

Morning Mantra

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

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MARKET COMMENTARY

Indian equity benchmarks ended with strong gains on Friday. After an optimistic start, key indices remained higher for the whole day, taking support with CARE Ratings' report that Indian economy will grow in the range of 11-11.2 per cent in the coming financial year. It said the high Gross Domestic Product (GDP) growth in FY22 will be on the back of low base effect in FY21 and broad-based recovery across the economy. Adding more optimism, Reserve Bank of India (RBI) Governor Shaktikanta Das expressed confidence that the second wave of Covid infections will not derail India's economic journey.

Firm trade continued over the Dalal Street during the trading session, as bulls held their tight grip in the markets, on the back of positive cues from the global markets. Domestic sentiments remained optimistic, amid reports that as part of furthering the ease of doing business in the country, the government is set to introduce a single-window clearance mechanism for investors by mid-April in order to attract greater foreign investment. The single-window portal will integrate the existing clearance systems of various central and state departments.

During afternoon deals, markets added more gains, with the International Monetary Fund (IMF) stating that India's economy is on the path of gradual recovery, real GDP growth, return to positive territory in fourth quarter of 2020. And that's for the first time actually since the start of the pandemic and it's supported by a pickup in gross, fixed capital formation. Some comfort also came with Chief Economic Advisor K V Subramanian's statement that the investment climate is going well in India and the private sector should skill their workforce in the interest of its business.

On the global front, European markets were trading higher despite an increase in COVID-19 cases across the continent. Asian markets ended in green on Friday, after South Korea's consumer confidence improved in March. The survey results from Bank of Korea showed that the consumer confidence index rose to 100.5 in March from 97.4 in February. The indicator measuring current living standards rose two points to 89 in March and that concerning the outlook for living standards increased one points to 95.

MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	49008.50	568.38	1.17
NIFTY	14507.30	182.40	1.27
MIDCAP	19970.37	326.48	1.66
SMLCAP	20278.96	216.90	1.08
-BSEFMC	12462.17	215.19	1.76
AUTO	22050.93	260.25	1.19
POWER	2485.90	14.70	0.59
REALTY	2620.21	43.90	1.70
BSE IT	25830.98	88.92	0.35
BANDEX	37527.83	326.34	0.88
OIL GAS	14671.05	115.33	0.79
METAL	13937.34	469.72	3.49
INDIA VIX	20.65	-2.05	-9.02

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	1153	766	96
BSE	1658	1296	180

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	4224	4553	(7)
NSE CASH	58370	69772	(16)
NSE F&O	2144905	9513616	(77)

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	39.51	4.11	1.09
SENSEX	34.26	3.32	0.73

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	5877	4174	1703
FII	6317	6367	(50)

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	6398.84	4519.05	1880
Index Options	272377.69	272936.75	(559)
Stock Futures	12195.50	11477.33	718
Stock Options	9798.68	10156.10	(357)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.14	0.91
BANK NIFTY	0.87	0.80

SECURITIES BAN FOR TRADE IN F&O FOR 30-03-2021

NIL

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.129	6.131	-0.03
USA	1.674	1.614	3.73

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	92.72	92.80	-0.09

CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
26-Mar-21 USD-INR	72.97	-0.09	-0.12
26-Mar-21 EUR-INR	85.99	-0.45	-0.53
26-Mar-21 GBP-INR	100.47	0.24	0.24
26-Mar-21 JPY- INR	66.65	-0.43	-0.64

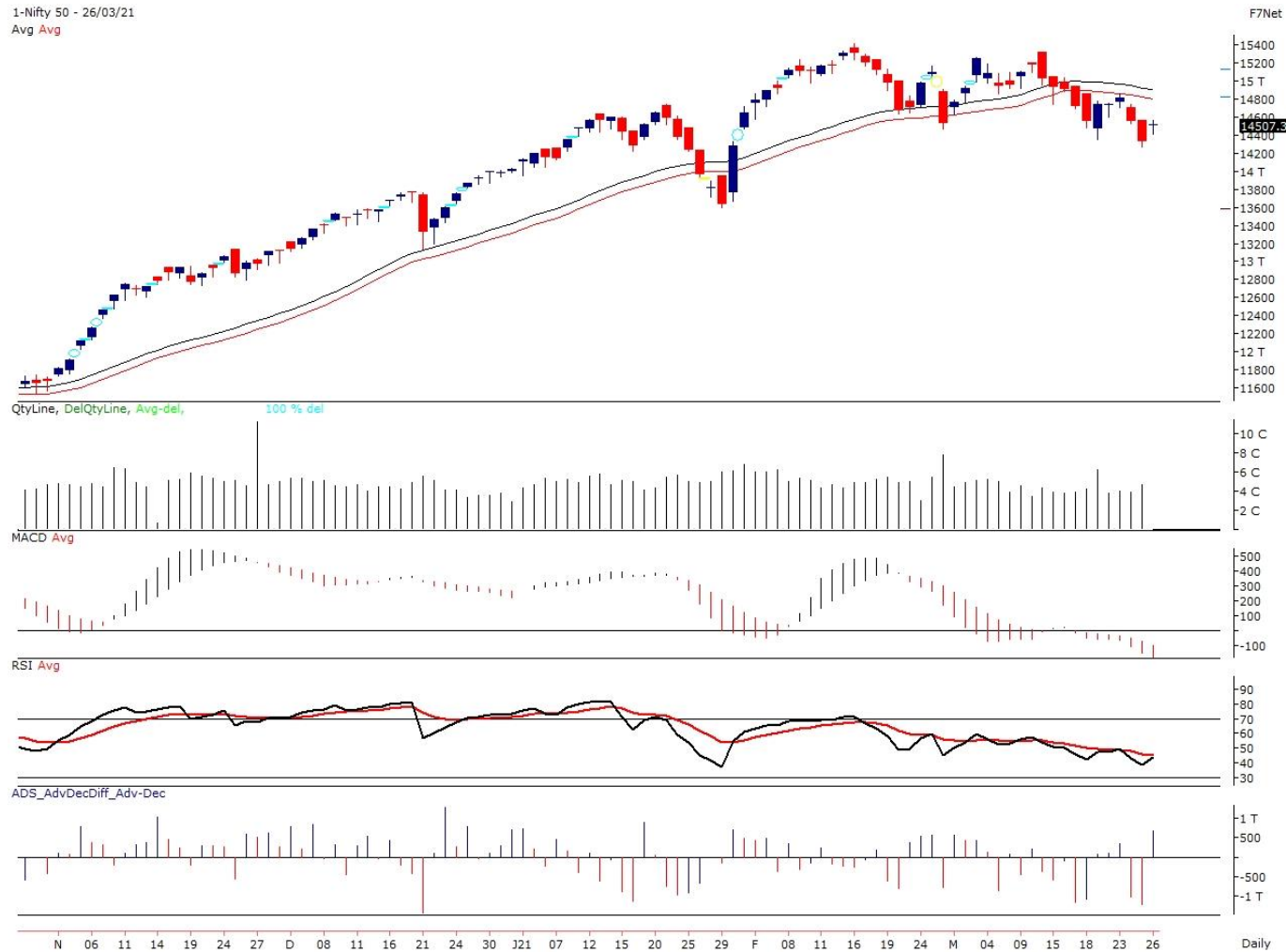
KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1731.53	4.23	0.24
Silver	25.02	-0.07	-0.30
Crude-Oil	60.80	2.24	3.83
Brent-Crude	64.33	2.38	3.84

INDEX TREND ANALYSIS

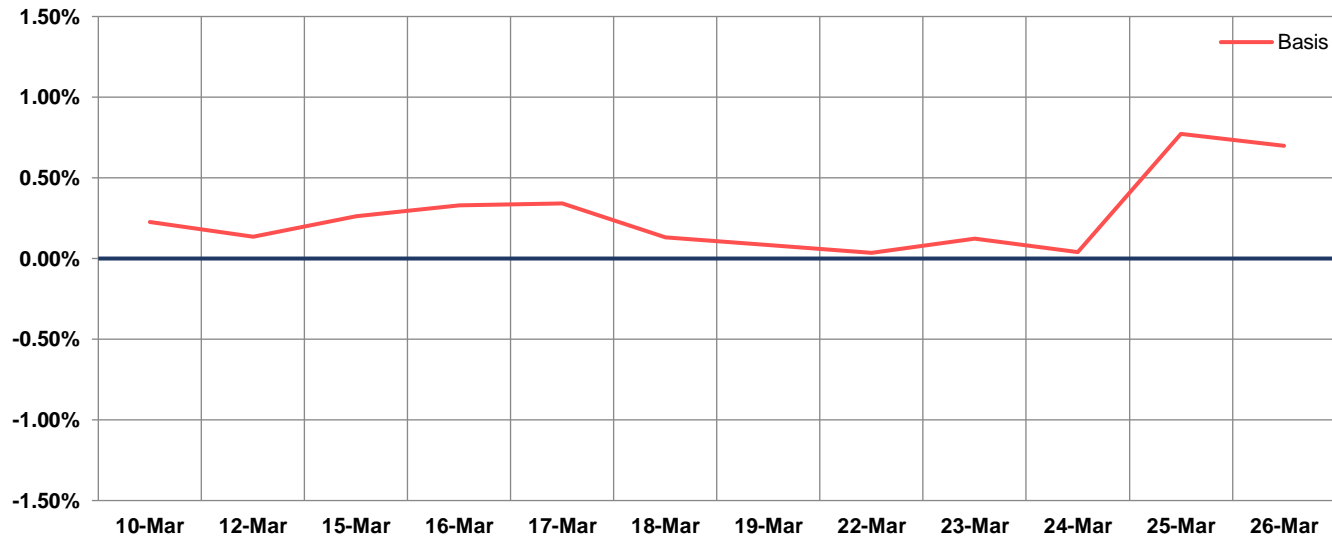
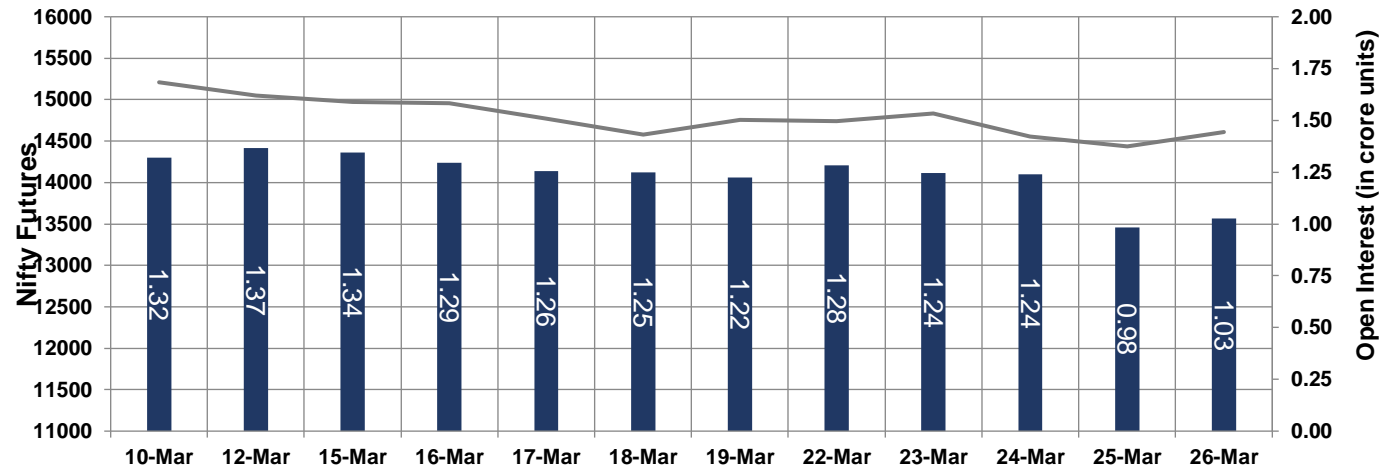
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	14507	14340	14423	14498	14582	14657	Sell	Neutral	Buy
SENSEX	49009	48446	48727	48981	49262	49516	Sell	Neutral	Buy
NIFTY FUTURES	14622	14425	14524	14599	14698	14773	Sell	Neutral	Buy
BANK NIFTY	33318	32920	33119	33365	33564	33810	Sell	Neutral	Buy
CNX IT	25385	25039	25212	25450	25623	25860	Neutral	Neutral	Buy
CNX MIDCAP	23214	22960	23087	23194	23321	23427	Neutral	Neutral	Buy
CNX SMALLCAP	7983	7900	7941	7985	8026	8070	Neutral	Neutral	Buy
INDIA VIX	20.65	15.90	18.28	20.60	22.97	25.29	Sell	Sell	Buy

NIFTY TECHNICAL & INDICES LEVEL

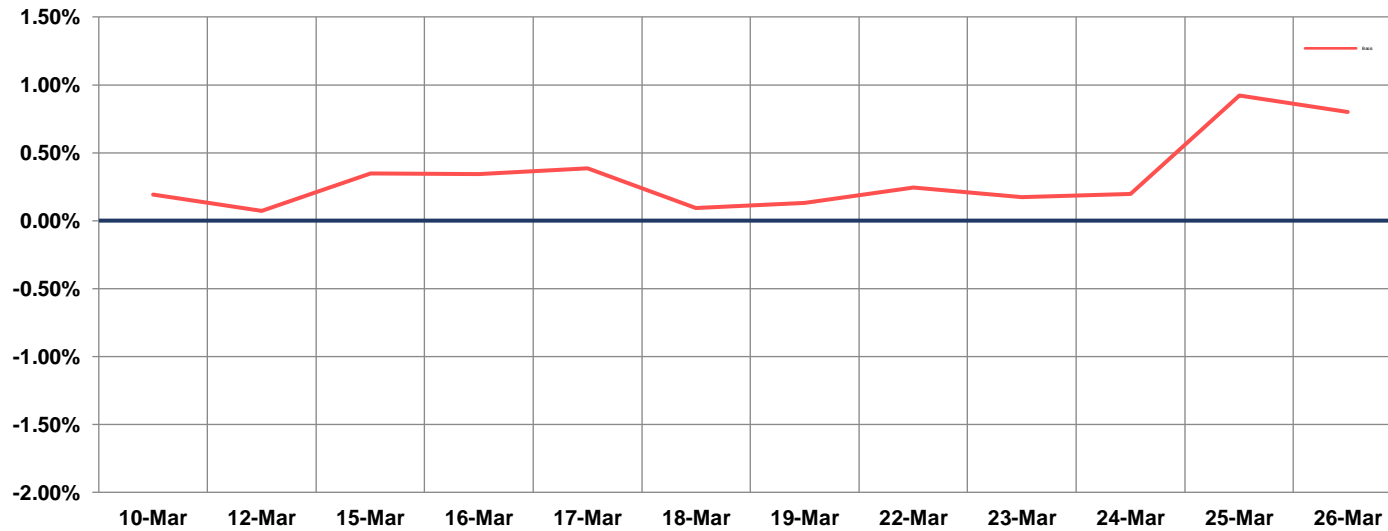
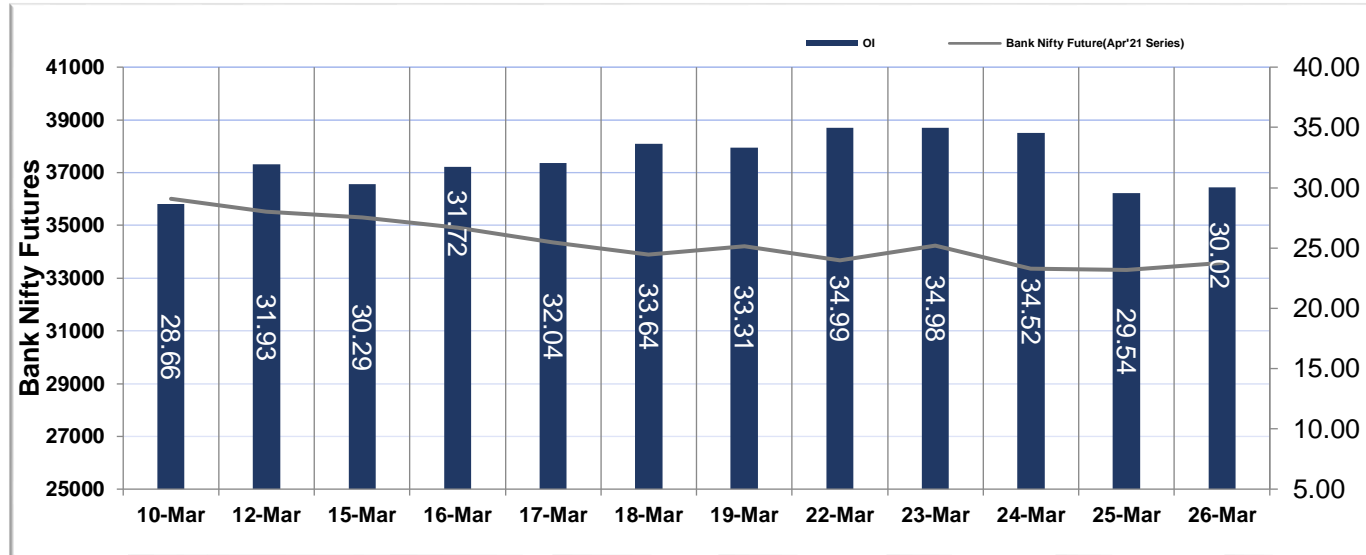


- Nifty Cash prices have settled at **14507.30** up by 1.27 percent from the previous close. On the upper side it has resistance of **14690** and **14820** levels, while lower side it has support of **14430** and **14290** levels. Intraday traders should be cautious and take position accordingly.

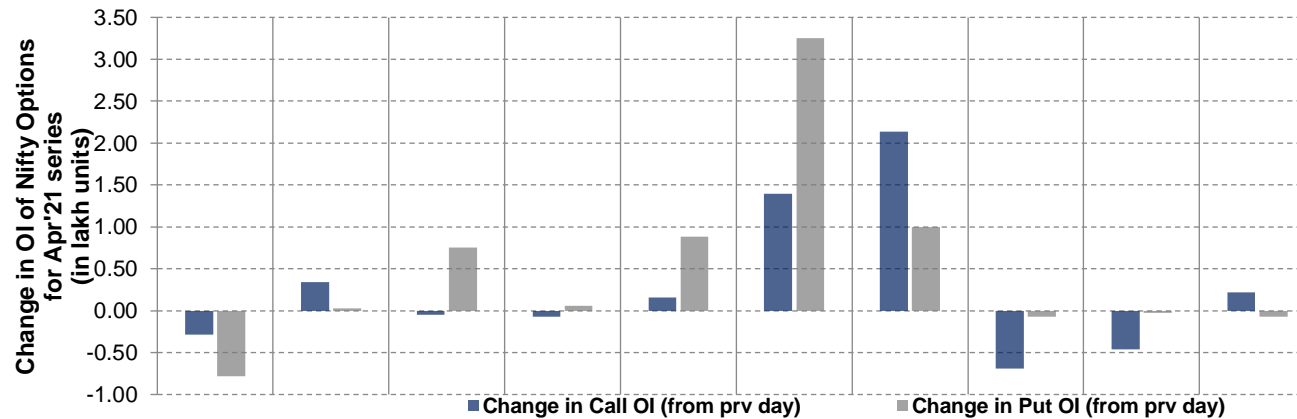
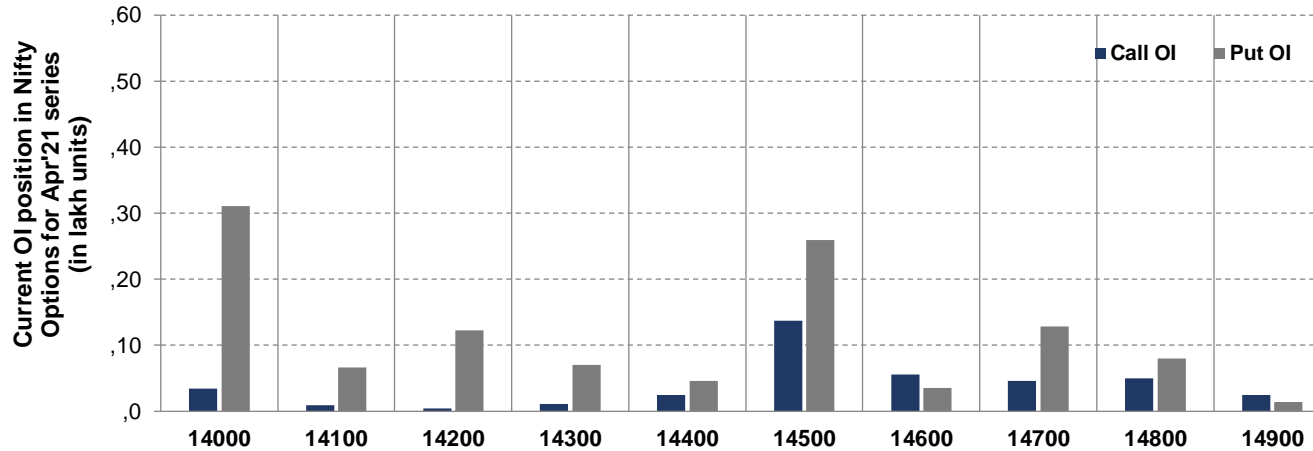
NIFTY FUTURES



BANK NIFTY FUTURES



NIFTY OPTIONS



- Among Nifty calls 14,500 SP from the April month expiry was the most active call with an addition of 0.14 million in open interests.
- Among Nifty puts 14,000 SP from the April month expiry was the most active put with a reduction of 0.08 million in open interests.
- The maximum OI outstanding for Calls was at 14,800 SP (1.37mn) and that for Puts was at 14,000 SP (3.20mn)

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