

# 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

The last trading day of the week ended slightly higher, with both Sensex and Nifty ending in green terrain. After a cautious start of the day, key indices remained higher for the most part of the trading session, aided with the government data showing that the country's exports jumped by 60.29 per cent to \$34.45 billion in March even as the outbound shipments contracted by 7.26 per cent during the full 2020-21 fiscal to \$290.63 billion. Imports too grew by 53.74 per cent to \$48.38 billion in March, but dipped by 18 per cent to \$389.18 billion during April-March 2020-21.

Markets held gains during the day. Traders got relief, as with a view to streamlining regulations and reducing compliance burden of regulated entities, the Reserve Bank of India (RBI) has set up the second Regulatory Review Authority (RRA 2.0). The RRA would be set up for a period of one year from May 1, 2021, unless its tenure is extended by the Reserve Bank. Besides, Reserve Bank of India (RBI) concluded the first security acquisition programme (G-SAP) auction buying of Rs 25,000 crore in government bonds. As part of this, the government is scheduled to buy bonds worth 1 lakh crore from the secondary market in the three months to June 30 (Q1 of the current financial year).

In the last hour of the trading session, indices cut most of their gains but managed to end the trading day in green terrain, after Union minister Nitin Gadkari said that India tackled the first wave of the pandemic with great resilience and came out with strong growth projections, exuding confidence that the MSME sector will battle the second wave with same conviction and lead India to a growth trajectory. Meanwhile, India reported 216,850 coronavirus disease (Covid-19) cases, the highest single-day spike so far since the pandemic broke out.

On the global front, European markets were trading higher after strong U.S. and China data spurred optimism about a speedy global recovery, while strong results from Germany's Daimler boosted carmakers. Asian markets ended higher on Friday after China's gross domestic product expanded 18.3 percent on year in the first quarter of 2021. The National Bureau of Statistics said that was shy of estimates for a jump of 19.0 percent but was up sharply from the 6.5 percent growth in the fourth quarter of 2020. The bureau also said that industrial production was up 14.1 percent on year in March - missing forecasts for a gain of 17.2 percent and slowing from the 35.1 percent growth in February.

## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	48832.03	28.35	0.06
NIFTY	14617.85	36.40	0.25
MIDCAP	20157.36	233.78	1.17
SMLCAP	21018.55	218.86	1.05
-BSEFMC	12918.81	74.23	0.58
AUTO	22179.00	258.50	1.18
POWER	2452.39	30.98	1.28
REALTY	2483.20	-9.50	-0.38
BSE IT	26829.81	82.60	0.31
BANKEK	36287.32	-185.83	-0.51
OIL GAS	14749.57	49.87	0.34
METAL	16107.03	93.88	0.59
INDIA VIX	20.40	-0.49	-2.33

## ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	1131	762	107
BSE	1654	1240	166

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	3883	4853	(20)
NSE CASH	66184	70792	(7)
NSE F&O	2170509	9251859	(77)

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	32.84	4.18	0.98
SENSEX	33.95	3.31	0.74

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

FII-DII*	Buy	Sell	Net
DII	5524	4866	658
FII	7512	7075	438

Note: FII & DII Figures are provisional

## FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	4857.22	4802.52	55
Index Options	245564.54	242436.64	3128
Stock Futures	12341.74	11292.62	1049
Stock Options	14475.95	14679.87	(204)

## PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.38	1.13
BANK NIFTY	0.90	1.09

## SECURITIES BAN FOR TRADE IN F&O FOR 19-04-2021

SAIL
SUNTV

## 10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.089	6.126	-0.60
USA	1.590	1.530	3.95

## DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	91.54	91.62	-0.09

## CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
28-Apr -21 USD-INR	74.55	-0.66	-0.88
28-Apr -21 EUR-INR	89.34	-0.63	-0.70
28-Apr -21 GBP-INR	102.71	-0.83	-0.80
28-Apr -21 JPY- INR	68.55	-0.57	-0.83

## KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1777.89	13.99	0.79
Silver	26.03	0.19	0.76
Crude-Oil	63.01	-0.45	-0.71
Brent-Crude	66.63	-0.32	-0.48

## INDEX TREND ANALYSIS

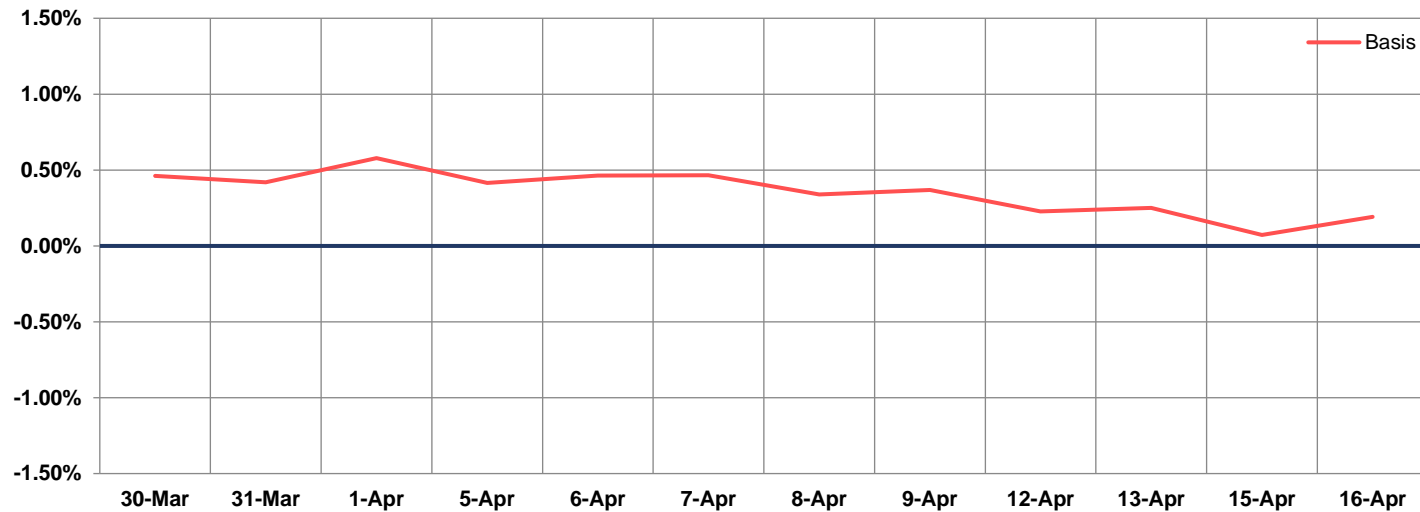
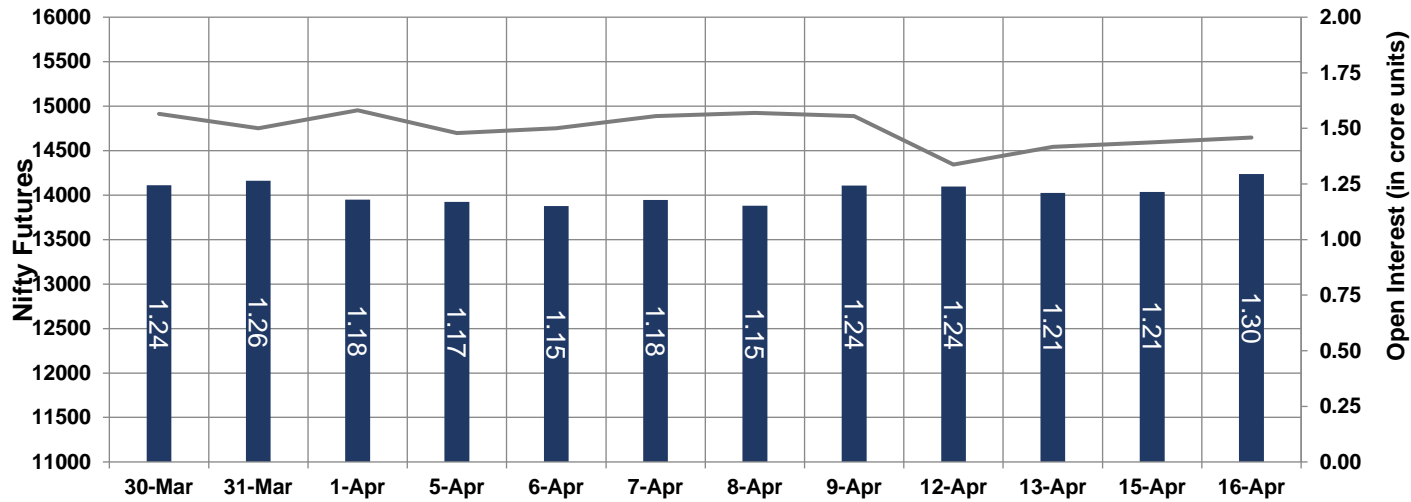
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	14618	14486	14552	14625	14691	14764	Neutral	Neutral	Buy
SENSEX	48832	48477	48655	48872	49050	49267	Neutral	Neutral	Buy
NIFTY FUTURES	14624	14496	14560	14647	14711	14798	Neutral	Neutral	Buy
BANK NIFTY	31977	31658	31818	32072	32231	32485	Sell	Neutral	Buy
CNX IT	26325	25965	26145	26311	26491	26656	Neutral	Buy	Buy
CNX MIDCAP	23761	23364	23562	23726	23924	24088	Neutral	Neutral	Buy
CNX SMALLCAP	8264	8142	8203	8247	8308	8353	Buy	Neutral	Buy
INDIA VIX	20.40	18.71	19.56	20.32	21.17	21.93	Sell	Sell	Buy

## NIFTY TECHNICAL & INDICES LEVEL

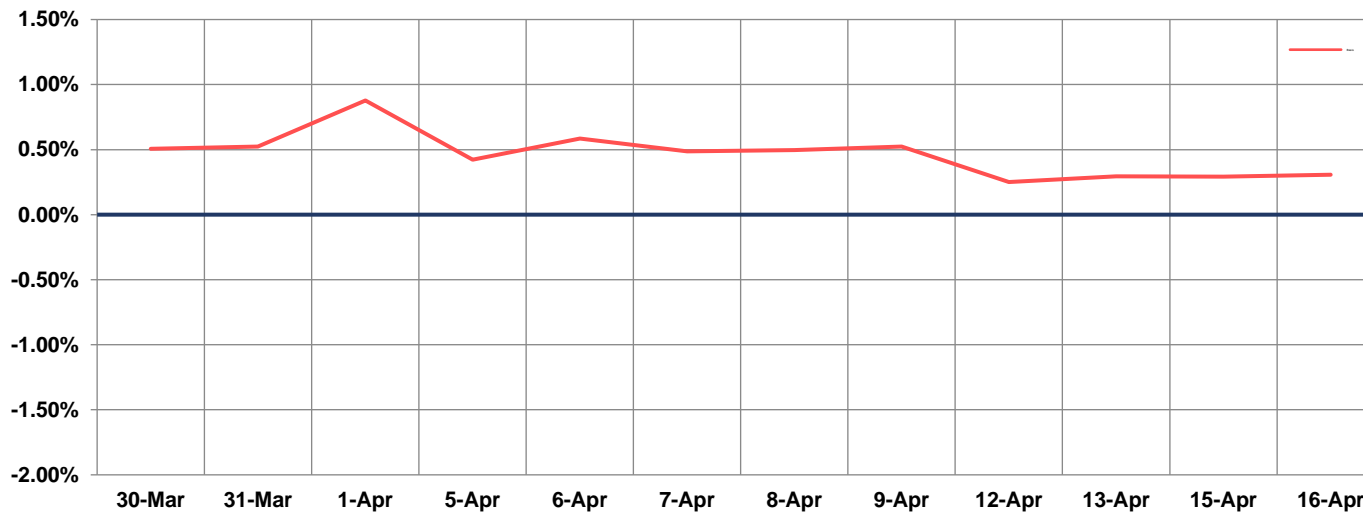
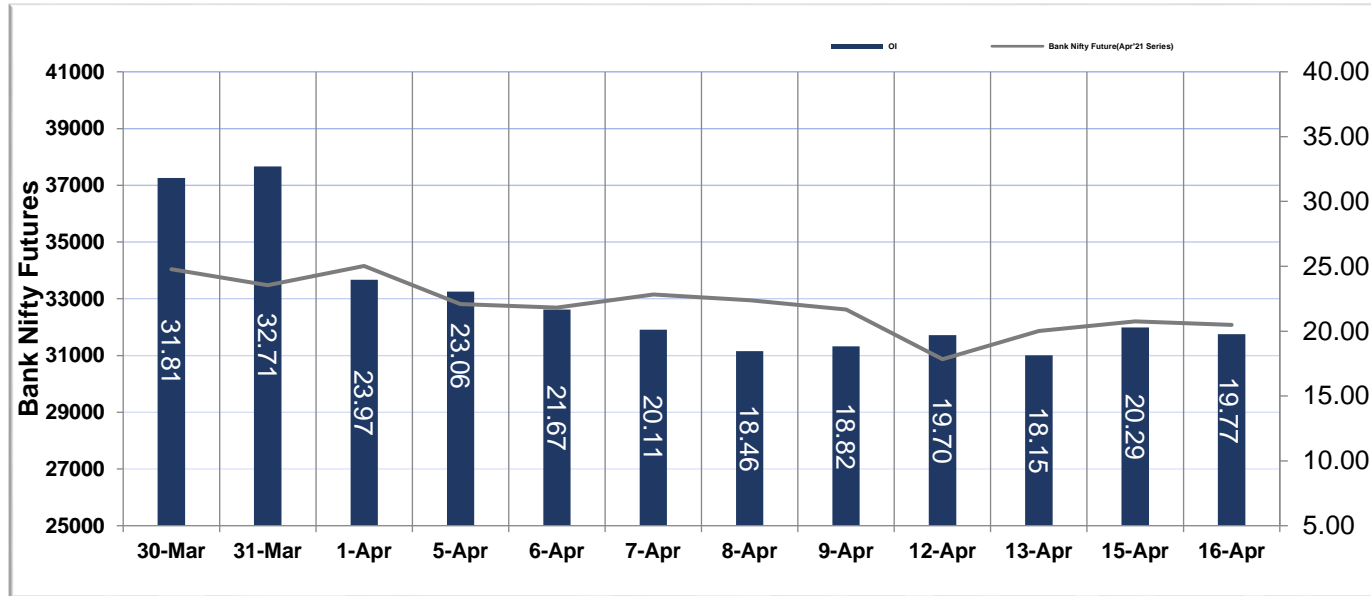


- Nifty Cash prices have settled at **14617.85** up by 0.25 percent from the previous close. On the upper side it has resistance of **14730** and **14870** levels, while lower side it has support of **14370** and **14260** levels. Intraday traders should be cautious and take position accordingly.

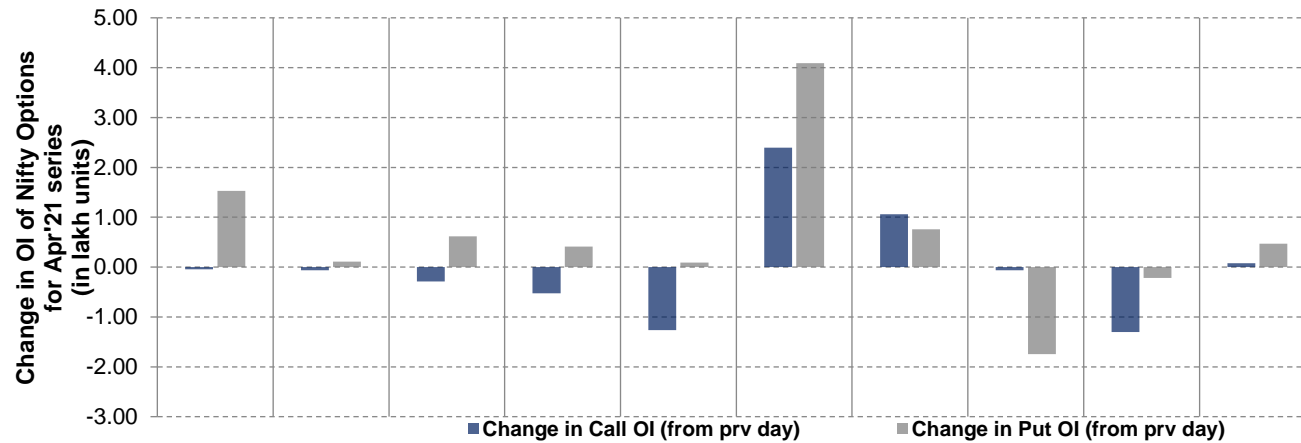
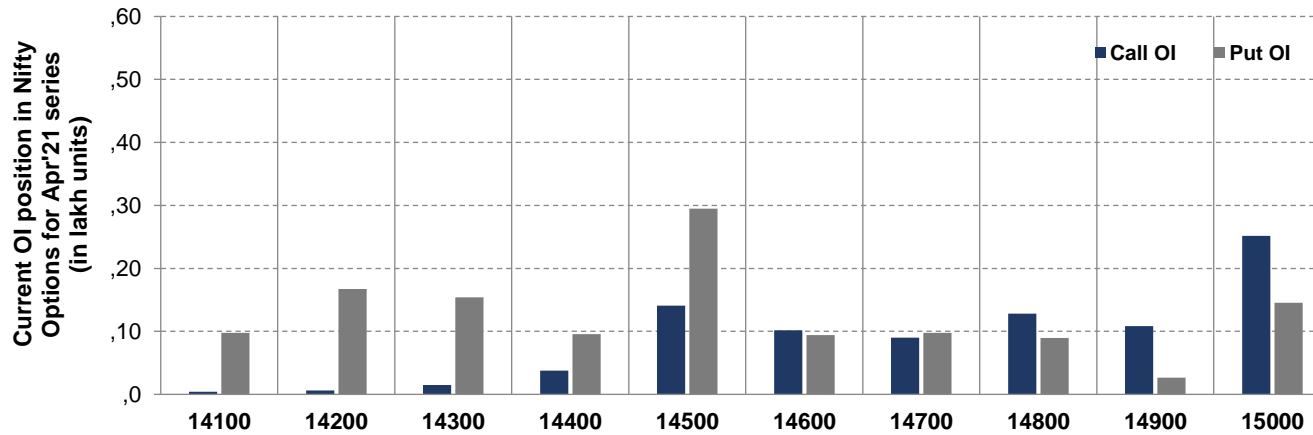
## NIFTY FUTURES



## BANK NIFTY FUTURES



## NIFTY OPTIONS



- Among Nifty calls 15,000 SP from the April month expiry was the most active call with an addition of 0.01 million in open interests.
- Among Nifty puts 14,500 SP from the April month expiry was the most active put with an addition of 0.01 million in open interests.
- The maximum OI outstanding for Calls was at 15,000 SP (2.52mn) and that for Puts was at 14,500 SP (2.95mn)



## 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.