

Morning Mantra

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

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MARKET COMMENTARY

Indian equity benchmarks ended lower on Friday. Markets made a cautious start, as breaking all records, India has recorded a massive surge of 131,893 Covid-19 cases in the last 24 hours. With this, India's tally now stands at 13,057,954, Worldometer showed. Active cases are nearing the 1-million mark. India is now the 4th-worst hit country in terms of active cases. In morning deals, markets traded in green, taking support with Crisil Ratings' report that after eight quarters of either decline or single-digit growth, corporate revenue grew in high double-digits of 15-17 per cent in the March quarter of FY21 to Rs 6.9 lakh crore, partly because of the low base and better realisation due to higher commodity prices, pushing up their operating profits by a much higher 28-30 per cent.

But, in afternoon deals, key indices turned volatile and added more losses in the second half of the trading session to end the day in red terrain. Sentiments over the street remained negative, as some concerns came with ICRA Ratings' report that an unabated increase in the COVID cases is likely to bring about fears of harsher lockdowns, which could impact the asset quality of retail loans especially for unsecured loans such as in the microfinance sector. It said this, in turn, would impact the fund-raising ability of the NBFCs and HFCs through securitisation of their assets.

On the global front, European markets were trading mostly in red as investors absorbed the latest comments from Federal Reserve Chairman Jerome Powell, and fresh data showing inflationary pressures on the rise in China. Asian markets ended mostly lower on Friday, after consumer prices in China were up 0.4 percent on year in March. The National Bureau of Statistics said that exceeded expectations for an increase of 0.3 percent following the 0.2 percent contraction in the previous month. On a monthly basis, inflation sank 0.5 percent - shy of forecasts for a decline of 0.4 percent after jumping 0.6 percent in February. The bureau also said that producer prices jumped 4.4 percent on year in March - beating expectations for an increase of 3.5 percent and up sharply from the 1.7 percent gain a month earlier.

MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	49591.32	-154.89	-0.31
NIFTY	14834.85	-38.95	-0.26
MIDCAP	20762.67	-15.64	-0.08
SMLCAP	21596.85	147.28	0.69
-BSEFMC	13061.86	115.96	0.90
AUTO	22376.67	-68.86	-0.31
POWER	2486.43	-27.57	-1.10
REALTY	2639.92	-18.44	-0.69
BSE IT	28078.95	156.71	0.56
BANKEX	36770.43	-304.82	-0.82
OIL GAS	14932.19	-58.72	-0.39
METAL	16156.39	-181.61	-1.11
INDIA VIX	19.79	-0.53	-2.60

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	1069	843	100
BSE	1610	1298	170

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	4020	6431	(37)
NSE CASH	70792	71811	(1)
NSE F&O	2234467	8504305	(74)

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	33.53	4.24	0.97
SENSEX	34.29	3.33	0.73

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	5225	5496	(271)
FII	6308	6961	(654)

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	3657.40	4296.88	(639)
Index Options	248099.35	246560.97	1538
Stock Futures	11221.87	11888.11	(666)
Stock Options	13595.11	13749.18	(154)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.29	1.20
BANK NIFTY	0.71	0.73

SECURITIES BAN FOR TRADE IN F&O FOR 12-04-2021

SAIL

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.017	6.017	0.00
USA	1.657	1.632	1.51

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	92.18	92.05	0.13

CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
28-Apr -21 USD-INR	74.81	-0.01	-0.02
28-Apr -21 EUR-INR	88.91	0.11	0.12
28-Apr -21 GBP-INR	102.58	-0.20	-0.19
28-Apr -21 JPY- INR	68.24	-0.14	-0.20

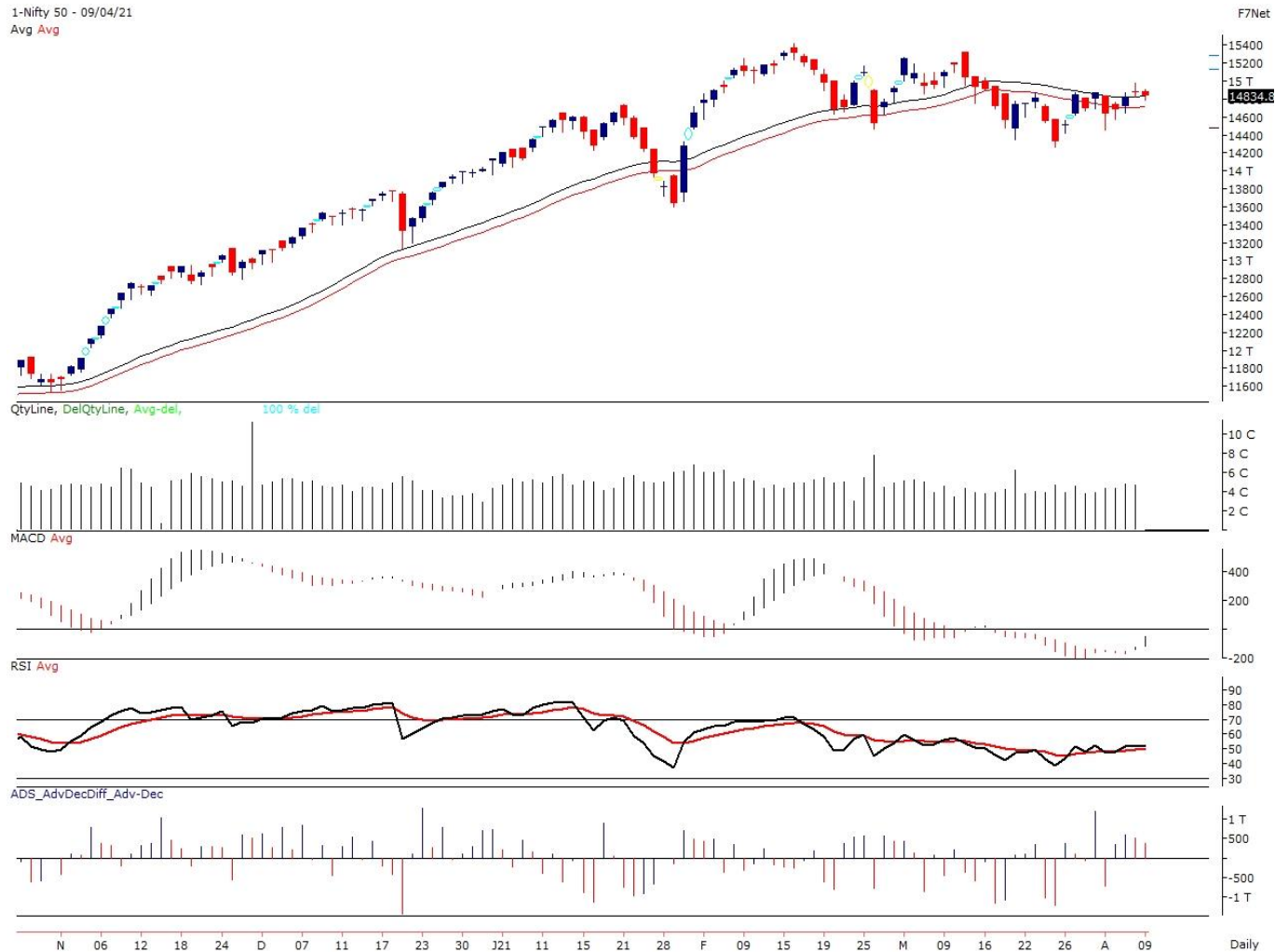
KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1741	-13.14	-0.75
Silver	25.21	-0.19	-0.76
Crude-Oil	59.34	-0.26	-0.44
Brent-Crude	63.05	-0.15	-0.24

INDEX TREND ANALYSIS

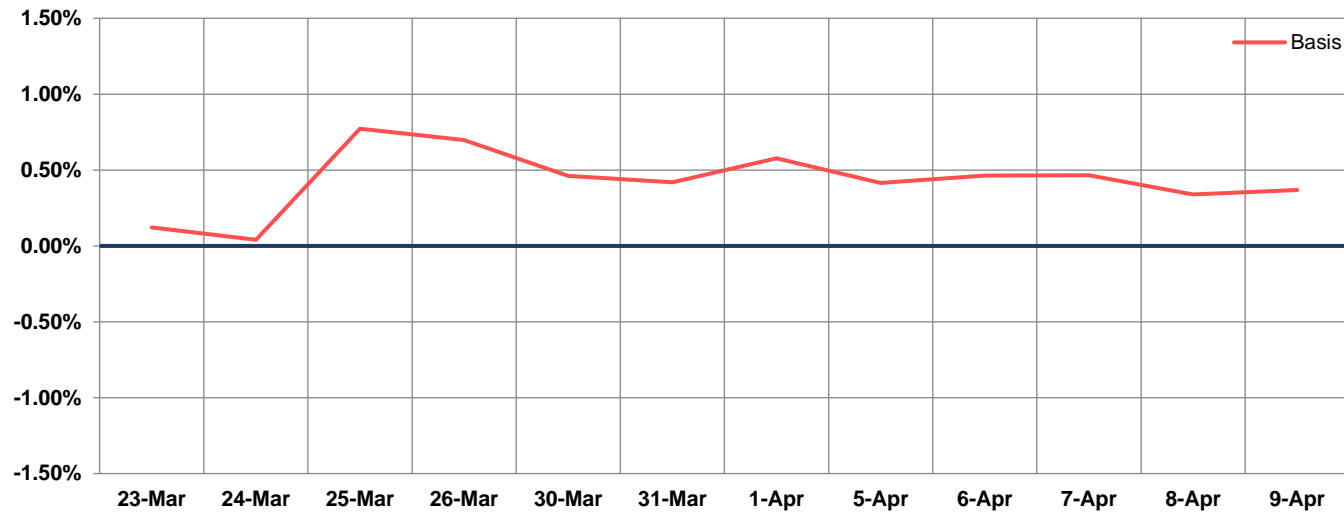
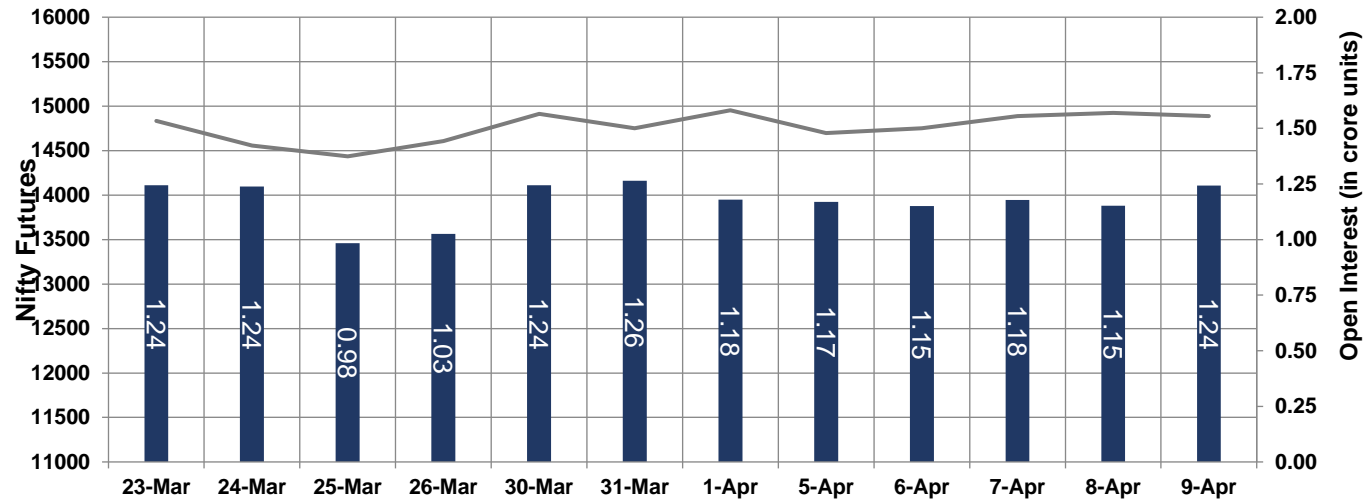
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	14835	14714	14774	14846	14907	14979	Neutral	Buy	Buy
SENSEX	49591	49207	49399	49653	49845	50099	Neutral	Buy	Buy
NIFTY FUTURES	14893	14733	14813	14890	14970	15048	Neutral	Buy	Buy
BANK NIFTY	32448	31941	32195	32583	32837	33226	Sell	Neutral	Buy
CNX IT	27367	26922	27145	27332	27555	27743	Buy	Buy	Buy
CNX MIDCAP	24506	24276	24391	24536	24651	24795	Buy	Buy	Buy
CNX SMALLCAP	8559	8479	8519	8553	8593	8627	Buy	Buy	Buy
INDIA VIX	19.79	18.86	19.32	20.14	20.61	21.43	Sell	Sell	Buy

NIFTY TECHNICAL & INDICES LEVEL

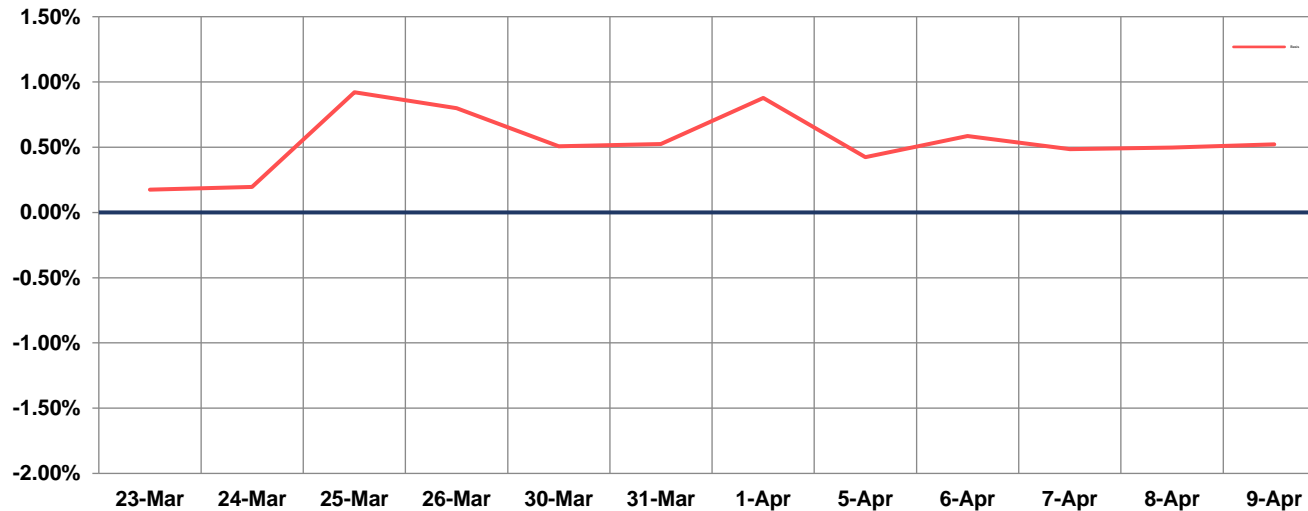
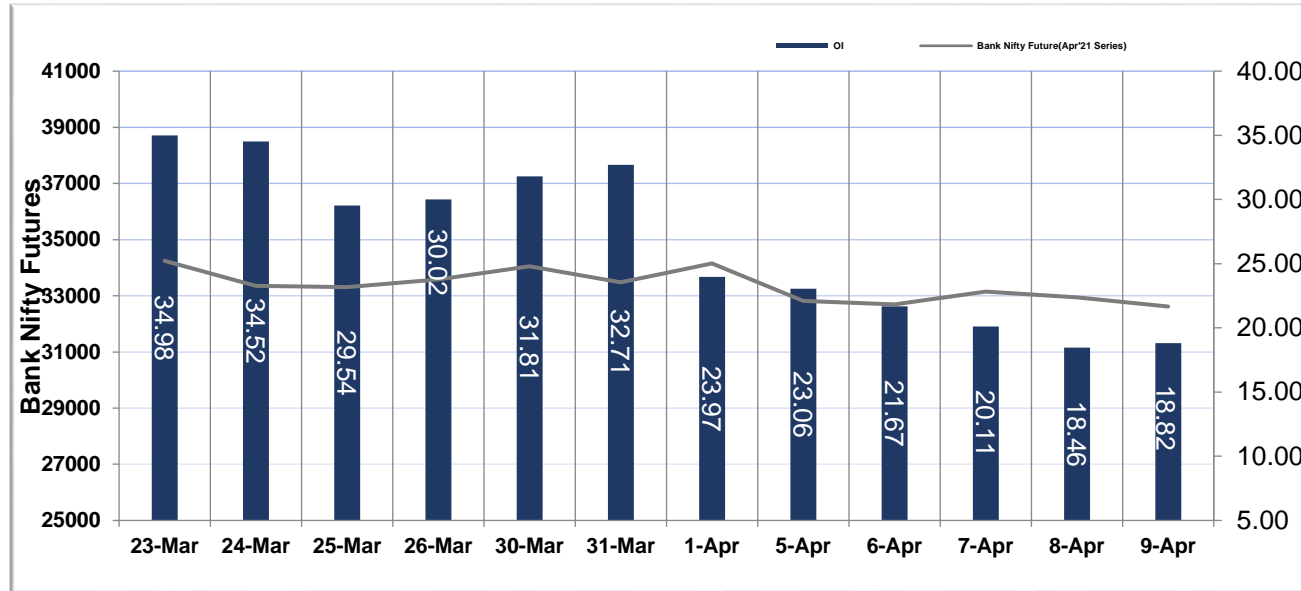


- Nifty Cash prices have settled at **14834.85** down by 0.26 percent from the previous close. On the upper side it has resistance of **14970** and **15110** levels, while lower side it has support of **14760** and **14635** levels. Intraday traders should be cautious and take position accordingly.

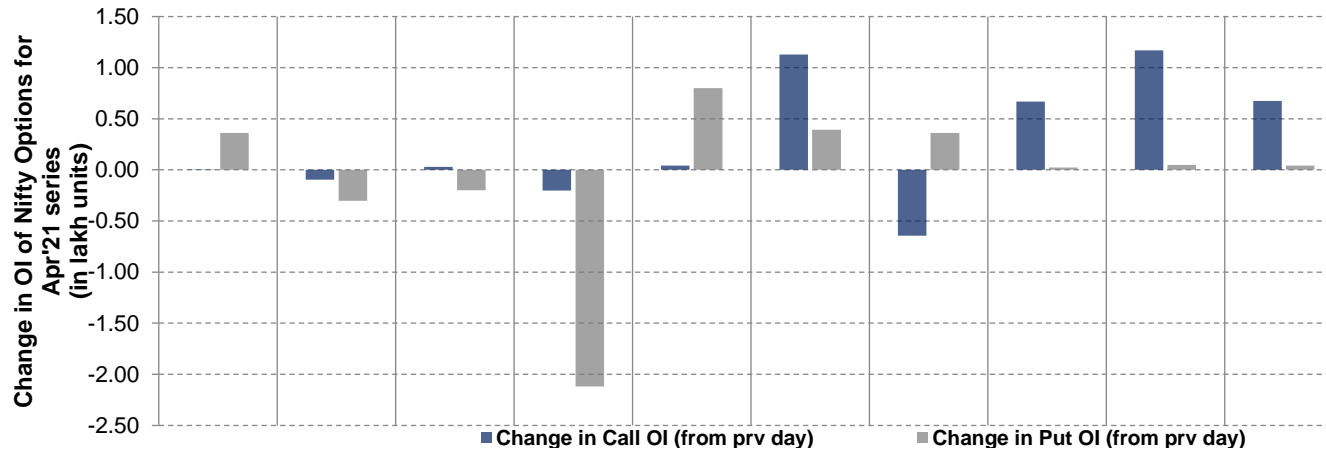
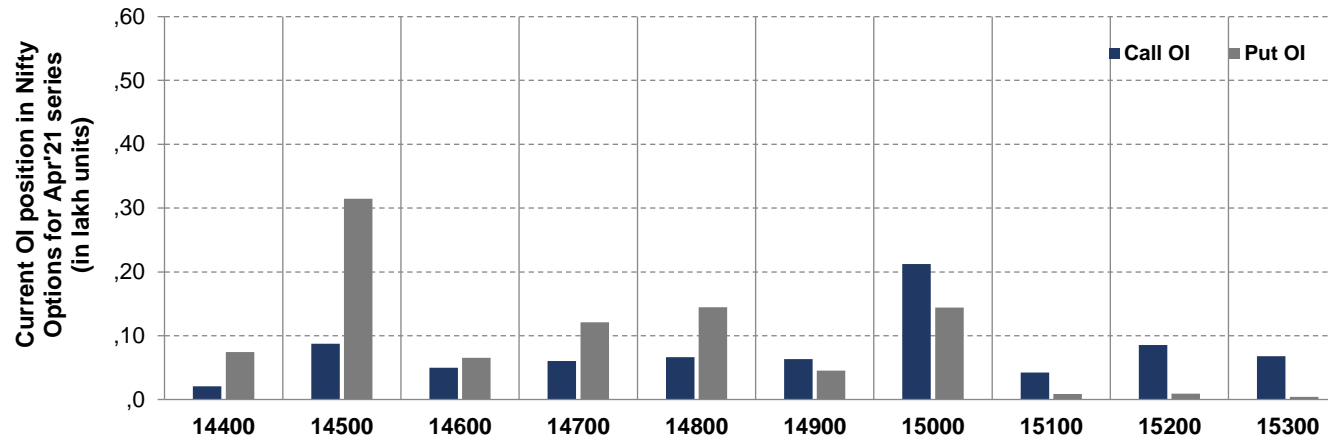
NIFTY FUTURES



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 0.06 million in open interests.
- Among Nifty puts 14,500 SP from the April month expiry was the most active put with a reduction of 0.03 million in open interests.
- The maximum OI outstanding for Calls was at 15,000 SP (2.12mn) and that for Puts was at 14,500 SP (3.15mn)

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