

Morning Mantra

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

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MARKET COMMENTARY

Indian equity benchmarks ended lower on Tuesday. After a positive start, markets turned negative, as traders were concerned with the data compiled by the Centre for Monitoring Indian Economy (CMIE) showing that the second wave of the coronavirus pandemic and the resultant curbs have pushed India's unemployment rate to a four-month high of 7.97%. But soon, indices came back in green and remained higher in the first half of the trading session, amid report that Indian exporters are expecting continuous growth in the country's outbound shipments despite increase in COVID-19 cases as their order books are encouraging and there is a pick-up in demand in rich markets. Federation of Indian Export Organisations (FIEO) President S K Saraf said that in most of the states, manufacturing and exports related services have been exempted from the restrictions and inter-state movement of cargo is permitted by the central government.

In the second half of the trading session, key indices witnessed fall and finally ended the day in deep red terrain. Adding pessimism among market participants, the domestic rating agency India Ratings and Research expects the overall recovery path to be pushed back for most of the service-oriented sectors to FY22, owing to a major supply-side disruption from the second wave of COVID-19 infections. Besides, with the second wave of the pandemic disrupting supply chains for most industries, India Ratings has projected an overall 6 per cent median revenue growth for corporates this fiscal over FY20. Meanwhile, industry body CII has urged the government to take strongest national steps including curtailing economic activity to contain the spike in COVID-19 cases in the country.

On the global front, European markets were trading mostly in green as investors monitor global recovery prospects and a fresh round of corporate earnings. Asian markets settled mixed on Tuesday, after consumer prices in South Korea were up 2.3 percent on year in April. The Statistics Korea said that surpassed forecasts for 2.15 percent and was up from 1.5 percent in March. It was the highest annual reading since August 2017, which saw an inflation rate of 2.5 percent. On a monthly basis, inflation rose 0.2 percent - again beating expectations for 0.1 percent, which would have been unchanged from the previous month.

MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	48253.51	-465.01	-0.95
NIFTY	14496.50	-137.65	-0.94
MIDCAP	20220.07	-102.42	-0.50
SMLCAP	21885.69	-125.45	-0.57
BSEFMC	12612.65	-63.41	-0.50
AUTO	21493.55	-218.42	-1.01
POWER	2505.74	-6.31	-0.25
REALTY	2436.44	-12.95	-0.53
BSE IT	26135.44	-191.10	-0.73
BANKEK	36758.38	-211.89	-0.57
OIL GAS	14989.74	107.32	0.72
METAL	17965.35	-117.22	-0.65
INDIA VIX	23.01	-0.68	-2.88

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	778	1136	97
BSE	1328	1637	176

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	5964	4691	27
NSE CASH	79049	70886	12
NSE F&O	3728947	3048845	22

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	30.47	4.15	1.01
SENSEX	30.88	3.12	0.86

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	4953	3965	987
FII	5849	7621	(1772)

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	5055.89	5343.49	(288)
Index Options	414776.74	412906.52	1870
Stock Futures	14806.34	13628.32	1178
Stock Options	12642.16	12709.15	(67)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	0.92	1.07
BANK NIFTY	0.77	0.84

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

SUNTV

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.015	6.001	0.23
USA	1.562	1.606	-2.72

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	91.23	90.94	0.32

CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
27 May-21 USD-INR	74.25	-0.08	-0.11
27 May-21 EUR-INR	89.23	-0.40	-0.45
27 May-21 GBP-INR	103.02	-0.11	-0.11
27 May-21 JPY- INR	67.88	-0.06	-0.08

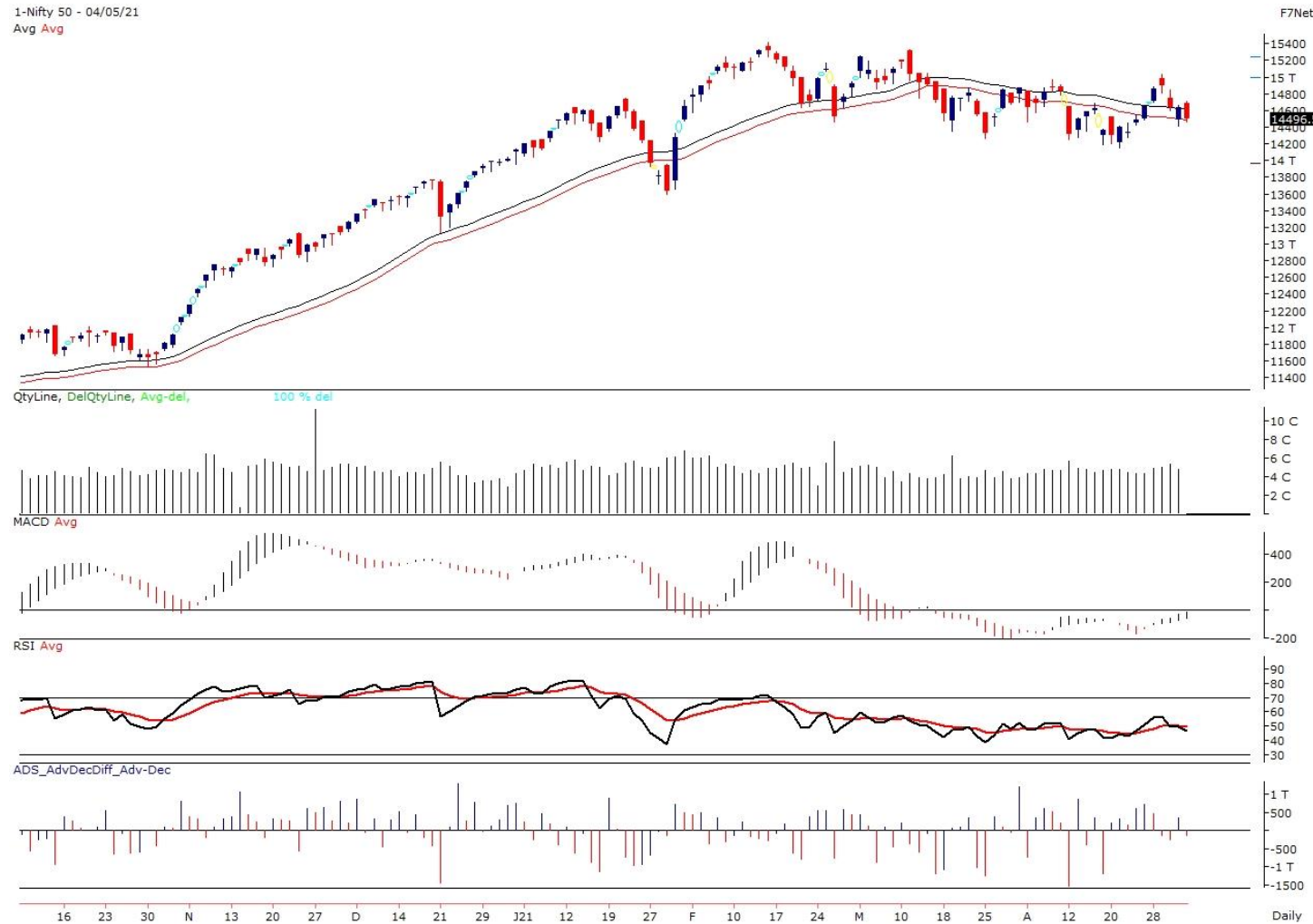
KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1794.19	1.81	0.10
Silver	26.86	-0.02	-0.10
Crude-Oil	65.08	0.58	0.90
Brent-Crude	68.29	0.74	1.07

INDEX TREND ANALYSIS

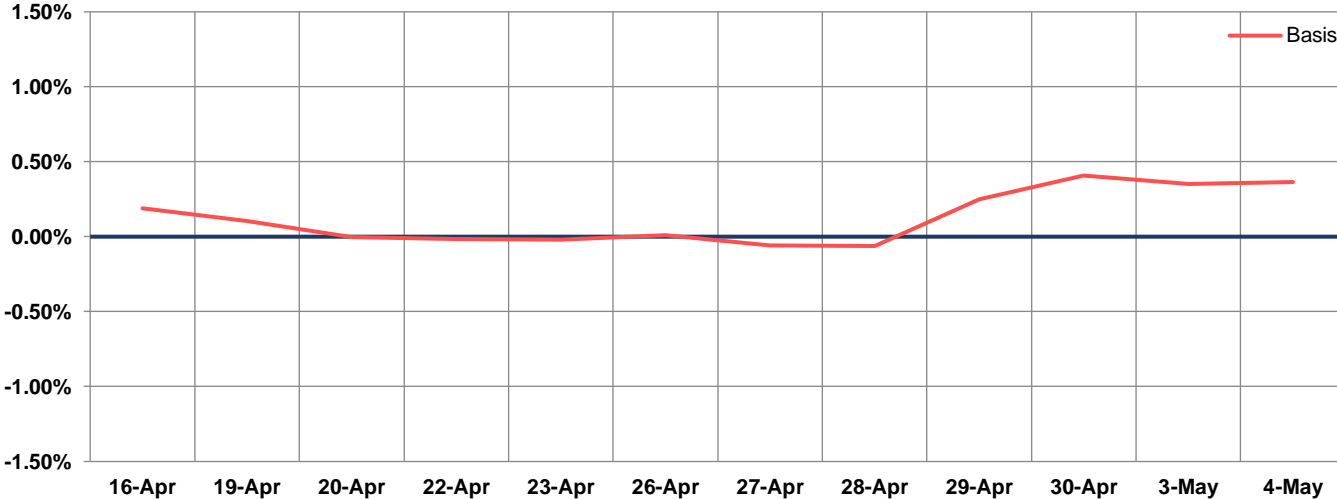
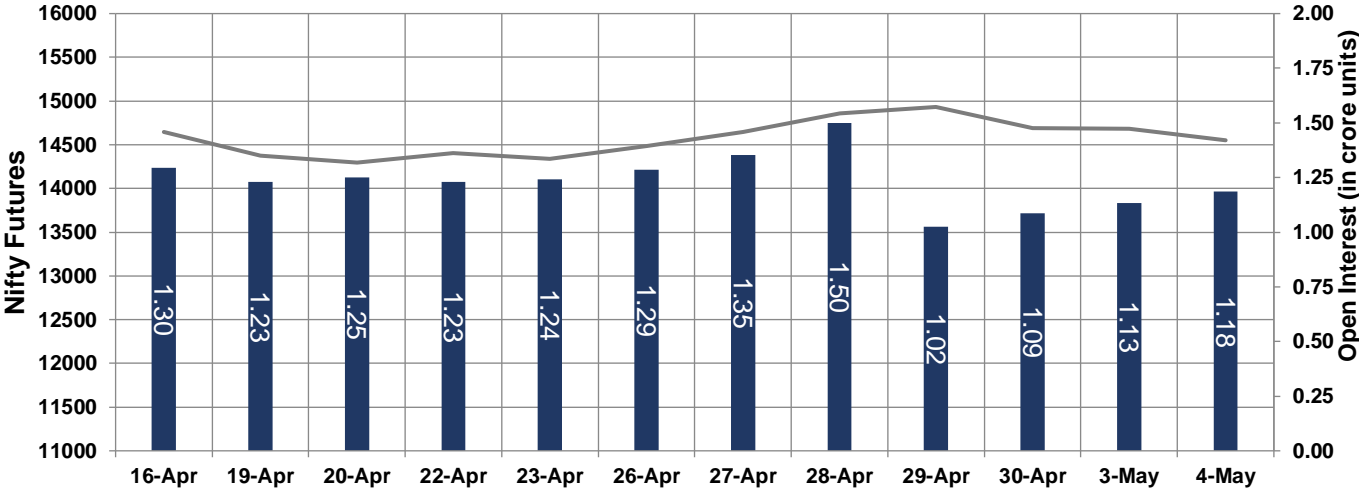
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	14497	14299	14398	14560	14659	14822	Sell	Buy	Buy
SENSEX	48254	47619	47936	46467	48784	49314	Sell	Buy	Buy
NIFTY FUTURES	14552	14355	14453	14609	14708	14863	Sell	Buy	Buy
BANK NIFTY	32270	31671	31971	32491	32791	33311	Sell	Neutral	Buy
CNX IT	25489	25161	25325	25563	25727	25965	Sell	Neutral	Buy
CNX MIDCAP	24168	23776	23972	24305	24501	24834	Buy	Buy	Buy
CNX SMALLCAP	8581	8434	8508	8639	8712	8844	Buy	Buy	Buy
INDIA VIX	23.01	21.45	22.23	22.96	23.74	24.47	Neutral	Neutral	Neutral

NIFTY TECHNICAL & INDICES LEVEL

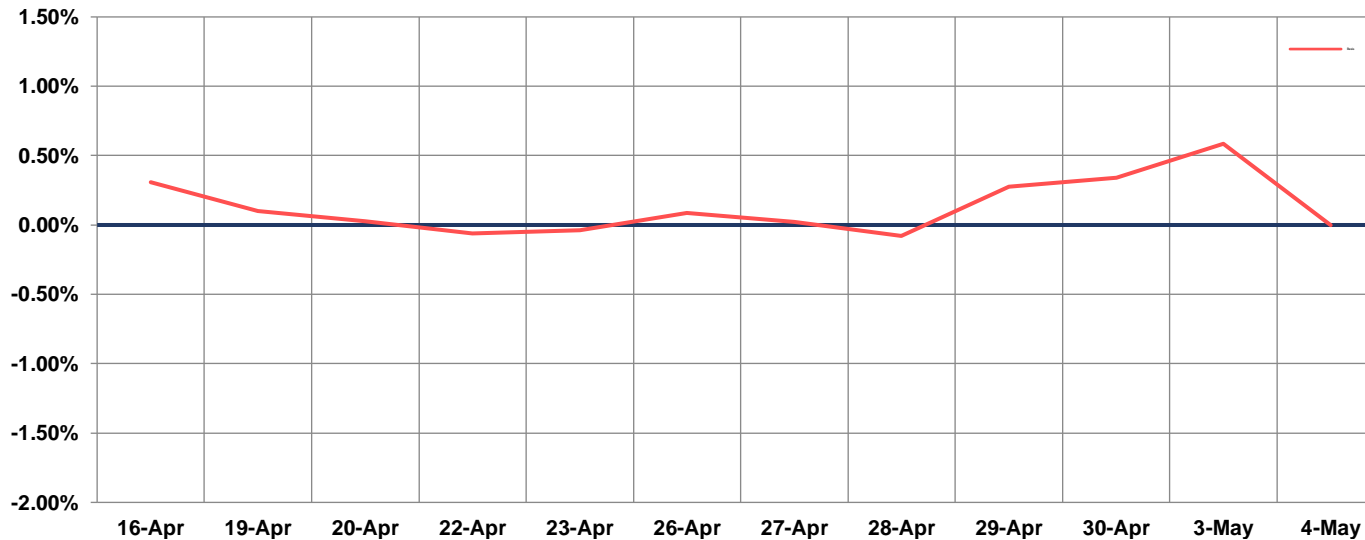


- Nifty Cash prices have settled at **14496.50** down by 0.94 percent from the previous close. On the upper side it has resistance of **14550** and **14690** levels, while lower side it has support of **14390** and **14230** levels. Intraday traders should be cautious and take position accordingly.

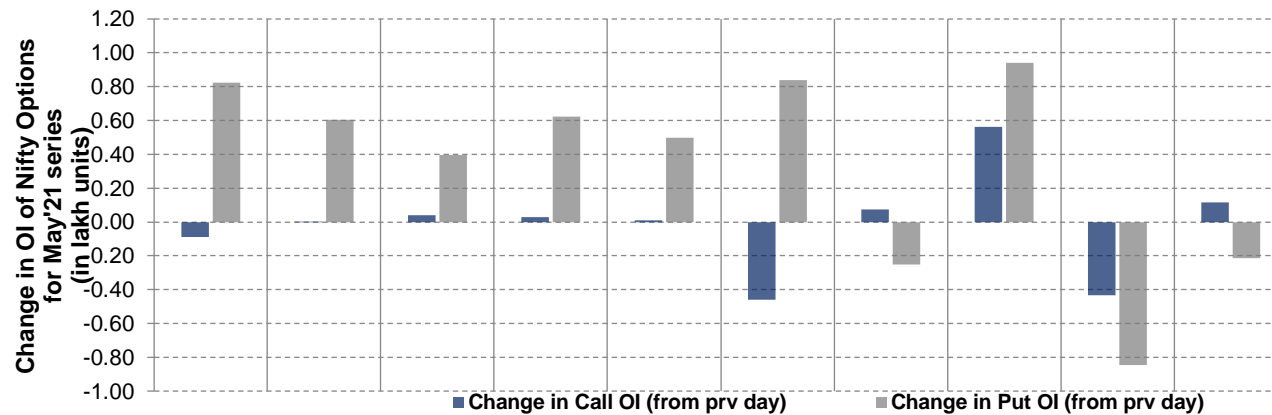
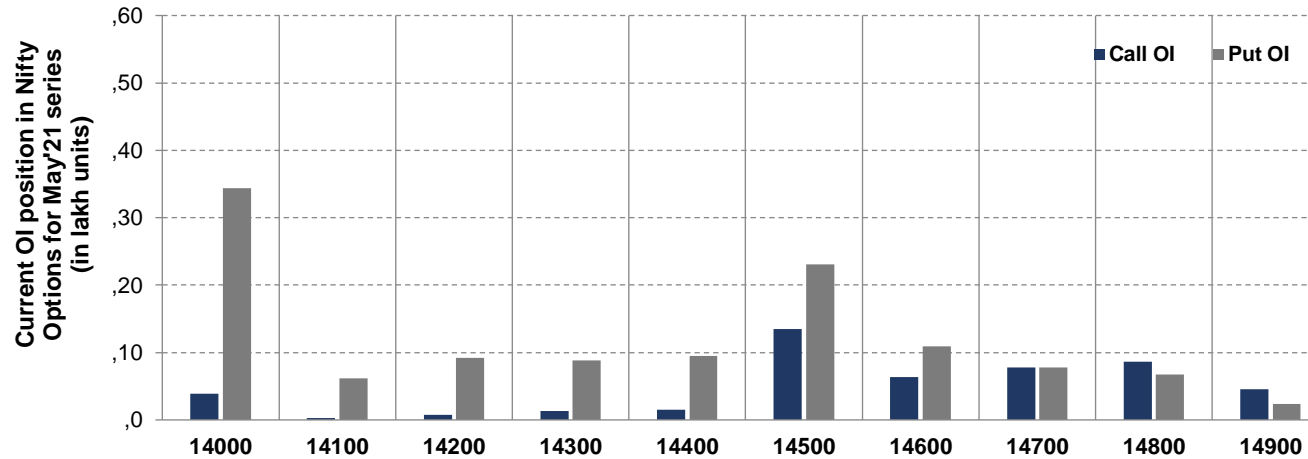
NIFTY FUTURES



BANK NIFTY FUTURES



NIFTY OPTIONS



- Among Nifty calls 14,500 SP from the May month expiry was the most active call with a reduction of 0.05 million in open interests.
- Among Nifty puts 14,000 SP from the May month expiry was the most active put with an addition of 0.08 million in open interests.
- The maximum OI outstanding for Calls was at 14,500 SP (1.35mn) and that for Puts was at 14,000 SP (3.44mn)

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