

Morning Mantra

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

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MARKET COMMENTARY

Indian equity benchmarks ended volatile session in green terrain on Tuesday. After a cautious start, markets remained higher with notable gains during morning deals, as India has attracted record total FDI inflow for the first ten months of a financial year in 2020-21. Accordingly, the inflow rose to \$72.12 billion during April to January, 2021, 15 per cent higher as compared to the first ten months of 2019-20, when it stood at \$62.72 billion. The FDI equity inflow grew by 28 per cent in the first ten months of FY 2020-21 (\$54.18 billion) compared to the year ago period (\$42.34 billion).

Domestic sentiments remained positive in morning deals, after Finance Ministry report has exuded confidence in the Indian economy and termed the economic recovery as resilient citing improvement in high frequency indicators. The Monthly Economic Review for March 2021 released by the Department of Economic Affairs (DEA) said that the agricultural sector remains the bright spot of Indian economy with foodgrains production touching 303.3 million tonnes in 2020-21 beating record production levels for the fifth consecutive year in a row.

In afternoon deals, key indices cut their gains and turned volatile, impacted with Care Ratings' statement that Maharashtra's radical lockdown move will have an economic impact of Rs 40,000 crore, with the trade, hotels and transport sector to bear the biggest dent. The rating agency said the loss of economic activity will have a 0.32 per cent impact on the gross value added (GVA) growth at the national level. It revised down its national GDP growth estimate to 10.7 - 10.9 per cent from the 11 - 11.2 per cent given a week ago.

On the global front, European markets were trading higher as trading resumes after the Easter holiday, with global sentiment boosted by positive economic data in the U.S. and China. Asian markets ended mostly lower on Tuesday, even after China's service sector growth accelerated in March driven by steeper increases in activity and overseas sales. The survey results from IHS Markit showed that the Caixin Purchasing Managers' Index rose to 54.3 in March from 51.5 in February. The pace of expansion was the fastest in last three months. The score has remained above the neutral 50.0 level for eleventh consecutive month.

MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	49201.39	42.07	0.09
NIFTY	14683.50	45.70	0.31
MIDCAP	20485.83	201.97	1.00
SMLCAP	21020.10	175.11	0.84
-BSEFMC	12809.12	125.46	0.99
AUTO	22017.75	20.09	0.09
POWER	2545.91	3.37	0.13
REALTY	2606.30	25.16	0.97
BSE IT	27363.19	69.11	0.25
BANKEK	36725.67	-187.20	-0.51
OIL GAS	14796.70	-7.16	-0.05
METAL	15409.85	137.26	0.90
INDIA VIX	20.84	-0.38	-1.77

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	1157	769	79
BSE	1646	1241	184

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	3821	4444	(14)
NSE CASH	64822	65365	(1)
NSE F&O	3485658	2968147	17

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	33.18	4.2	0.96
SENSEX	34.26	3.32	0.73

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	4519	4102	417
FII	4825	5918	(1093)

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	4807.69	4509.42	298
Index Options	446017.06	443528.97	2488
Stock Futures	11343.19	11194.04	149
Stock Options	9025.19	8995.41	30

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.13	1.07
BANK NIFTY	0.59	0.56

SECURITIES BAN FOR TRADE IN F&O FOR 07-04-2021

SAIL

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.122	6.123	-0.02
USA	1.688	1.720	-1.87

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	92.40	92.59	-0.21

CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
28-Apr -21 USD-INR	73.67	0.12	0.16
28-Apr -21 EUR-INR	86.98	0.46	0.54
28-Apr -21 GBP-INR	101.85	-0.09	-0.09
28-Apr -21 JPY- INR	66.75	0.15	0.23

KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1744.23	14.88	0.86
Silver	25.26	0.44	1.81
Crude-Oil	59.84	1.19	2.05
Brent-Crude	63.28	1.13	1.82

INDEX TREND ANALYSIS

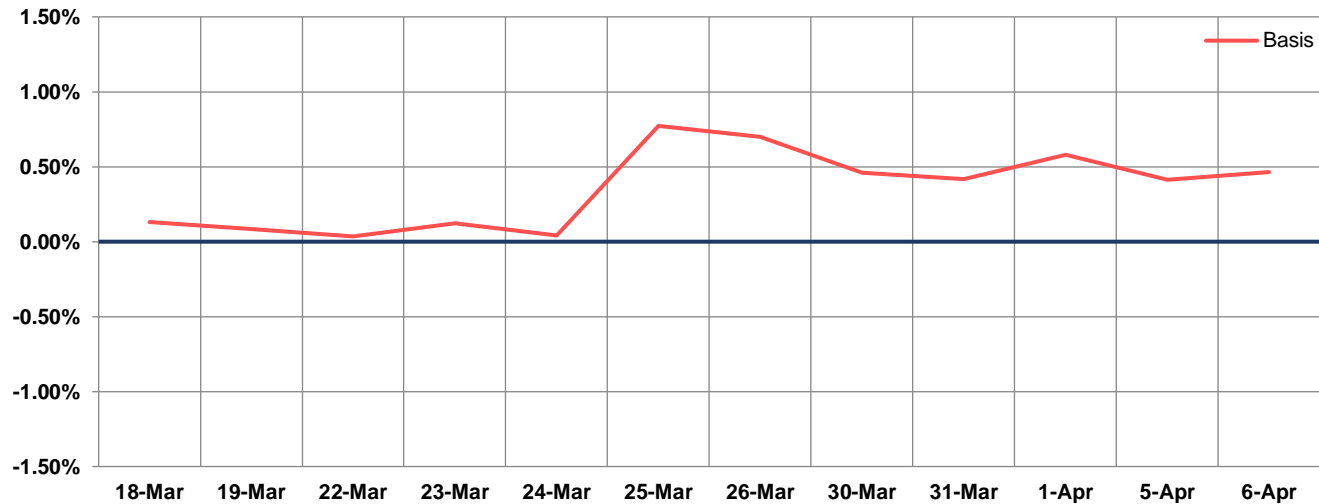
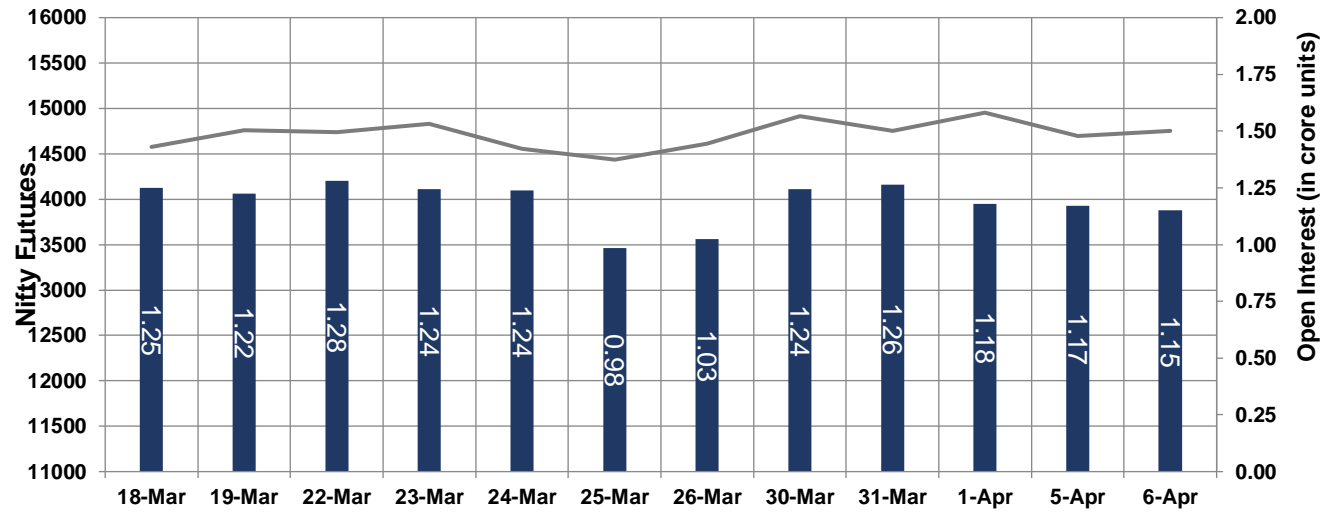
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	14684	14474	14579	14679	14784	14884	Sell	Neutral	Buy
SENSEX	49201	48594	48898	49240	49544	49886	Sell	Neutral	Buy
NIFTY FUTURES	14764	14510	14637	14743	14870	14976	Sell	Neutral	Buy
BANK NIFTY	32501	31947	32224	32616	32893	33285	Sell	Neutral	Buy
CNX IT	26532	26239	26385	26550	26697	26862	Buy	Neutral	Buy
CNX MIDCAP	24016	23569	23793	23954	24178	24339	Buy	Neutral	Buy
CNX SMALLCAP	8273	8097	8185	8233	8321	8369	Buy	Neutral	Buy
INDIA VIX	20.84	18.52	19.68	20.96	22.12	23.40	Sell	Sell	Buy

NIFTY TECHNICAL & INDICES LEVEL

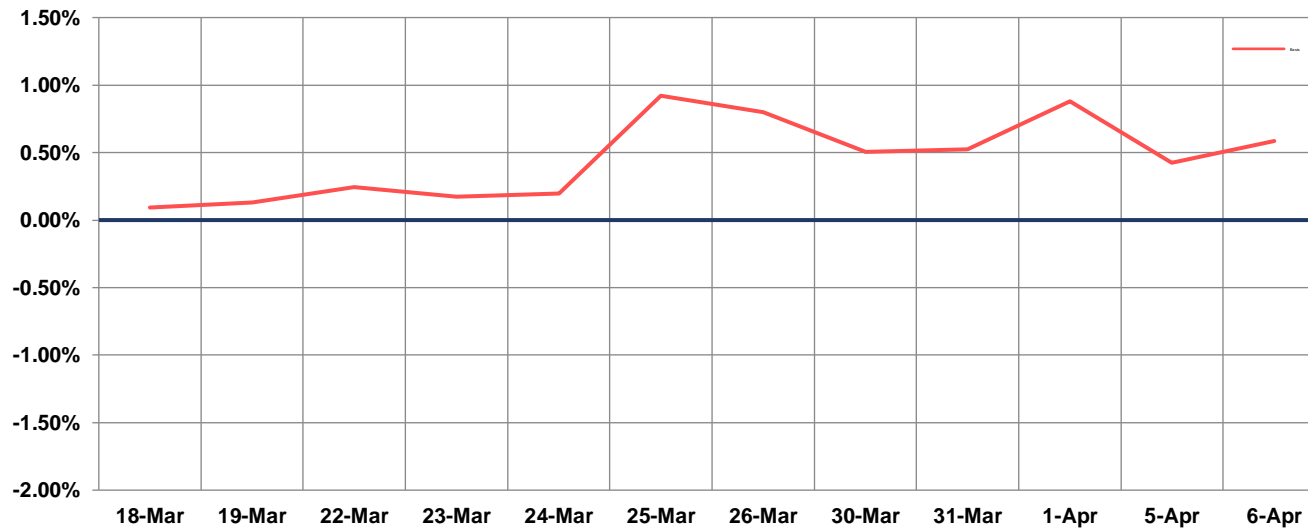
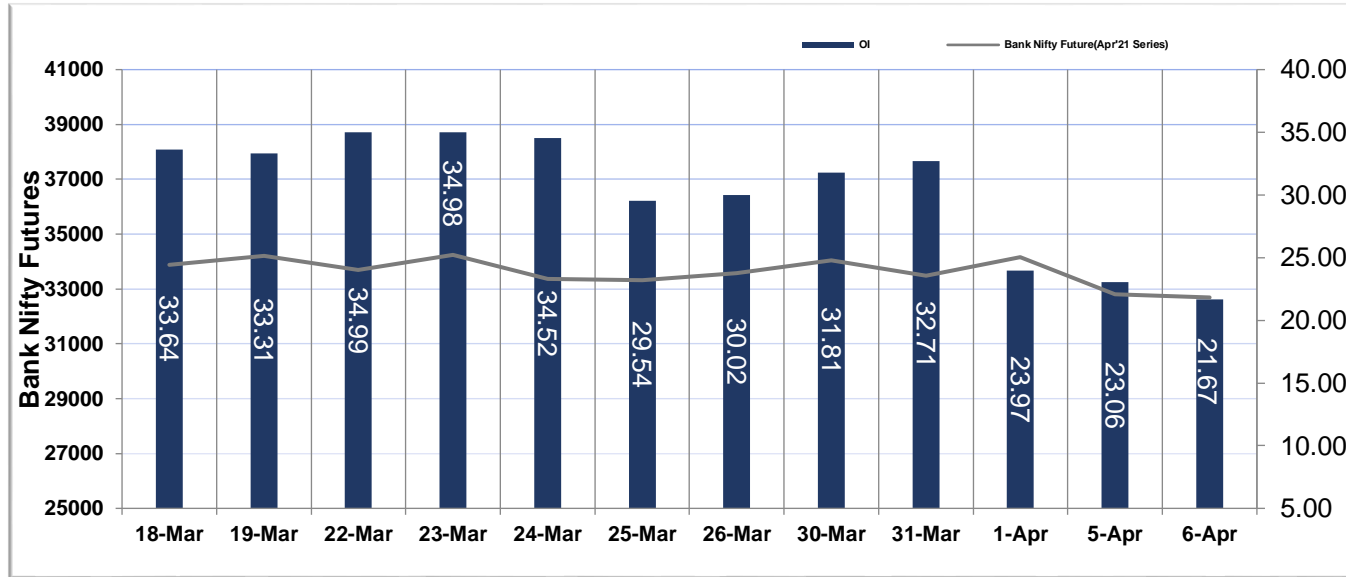


- Nifty Cash prices have settled at **14683.50 up** by 0.31 percent from the previous close. On the upper side it has resistance of **14790** and **14880** levels, while lower side it has support of **14550** and **14430** levels. Intraday traders should be cautious and take position accordingly.

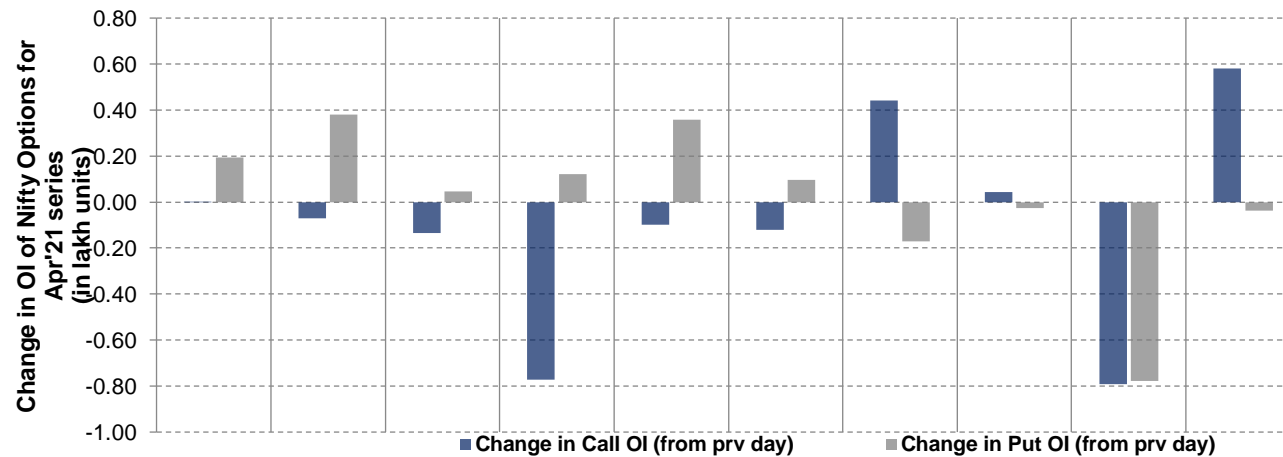
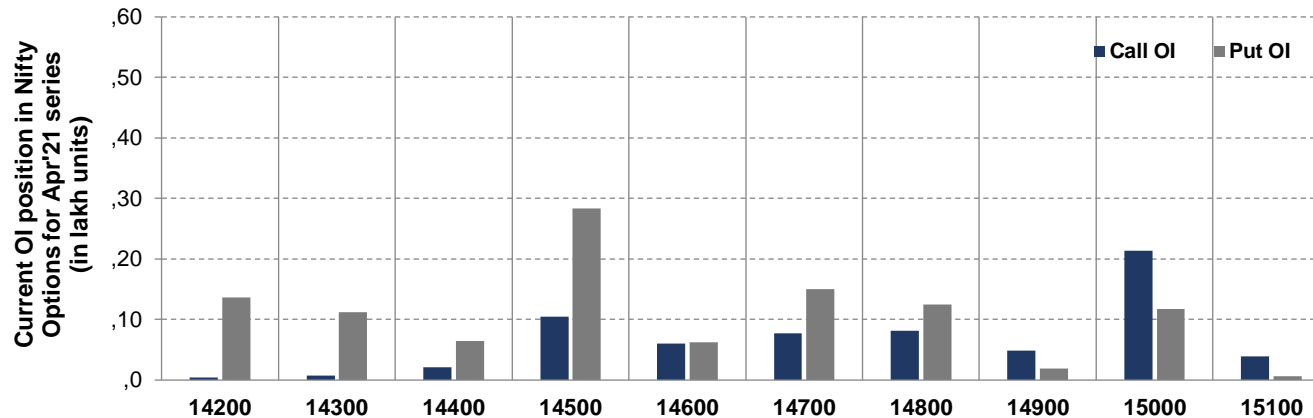
NIFTY FUTURES



BANK NIFTY FUTURES



NIFTY OPTIONS



- Among Nifty calls 15,000 SP from the April month expiry was the most active call with a reduction of 0.08 million in open interests.
- Among Nifty puts 14,500 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 15,000 SP (2.13mn) and that for Puts was at 14,500 SP (2.83mn)

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