

# Morning Mantra

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

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## MARKET COMMENTARY

Indian equity benchmarks ended marginally higher on Thursday. The start of the day was on a strong note, as strong earnings reports from top Indian companies supported the sentiment on the Street. Domestic sentiments were positive, amid a report that the Finance Ministry has waived permissions required from any government departments for customs clearance of COVID-related relief material imported by the Indian Red Cross Society. Besides, in order to guard domestic players from cheap shipments, India has imposed anti-dumping duty on imports of a chemical used in foam making from four regions, including the EU and Saudi Arabia, for five years.

In late morning deals, key indices cut all of their gains and turned negative, as a domestic rating agency -- Icra in its latest report has said the ongoing second wave of COVID-19 will dampen the pace of recovery for corporate India and the contact-intensive sectors will be hit the most. However, it stated the impact of the second wave on many sectors is set to be lower than the first because the lockdowns are less widespread and stringent as of now as against the strong nationwide lockdown last year which brought all economic activities to a grinding halt.

Despite volatility, markets managed to remain higher for most part of the session. Traders took a note of report that the Reserve Bank announced the launch of the latest round of households' surveys to capture inflation expectations and consumer confidence, which provides useful inputs for its monetary policy. The central bank has been regularly conducting these surveys. But, massive surge in coronavirus cases capped gains in the markets. India reported a massive surge of 379,459 cases and 3,647 deaths, thus marking the biggest single-day spike ever, Worldometer showed.

On the global front, European markets were trading mostly in green as markets react to the US Federal Reserve's decision to hold interest rates near zero and digest a fresh round of corporate earnings. Asian markets ended mostly higher on Thursday, after the Asian Development Bank forecast developing Asia to rebound this year although the renewed outbreak of the coronavirus poses threat to the recovery. According to the latest Asian Development Outlook 2021, released Wednesday, economic growth in developing Asia will rebound to 7.3 percent this year from -0.2 percent last year, underpinned by global recovery and early progress in vaccination. However, growth will moderate to 5.3 percent in 2022.

## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	49765.94	32.10	0.06
NIFTY	14894.90	30.35	0.20
MIDCAP	20445.44	-36.11	-0.18
SMLCAP	21686.04	27.60	0.13
BSEFMC	12634.48	-36.22	-0.29
AUTO	21980.74	-243.05	-1.09
POWER	2494.41	-5.05	-0.20
REALTY	2483.48	-1.82	-0.07
BSE IT	26523.58	-24.12	-0.09
BANKEK	38302.37	28.72	0.08
OIL GAS	14801.31	49.17	0.33
METAL	17809.63	885.55	5.23
INDIA VIX	23.30	0.72	3.21

## ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	866	1041	100
BSE	1373	1574	175

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	4590	4542	1
NSE CASH	75923	74332	2
NSE F&O	9943970	4353206	128

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	32.79	4.26	0.99
SENSEX	32.90	3.33	0.80

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

FII-DII*	Buy	Sell	Net
DII	4222	5165	(942)
FII	6399	5590	809

Note: FII & DII Figures are provisional

## FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	9370.44	10018.78	(648)
Index Options	1098647.95	1096167.50	2480
Stock Futures	25364.05	24882.81	481
Stock Options	13740.62	12593.27	1147

## PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.34	1.57
BANK NIFTY	1.22	1.46

## SECURITIES BAN FOR TRADE IN F&O FOR 30-04-2021

NIL
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## 10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.063	6.053	0.17
USA	1.677	1.620	3.52

## DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	90.69	90.60	0.09

## CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
27 May-21 USD-INR	74.70	-0.35	-0.47
27 May-21 EUR-INR	90.21	0.05	0.05
27 May-21 GBP-INR	103.70	0.14	0.14
27 May-21 JPY- INR	68.31	-0.25	-0.36

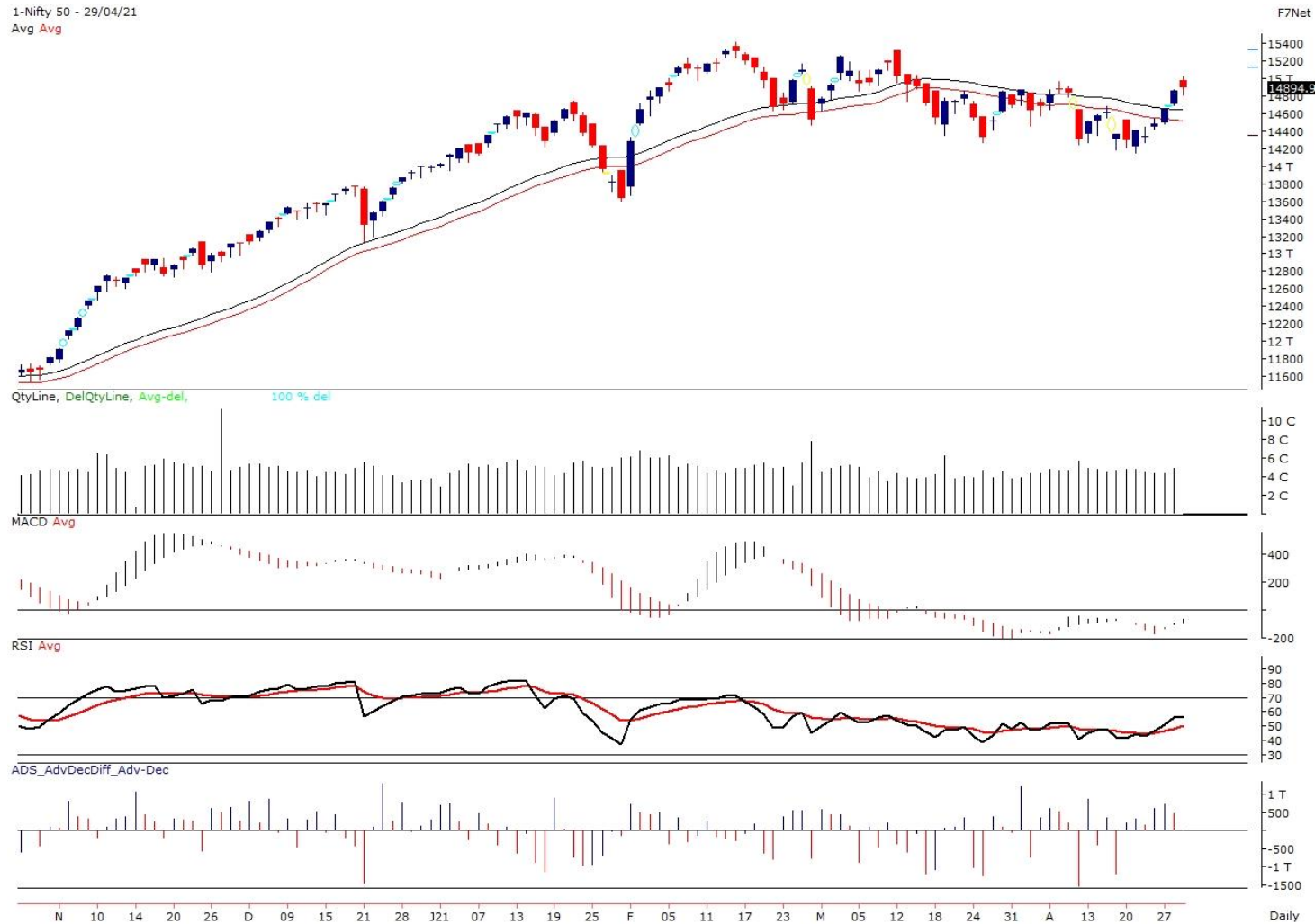
## KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1768.88	-15.00	-0.84
Silver	25.97	-0.34	-1.28
Crude-Oil	64.76	0.90	1.41
Brent-Crude	68.31	1.04	1.58

## INDEX TREND ANALYSIS

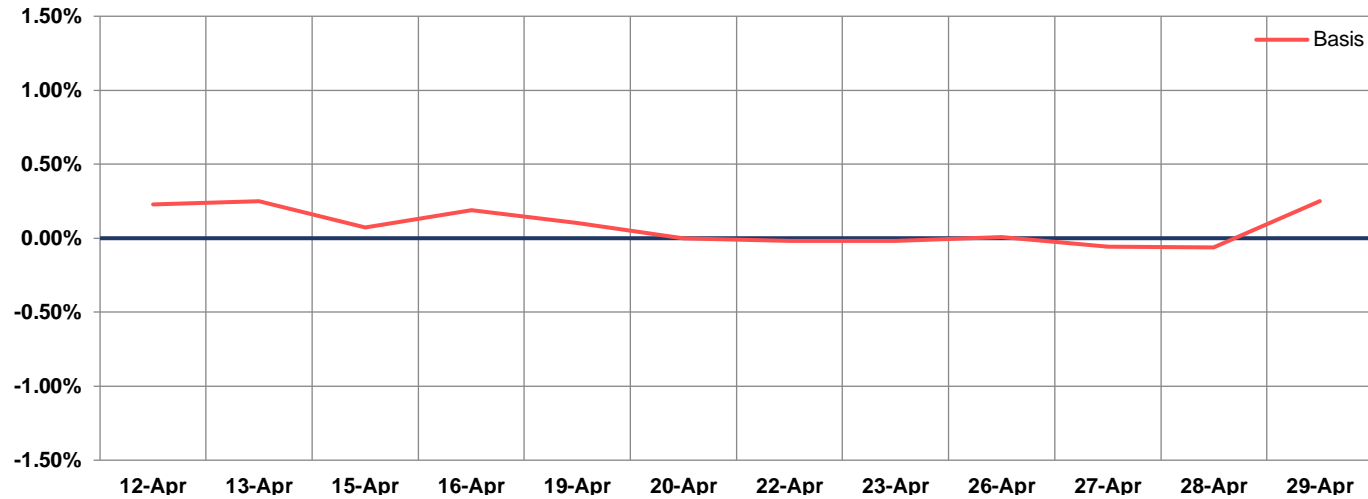
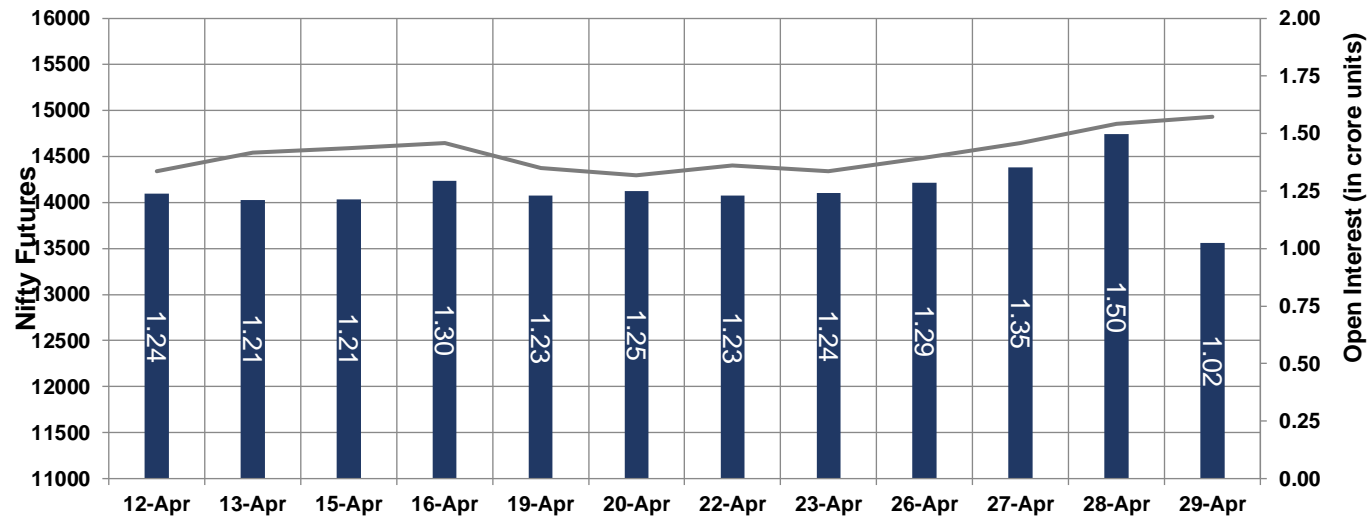
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	14895	14688	14791	14918	15021	15148	Neutral	Neutral	Buy
SENSEX	49766	49053	49409	49893	50249	50732	Neutral	Neutral	Buy
NIFTY FUTURES	14897	14692	14795	14915	15017	15138	Neutral	Neutral	Buy
BANK NIFTY	33715	32786	33250	33769	34233	34751	Neutral	Neutral	Buy
CNX IT	25874	25620	25747	25955	26082	26290	Neutral	Neutral	Buy
CNX MIDCAP	24286	23973	24130	24351	24508	24730	Buy	Neutral	Buy
CNX SMALLCAP	8599	8464	8532	8584	8652	8704	Buy	Neutral	Buy
INDIA VIX	23.30	21.63	22.46	22.94	23.78	24.25	Buy	Neutral	Buy

## NIFTY TECHNICAL & INDICES LEVEL

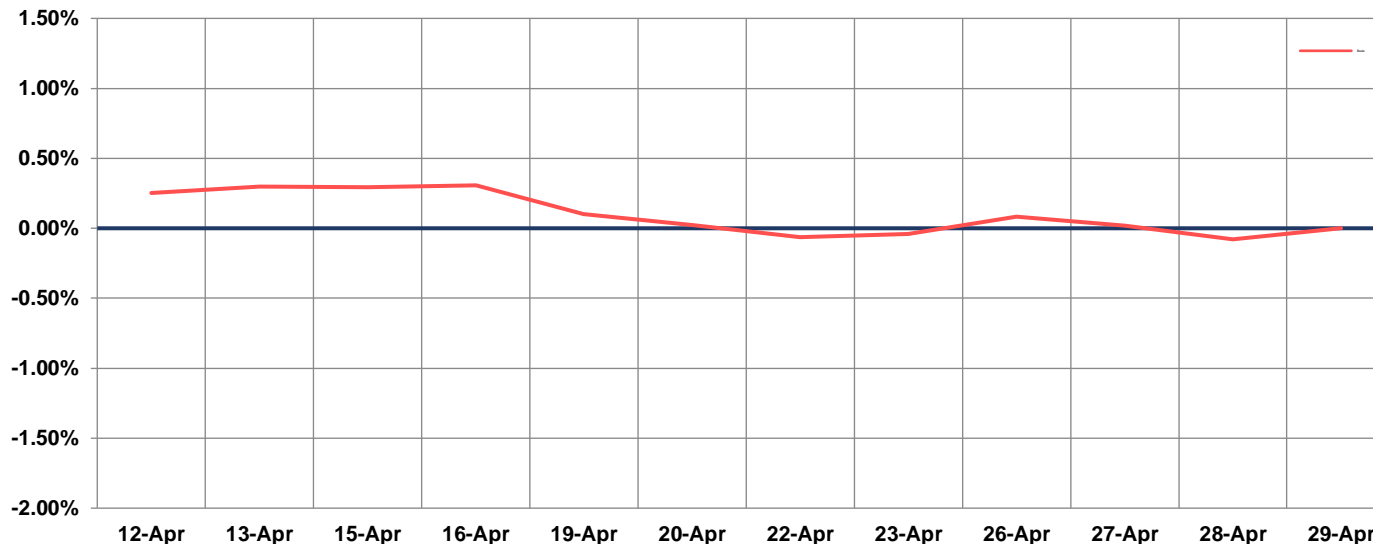
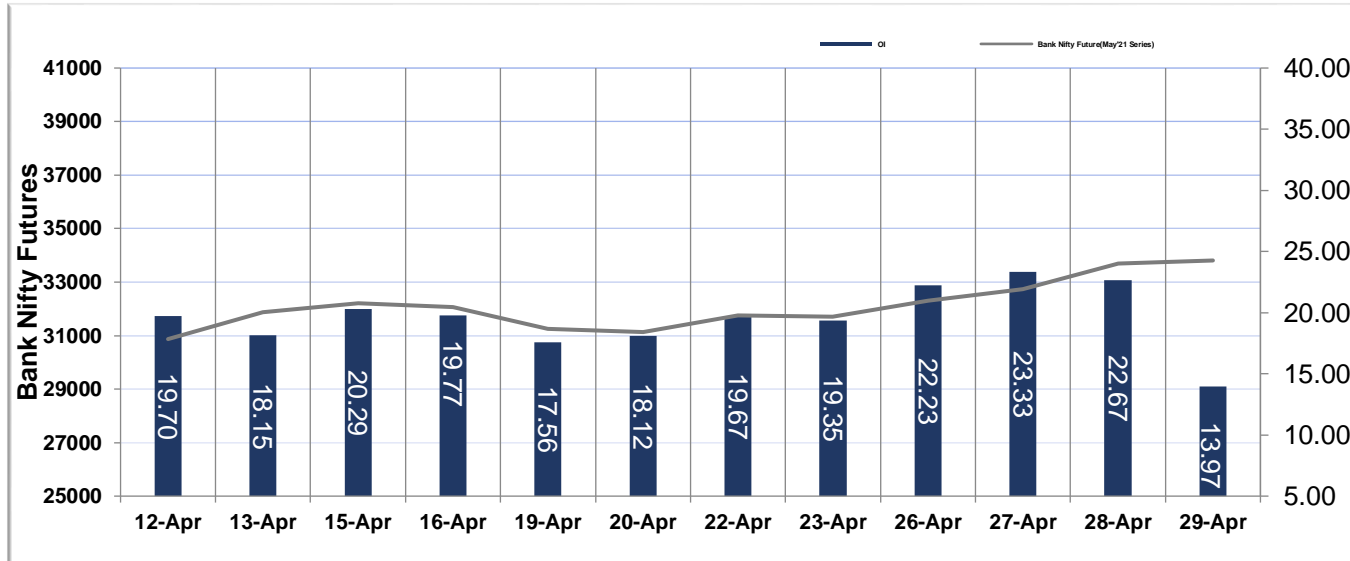


➤ Nifty Cash prices have settled at **14894.90** up by 0.20 percent from the previous close. On the upper side it has resistance of **14990** and **15120** levels, while lower side it has support of **14790** and **14630** levels. Intraday traders should be cautious and take position accordingly.

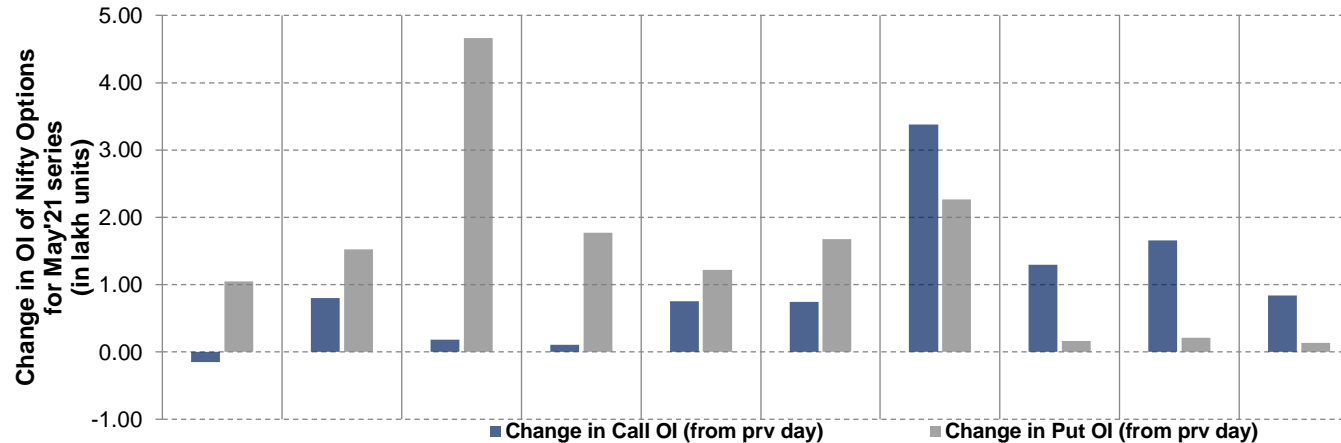
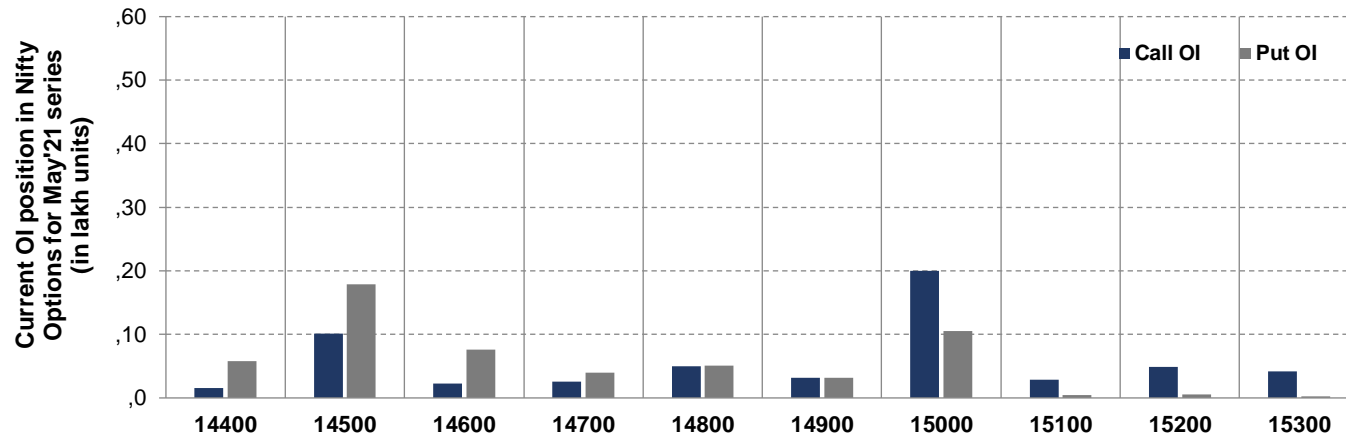
## NIFTY FUTURES



## BANK NIFTY FUTURES



## NIFTY OPTIONS



- Among Nifty calls 15,000 SP from the May month expiry was the most active call with an addition of 0.34 million in open interests.
- Among Nifty puts 14,500 SP from the May month expiry was the most active put with an addition of 0.15 million in open interests.
- The maximum OI outstanding for Calls was at 15,000 SP (2.00mn) and that for Puts was at 14,500 SP (1.80mn)



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