

# 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's trading session, as bears held their tight grip over the Dalal Street. Key indices started the trading day in red terrain, as rising coronavirus cases in the country dampened the sentiments in the markets. India recorded 47,264 new cases, taking to tally to 11,733,594, according to Worldometer. The death toll from the deadly infection jumped to 160,477. India has the 7th highest number of active cases globally. Maharashtra recorded 28,699 new Covid-19 cases and 132 deaths.

Weak trade continued over the Dalal Street during the whole trading session, after the IMF's managing director said that prospects for a recovery from the COVID-induced economic slowdown are uncertain and uneven, with some emerging economies and almost all low-income countries at risk of lower growth. Traders were seen taking a note of reports that Finance Minister Nirmala Sitharaman raised the limit for tax exemption on interest earned on provident fund contribution by employees to Rs 5 lakh per annum in specified cases as against Rs 2.5 lakh proposed in the Budget.

In the last hour of the trade, markets added more losses and finally ended near their intraday low points. Sentiments remained under pressure amid fears that authorities may tighten restrictions further as covid-19 cases continue to surge. According to reports, Maharashtra chief minister Uddhav Thackeray has called a cabinet meeting later today to discuss the covid-19 situation in the state. Traders overlooked Union Minister of State for Finance and Corporate Affairs Anurag Singh Thakur's statement that steps taken by the government during the pandemic have helped the economy recover, and the country is expected to clock double-digit growth in the next fiscal.

On the global front, European markets were trading lower, as renewed lockdowns across the eurozone and a row over the supply of COVID-19 vaccines dented sentiment ahead of the release of business activity data. Asian markets ended mostly lower on Wednesday, after Malaysia's consumer prices increased in February. The data from the Department of Statistics showed that the consumer price index grew 0.1 percent year-on-year in February, following a 0.2 percent fall in January. The annual growth was largely driven by the rise in prices of miscellaneous goods and services by 1.6 percent.

## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	49180.31	-871.13	-1.74
NIFTY	14549.40	-265.35	-1.79
MIDCAP	20090.53	-344.70	-1.69
SMLCAP	20440.92	-332.13	-1.60
-BSEFMC	12544.82	-171.70	-1.35
AUTO	22418.21	-599.01	-2.60
POWER	2543.08	-24.50	-0.95
REALTY	2643.59	-79.71	-2.93
BSE IT	26209.27	-276.69	-1.04
BANKEK	37490.68	-971.80	-2.53
OIL GAS	14934.56	-263.49	-1.73
METAL	13474.82	-381.64	-2.75
INDIA VIX	22.46	1.79	8.69

## ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	441	1487	76
BSE	842	2115	167

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	3605	4171	(14)
NSE CASH	58301	62038	(6)
NSE F&O	4442582	3698201	20

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	39.63	4.12	1.09
SENSEX	34.20	3.31	0.73

## FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	5581	4969	613
FII	5578	7529	(1952)

Note: FII & DII Figures are provisional

## FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	7926.47	9603.38	(1677)
Index Options	512596.00	509578.57	3017
Stock Futures	26171.64	26898.25	(727)
Stock Options	10337.12	10263.15	74

## PUT-CALL RATIO

Index	Current	Previous
NIFTY	0.97	1.24
BANK NIFTY	0.66	0.94

## SECURITIES BAN FOR TRADE IN F&O FOR 25-03-2021

IDEA
------

## 10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.154	6.144	0.16
USA	1.626	1.638	-0.73

## DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	92.55	92.33	0.24

## CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
26-Mar-21 USD-INR	72.68	0.14	0.19
26-Mar-21 EUR-INR	86.08	-0.17	-0.20
26-Mar-21 GBP-INR	99.76	-0.16	-0.16
26-Mar-21 JPY- INR	66.92	0.02	0.03

## KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1731.16	4.04	0.23
Silver	25.18	0.13	0.53
Crude-Oil	59.72	1.96	3.39
Brent-Crude	62.77	1.98	3.27

## INDEX TREND ANALYSIS

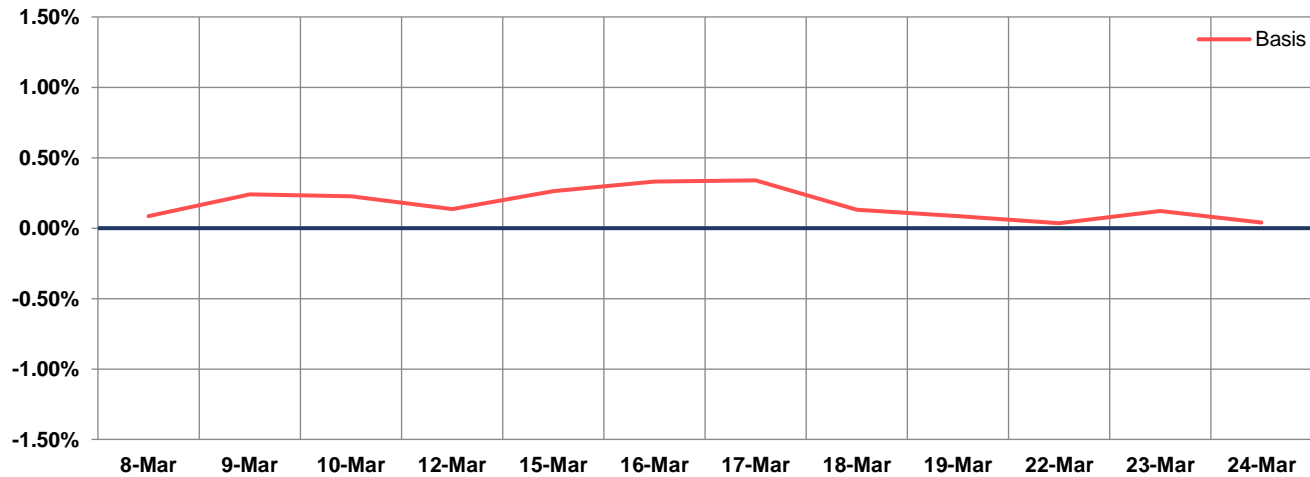
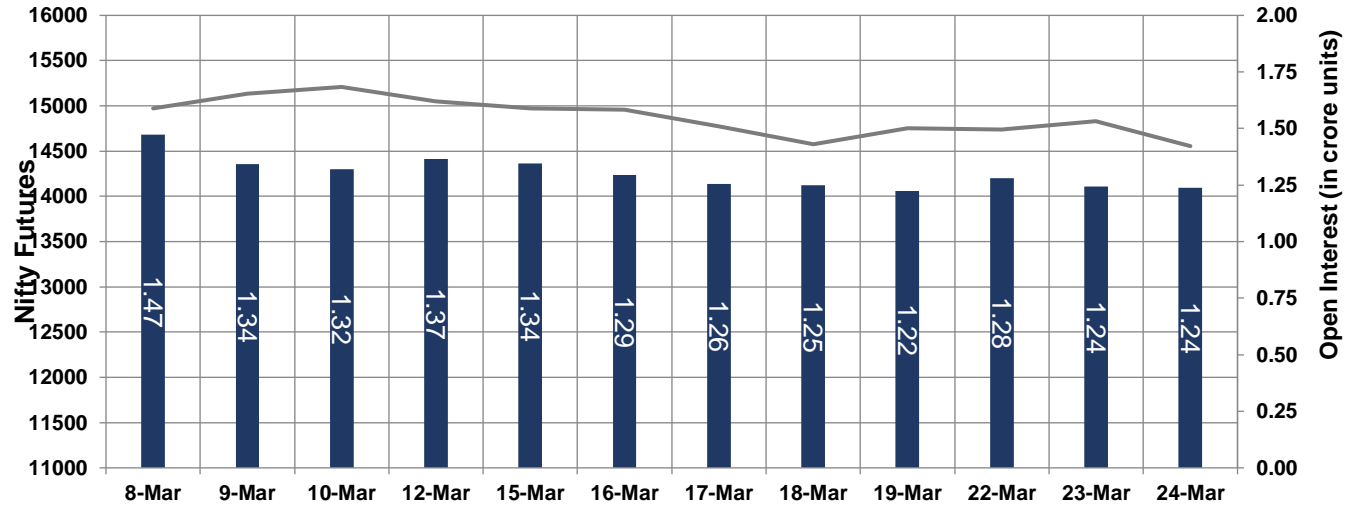
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	14549	14395	14472	14612	14690	14830	Sell	Neutral	Buy
SENSEX	49180	48651	18916	49385	49650	50119	Sell	Neutral	Buy
NIFTY FUTURES	14571	14395	14483	14623	14711	14851	Sell	Neutral	Buy
BANK NIFTY	33293	32722	33008	33489	33775	34256	Sell	Neutral	Buy
CNX IT	25803	25509	25656	25885	26032	26262	Neutral	Buy	Buy
CNX MIDCAP	23335	22909	23122	23503	23716	24098	Neutral	Neutral	Buy
CNX SMALLCAP	8066	7929	7997	8122	8191	8316	Neutral	Buy	Buy
INDIA VIX	22.45	18.68	20.57	21.63	23.52	24.58	Neutral	Neutral	Buy

## NIFTY TECHNICAL & INDICES LEVEL

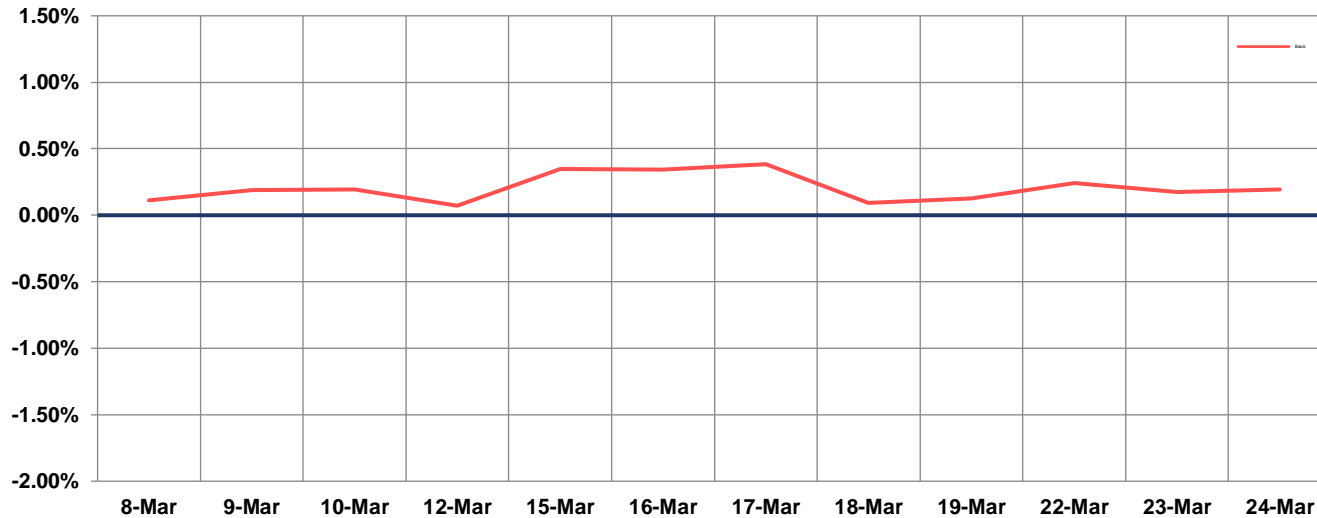
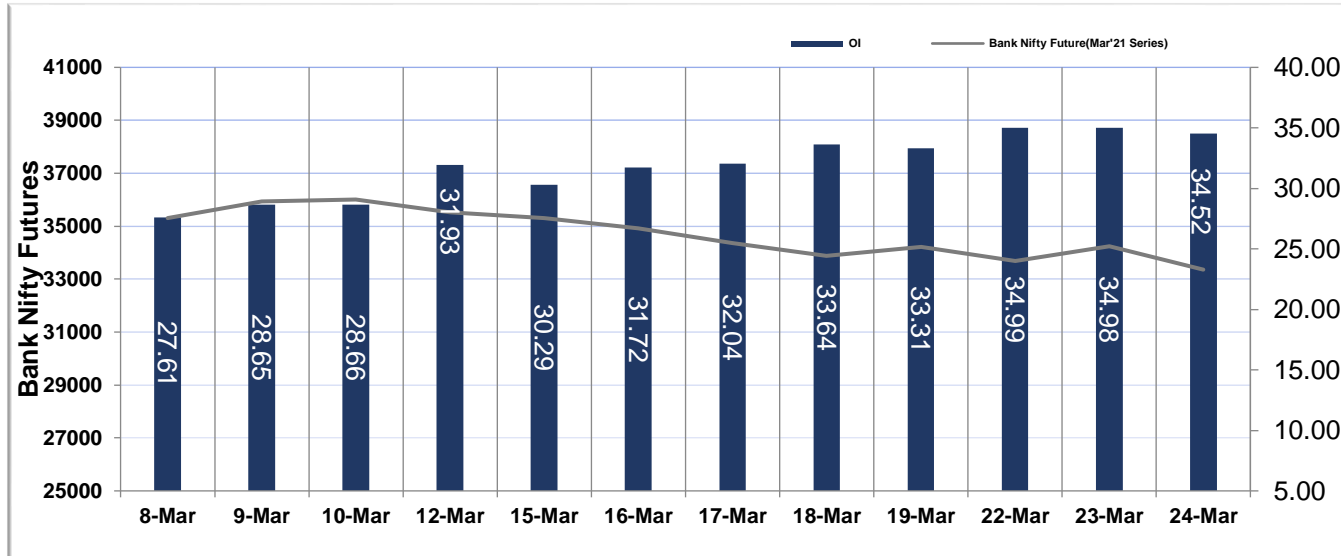


- Nifty Cash prices have settled at **14549.40** down by 1.79 percent from the previous close. On the upper side it has resistance of **14650** and **14800** levels, while lower side it has support of **14200** and **14290** levels. Intraday traders should be cautious and take position accordingly.

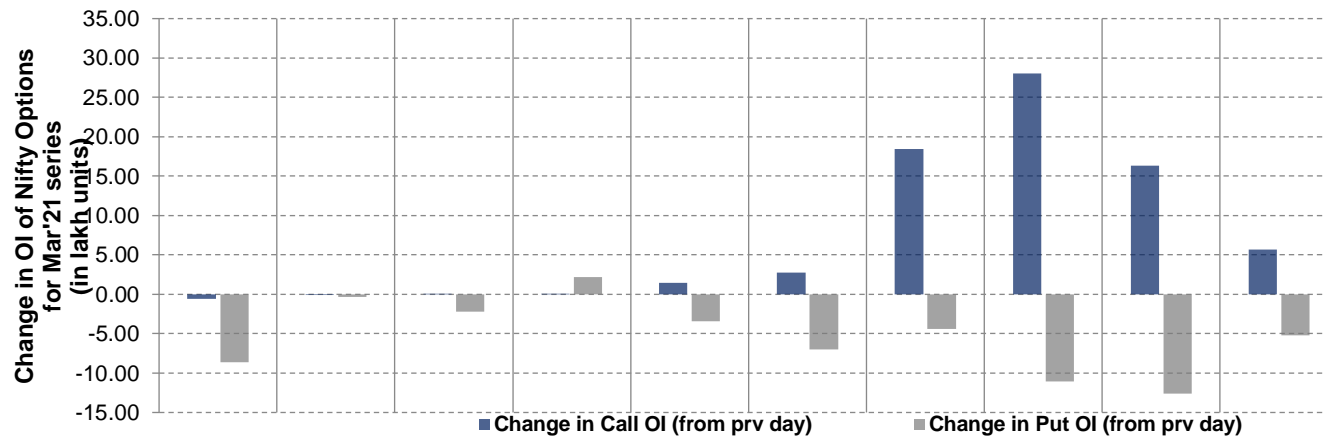
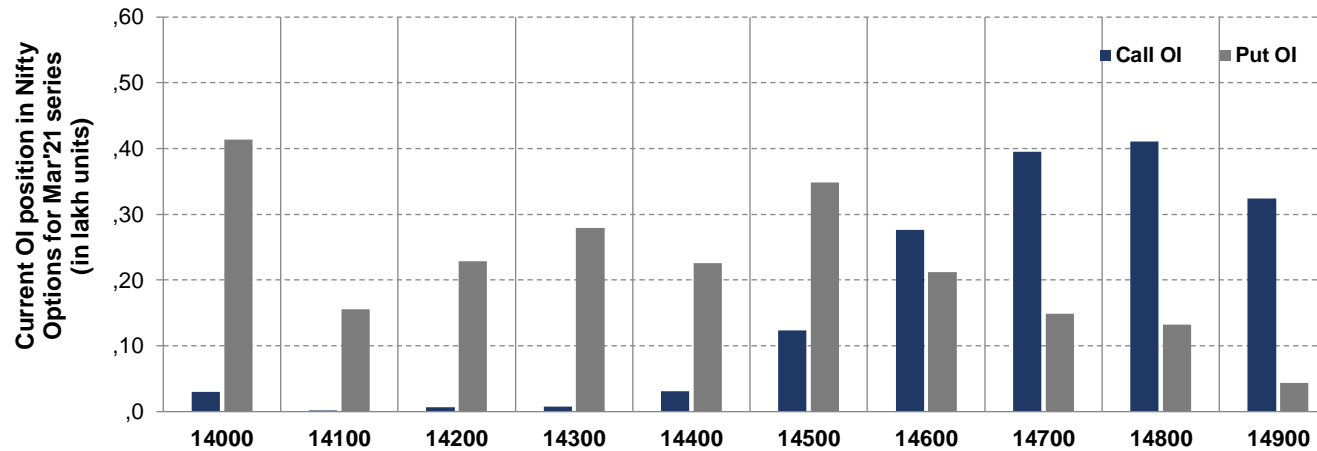
## NIFTY FUTURES



## BANK NIFTY FUTURES



## NIFTY OPTIONS



- Among Nifty calls 14,800 SP from the March month expiry was the most active call with an addition of 1.64 million in open interests.
- Among Nifty puts 14,000 SP from the March month expiry was the most active put with a reduction of 0.90 million in open interests.
- The maximum OI outstanding for Calls was at 14,800 SP (4.10mn) and that for Puts was at 14,000 SP (4.14mn)



## 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.