

Morning Mantra

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

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MARKET COMMENTARY

Indian equity benchmarks ended near their intraday low points on Friday's trading session. After a negative start, markets remained lower for the whole day, amid persistent rise in Covid cases and hiccups in vaccination drive. Breaking all records, India reported a massive surge of 386,888 cases, Worldometer showed. Besides, Mumbai for instance announced halting vaccination programme for three days due to the non-availability of vaccine stock. Adding more pessimism, the Centre for Monitoring Indian Economy stated that the unemployment rate in India has shot up in the first two weeks of April and the monthly unemployment rate is likely to be close to 8% compared to 6.5% in March with lower absorption of labour in the market.

Weak trade persisted over the Dalal Street, as indices added more losses in the second half of the trading session. Traders got cautious, amid a private report stating that there has been an over 28 per cent increase in suspected fraudulent digital transaction attempts against businesses originating from India in the pandemic year. Market participants took a note of report that markets regulator Sebi said mutual funds will have to make a disclosure about scheme risk-o-meter, performance and portfolio details to investors only for the particular plans in which they have invested. Traders overlooked report that Ministry of Finance, Government of India has decided to provide an additional amount of upto Rs 15,000 crore to States as interest free 50 year loan for spending on capital projects.

On the global front, European markets were trading higher helped by further evidence that the region is recovering from the pandemic-influenced slump. Asian markets ended lower on Friday, even after China's manufacturing sector grew at the fastest pace in four months in April. The survey results from IHS Markit showed that the Caixin manufacturing Purchasing Managers' Index rose to 51.9 in April from an 11-month low of 50.6 in March. A score above 50 indicates expansion in the sector. Driven by improved market conditions and greater customer demand, total new orders grew for the eleventh straight month in April.

MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	48782.36	-983.58	-1.98
NIFTY	14631.10	-263.80	-1.77
MIDCAP	20312.20	-133.24	-0.65
SMLCAP	21670.11	-15.93	-0.07
BSEFMC	12508.59	-125.89	-1.00
AUTO	21667.80	-312.94	-1.42
POWER	2481.15	-13.26	-0.53
REALTY	2468.20	-15.28	-0.62
BSE IT	26305.95	-217.63	-0.82
BANKEX	37304.97	-997.40	-2.60
OIL GAS	14995.68	194.37	1.31
METAL	17821.58	11.95	0.07
INDIA VIX	23.03	-0.28	-1.19

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	799	1086	104
BSE	1320	1630	165

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	4694	4590	2
NSE CASH	80615	75923	6
NSE F&O	2240692	9943970	(77)

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	32.21	4.19	1.00
SENSEX	32.10	3.25	0.82

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	5762	4342	1419
FII	7951	11416	(3465)

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	3742.21	6705.42	(2963)
Index Options	256197.56	251336.27	4861
Stock Futures	15344.43	14683.46	661
Stock Options	12191.08	12713.52	(522)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.07	1.34
BANK NIFTY	0.82	1.22

SECURITIES BAN FOR TRADE IN F&O FOR 03-05-2021

SUNTV

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.030	6.030	0.00
USA	1.631	1.640	-0.54

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	91.20	90.61	0.65

CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
27 May-21 USD-INR	74.36	-0.01	-0.02
27 May-21 EUR-INR	89.90	-0.28	-0.31
27 May-21 GBP-INR	103.48	-0.19	-0.18
27 May-21 JPY- INR	68.38	0.07	0.10

KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1765.95	-7.18	-0.40
Silver	25.89	-0.21	-0.81
Crude-Oil	63.50	-1.51	-2.32
Brent-Crude	67.24	-1.32	-1.93

INDEX TREND ANALYSIS

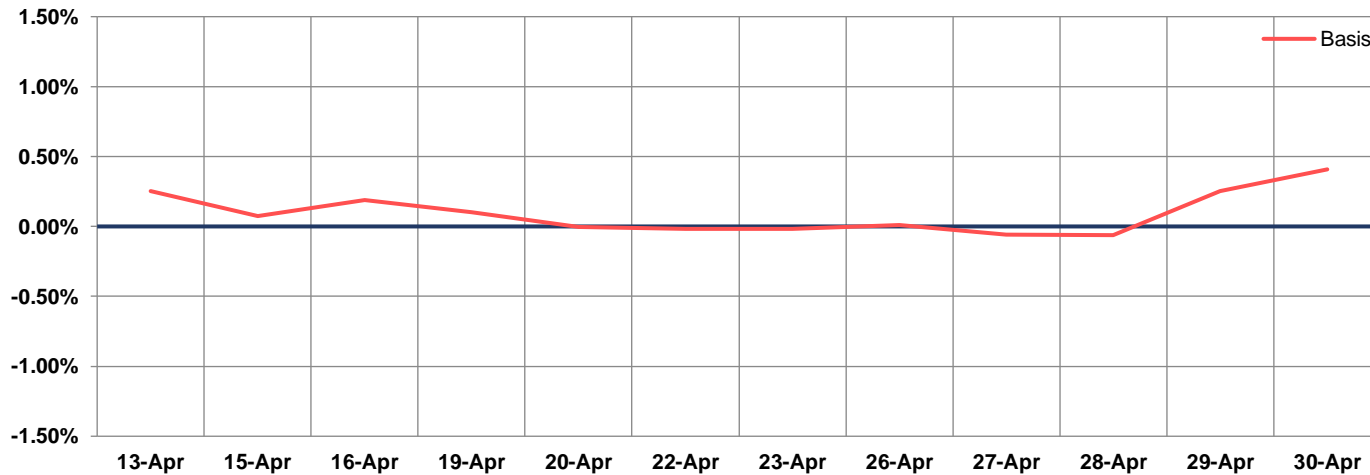
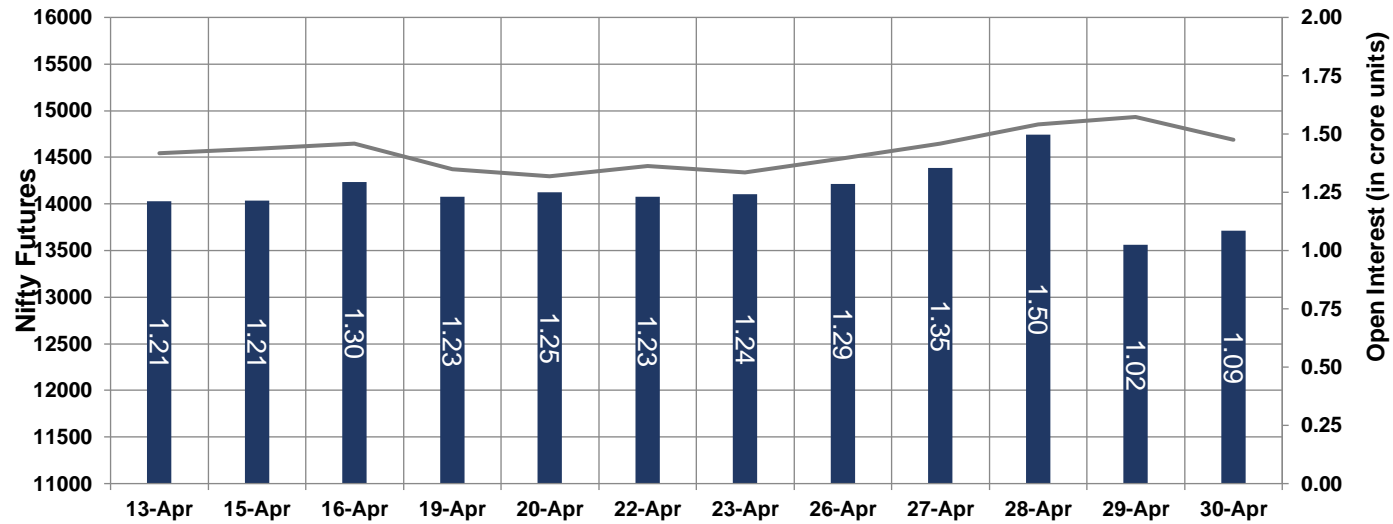
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	14631	14442	14537	14696	14790	14950	Neutral	Buy	Buy
SENSEX	48782	48145	48464	49017	49335	49888	Neutral	Buy	Buy
NIFTY FUTURES	14660	14507	14584	14737	14813	14967	Neutral	Buy	Buy
BANK NIFTY	32782	32175	32478	32967	33270	33759	Neutral	Neutral	Buy
CNX IT	25664	25244	25454	25804	26015	26365	Sell	Neutral	Buy
CNX MIDCAP	24196	23835	24016	24213	24393	24591	Buy	Buy	Buy
CNX SMALLCAP	8565	8458	8512	8578	8632	8699	Buy	Buy	Buy
INDIA VIX	23.03	21.96	22.50	23.13	23.66	24.30	Buy	Neutral	Neutral

NIFTY TECHNICAL & INDICES LEVEL

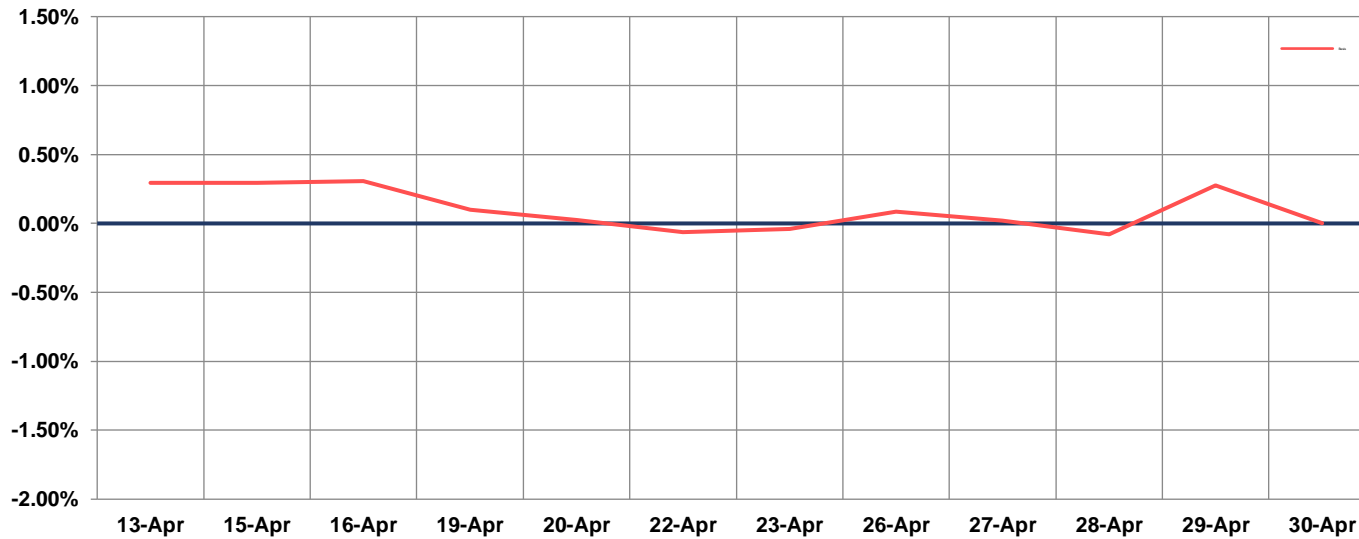
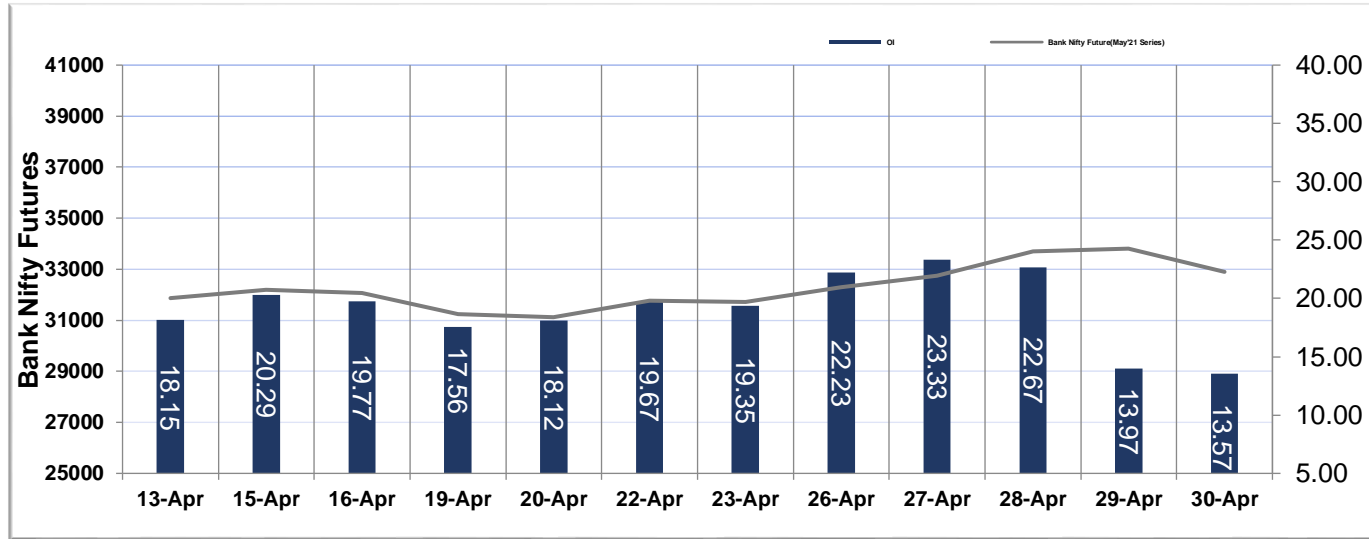


- Nifty Cash prices have settled at **14631.10** down by 1.77 percent from the previous close. On the upper side it has resistance of **14790** and **14880** levels, while lower side it has support of **14550** and **14435** levels. Intraday traders should be cautious and take position accordingly.

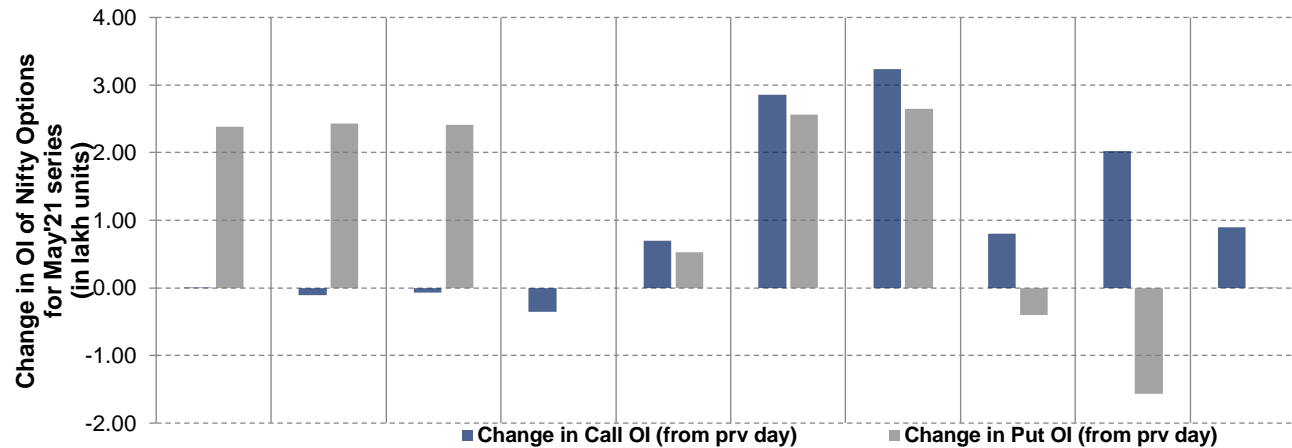
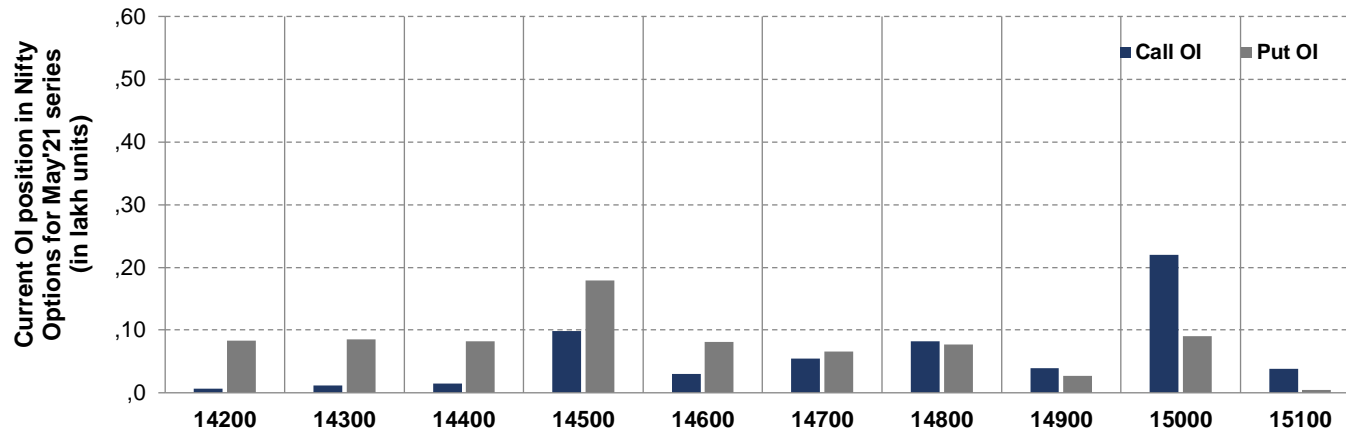
NIFTY FUTURES



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 0.20 million in open interests.
- Among Nifty puts 14,500 SP from the May month expiry was the most active put with a reduction of 0.01 million in open interests.
- The maximum OI outstanding for Calls was at 15,000 SP (2.20mn) and that for Puts was at 14,500 SP (1.80mn)

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