

# Morning Mantra

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

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## MARKET COMMENTARY

Indian equity benchmarks ended on a strong note on Monday's trading session. Indices made gap-up opening, as a fall in the daily Covid-19 cases aided the market sentiments. With 366,499 fresh infections, India recorded a significant drop in the number of daily Covid-19 cases. Its cumulative caseload now stands at 22,662,410, while 246,146 people have died from the deadly virus. Sentiments also got boost after the Union Health Ministry said more than 72 lakh COVID-19 vaccine doses are still available with states and union territories, while over 46 lakh doses will be received by them within the next three days.

Markets maintained their gaining momentum during the whole day. Domestic sentiments remained positive, amid reports that corporate India is stepping up to shoulder coronavirus-induced challenges by lending a helping hand through various initiatives like testing, vaccination camps, financial aid, medical help and resource access for COVID-19 care. Adding more comfort among traders, Commerce and Industry Minister Piyush Goyal said that India is committed to concluding negotiations for the proposed free trade agreement and investment protection pact with European Union (EU) together at an early date.

Firm trade continued over the Dalal Street in the second half of the trading session, as the data of the commerce ministry showed continuing a positive growth, India's exports grew by 80 per cent to \$7.04 billion during the first week of this month. Exports during May 1-7 last year stood at \$3.91 billion and \$6.48 billion in the same week of May 2019. Besides, with an aim to augment resources to the three tiers of Panchayats for fighting the contagion, the Department of Expenditure, Ministry of Finance, has released an amount of Rs 8,923.8 crore to 25 States for providing grants to the Rural Local Bodies (RLBs). The grants are meant for all the three tiers of Panchayati Raj Institutions - village, block and district.

On the global front, European markets were trading mostly in red even as reopening of economies and easy monetary policy lifted sectors that typically benefit from a recovery. Asian markets ended mostly higher on Monday, after Malaysia's unemployment rate declined marginally in March. The data from the Department of Statistics showed that the jobless rate fell to 4.7 percent in March from 4.8 percent in February. The number of unemployed persons decreased to 753,200 in March from 777,500 in the previous month. The number of employed rose by 0.4 percent monthly to 15.33 million in March from 15.27 million in the prior month.

## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	49502.41	295.94	0.60
NIFTY	14942.35	119.20	0.80
MIDCAP	20807.97	199.36	0.97
SMLCAP	22426.16	208.06	0.94
BSEFMC	12789.65	45.32	0.36
AUTO	22400.56	347.56	1.58
POWER	2616.99	54.46	2.13
REALTY	2467.62	23.09	0.94
BSE IT	2742.51	-44.41	-0.17
BANKEX	37823.66	307.47	0.82
OIL GAS	15628.42	226.32	1.47
METAL	20348.39	692.91	3.53
INDIA VIX	20.23	-0.60	-2.87

## ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	1348	641	89
BSE	2041	1073	216

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	6406	8887	(28)
NSE CASH	79581	76260	4
NSE F&O	2576381	2049035	26

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	30.43	4.28	0.98
SENSEX	31.48	3.18	0.85

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

FII-DII*	Buy	Sell	Net
DII	5852	6328	(476)
FII	6861	6277	584

Note: FII & DII Figures are provisional

## FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	2681.92	3004.01	(322)
Index Options	245491.15	242869.54	2622
Stock Futures	11750.71	13425.06	(1674)
Stock Options	12838.39	12769.85	69

## PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.33	1.33
BANK NIFTY	0.93	0.92

## SECURITIES BAN FOR TRADE IN F&O FOR 11-05-2021

NATIONALUM
PNB
SUNTV

## 10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.014	6.014	0.00
USA	1.563	1.579	-1.01

## DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	90.12	90.20	-0.08

## CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
27 May-21 USD-INR	73.55	-0.11	-0.15
27 May-21 EUR-INR	89.49	0.50	0.56
27 May-21 GBP-INR	103.69	1.20	1.17
27 May-21 JPY- INR	67.60	0.09	0.13

## KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1836.83	6.29	0.33
Silver	27.39	0.01	0.04
Crude-Oil	64.38	-0.52	-0.80
Brent-Crude	67.80	-0.51	-0.76

## INDEX TREND ANALYSIS

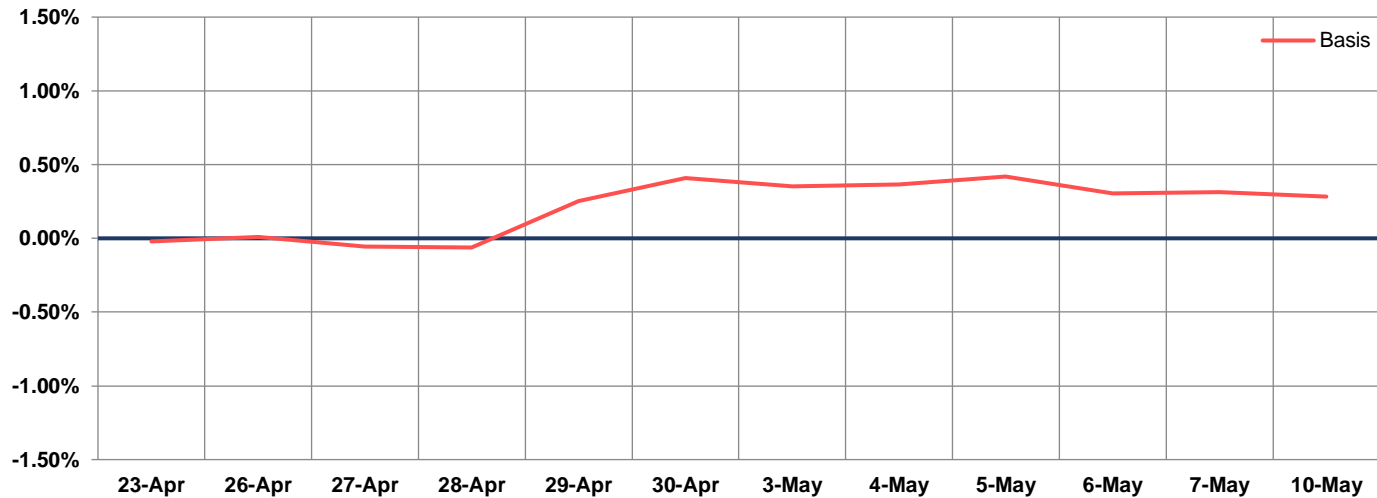
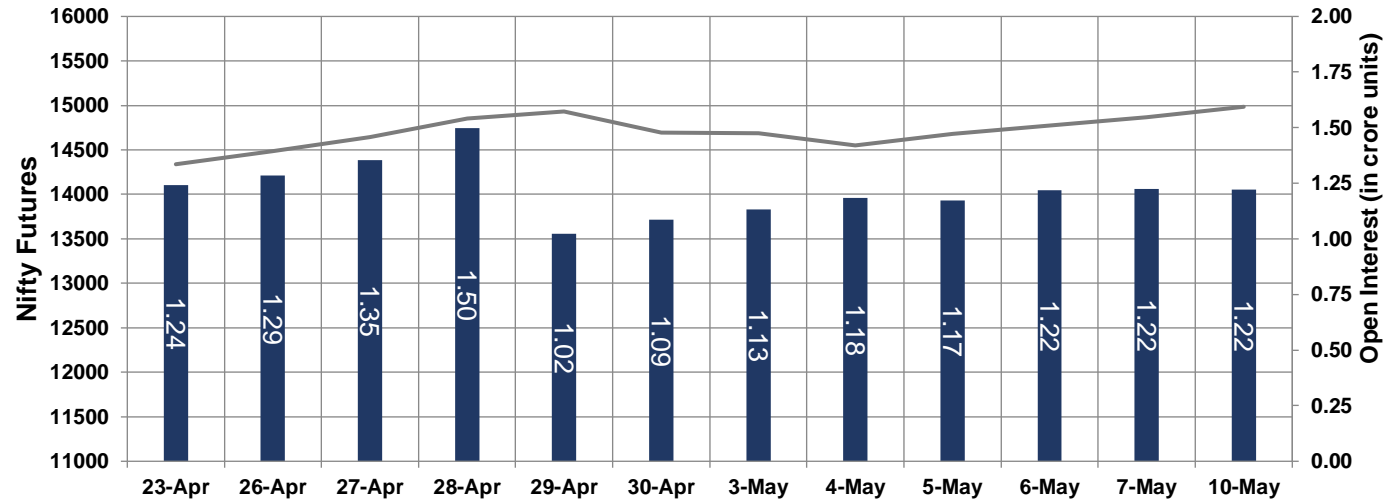
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	14942	14860	14901	14934	14975	15008	Buy	Buy	Buy
SENSEX	49502	49305	49404	49511	49609	49716	Buy	Buy	Buy
NIFTY FUTURES	14992	14901	14946	14985	15031	15069	Buy	Buy	Buy
BANK NIFTY	33142	32887	33015	33156	33284	33426	Neutral	Neutral	Buy
CNX IT	26273	25972	26123	26257	26407	26541	Buy	Buy	Buy
CNX MIDCAP	24777	24599	24688	24748	24837	24897	Buy	Buy	Buy
CNX SMALLCAP	8871	8769	8820	8854	8905	8939	Buy	Buy	Buy
INDIA VIX	20.23	19.50	19.86	20.51	20.87	21.52	Sell	Sell	Neutral

## NIFTY TECHNICAL & INDICES LEVEL

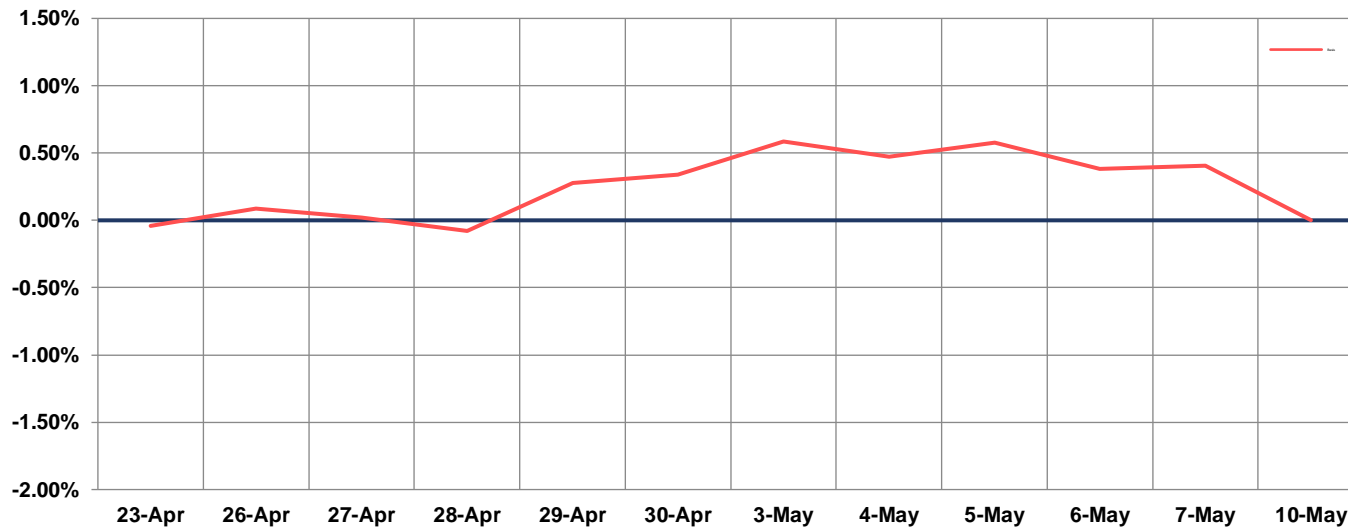
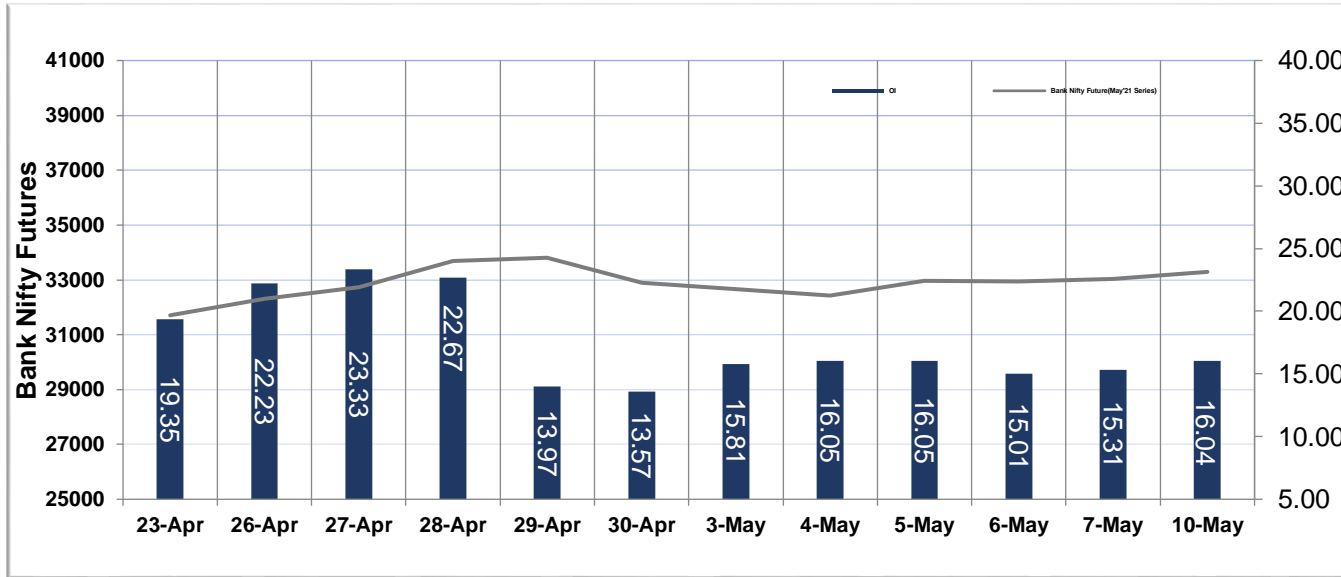


➤ Nifty Cash prices have settled at **14942.35** up by 0.80 percent from the previous close. On the upper side it has resistance of **15090** and **15140** levels, while lower side it has support of **14880** and **14790** levels. Intraday traders should be cautious and take position accordingly.

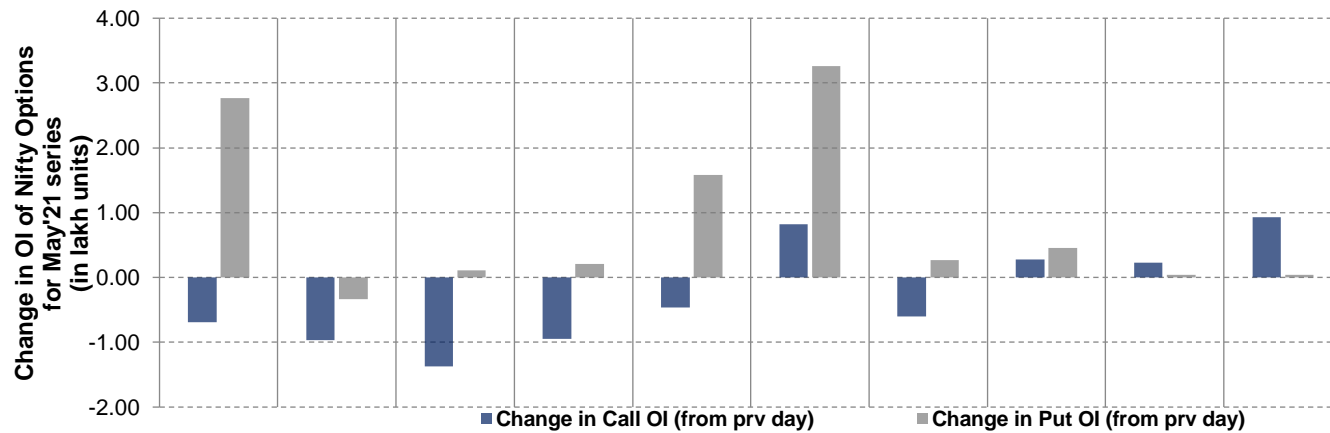
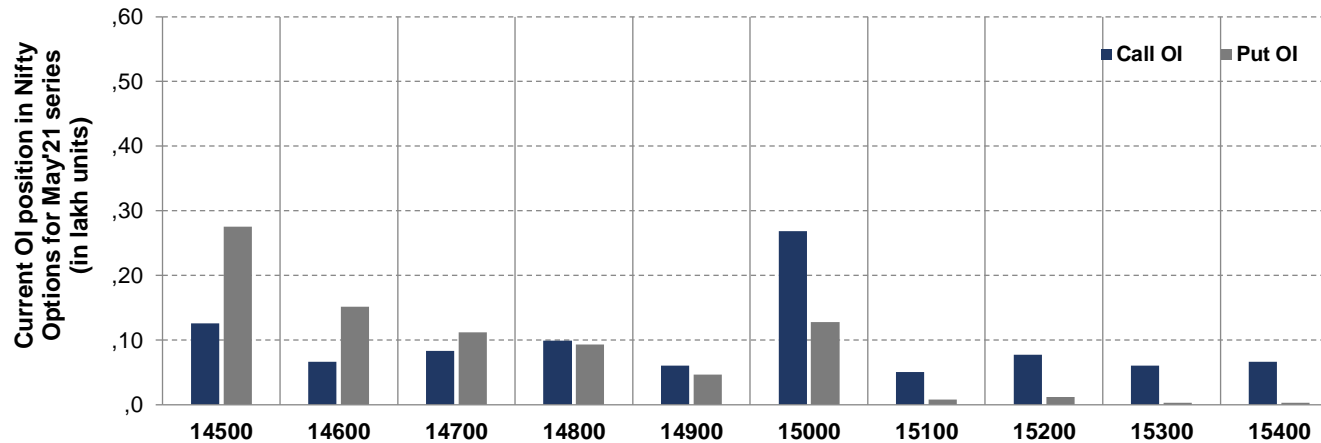
## NIFTY FUTURES



## 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 0.10 million in open interests.
- Among Nifty puts 14,500 SP from the May month expiry was the most active put with an addition of 0.30 million in open interests.
- The maximum OI outstanding for Calls was at 15,000 SP (2.70mn) and that for Puts was at 14,500 SP (2.80mn)



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