLCAP	8149	7882	8016	8205	8339	8528	Neutral	Buy	Buy
INDIA VIX	20.08	14.97	17.52	19.24	21.79	23.51	Sell	Neutral	Buy

NIFTY TECHNICAL & INDICES LEVEL

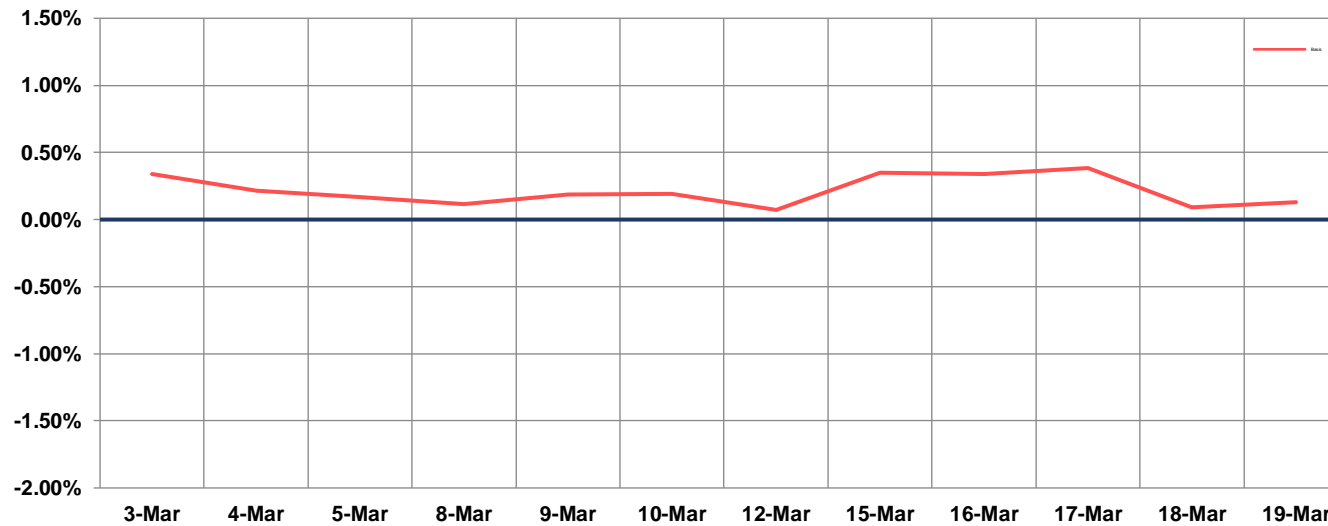
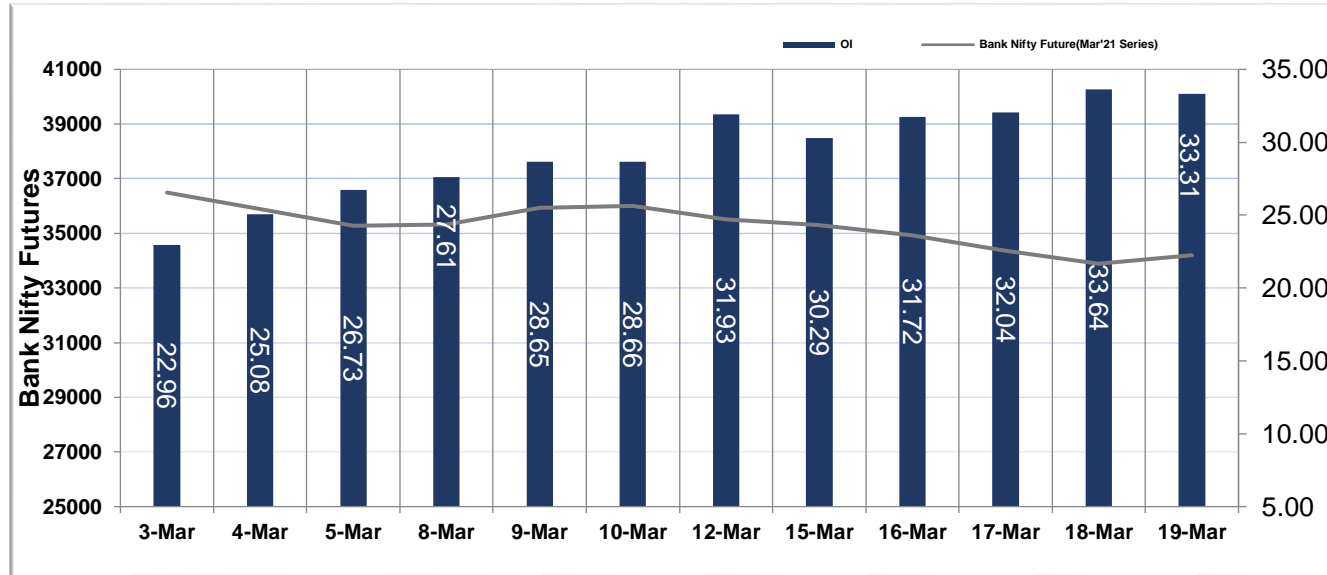


- Nifty Cash prices have settled at **14744.00** down by 1.28 percent from the previous close. On the upper side it has resistance of **14820** and **14990** levels, while lower side it has support of **14630** and **14550** levels. Intraday traders should be cautious and take position accordingly.

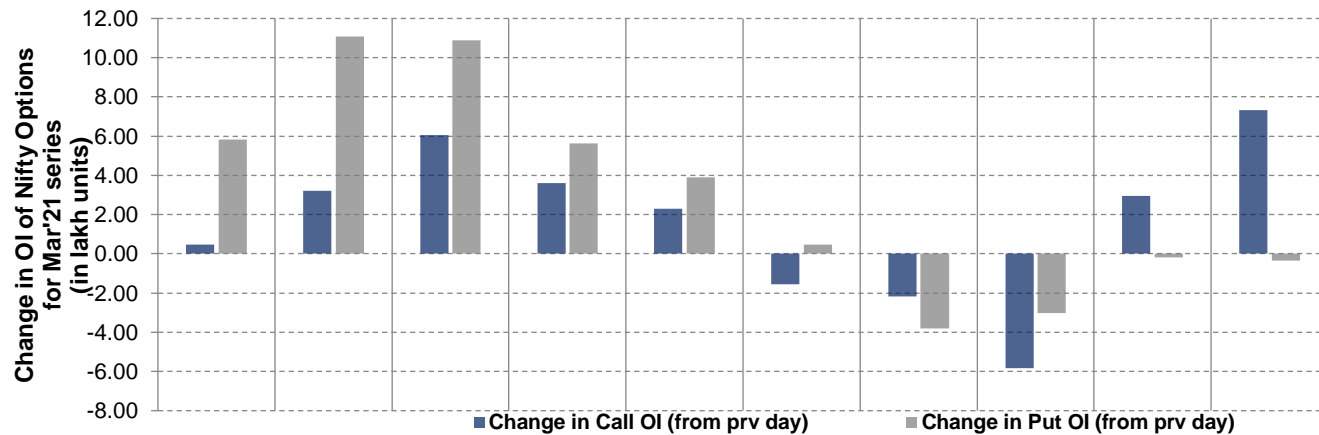
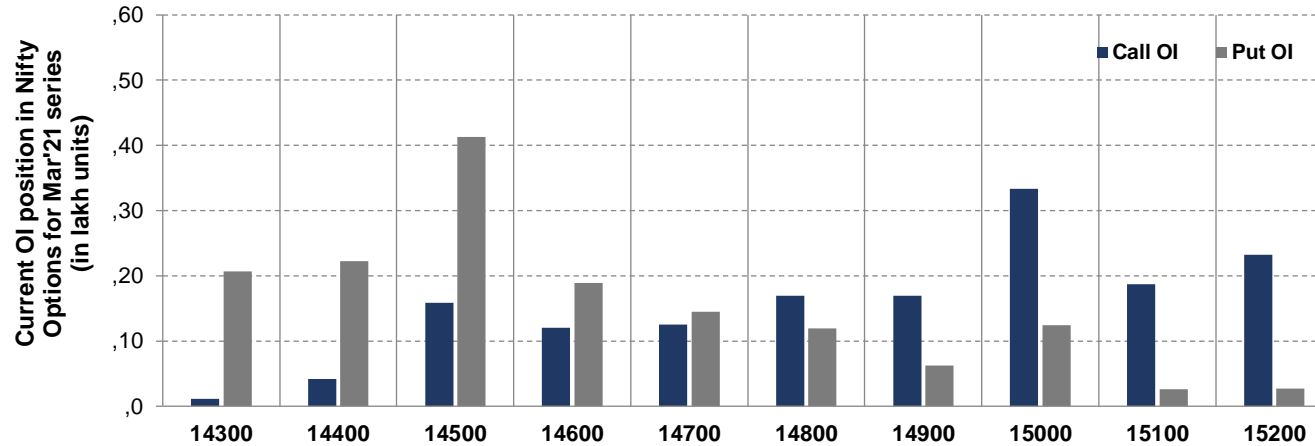
NIFTY FUTURES



BANK NIFTY FUTURES



NIFTY OPTIONS



- Among Nifty calls 15,000 SP from the March month expiry was the most active call with a reduction of 0.60 million in open interests.
- Among Nifty puts 14,500 SP from the March month expiry was the most active put with an addition of 1.09 million in open interests.
- The maximum OI outstanding for Calls was at 15,000 SP (3.33mn) and that for Puts was at 14,500 SP (4.13mn)

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