

Morning Mantra

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

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MARKET COMMENTARY

Indian equity benchmarks extended winning streak for fourth straight day and ended the Monday's trade with a gain of over half a percent amid fall in daily Covid-19 cases. Markets started the day with significant gains as traders remain encouraged 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. Union Health Ministry also stated that India is the fastest country globally to administer 17 crore COVID-19 vaccine doses. China took 119 days while the US took 115 days for reaching the same landmark. The vaccination drive in India was rolled out on January 16 with healthcare workers getting inoculated and vaccination of frontline workers started from February 2. Subsequently, it was opened for different age groups. Market participants continued to buy risky assets 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.

Market traded in fine fettle throughout the day as investors took some support from Commerce and Industry Minister Piyush Goyal's statement 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. Adding more optimism, 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. Sentiments remained upbeat till end of the trade as Reserve Bank of India's (RBI's) data showed that country's foreign exchange reserves swelled by \$3.913 billion to reach \$588.02 billion in the week ended April 30, 2021. In the previous week ended April 23, the reserves had risen by \$1.701 billion to \$584.107 billion.

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	49161.81	-340.60	-0.69
NIFTY	14850.75	-91.60	-0.61
MIDCAP	20932.96	124.99	0.60
SMLCAP	22606.17	180.01	0.80
BSEFMC	12772.27	-17.38	-0.14
AUTO	22429.33	28.77	0.13
POWER	2668.65	51.66	1.97
REALTY	2473.59	5.97	0.24
BSE IT	26552.46	-190.05	-0.71
BANKEK	37437.34	-386.32	-1.02
OIL GAS	16047.55	419.13	2.68
METAL	20129.75	-218.64	-1.07
INDIA VIX	19.83	-0.40	-0.95

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	1178	774	74
BSE	1810	1251	178

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	5759	6406	(10)
NSE CASH	82207	79581	3
NSE F&O	4273309	2576381	66

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	30.14	4.25	0.99
SENSEX	31.16	3.14	0.86

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	5172	5849	(677)
FII	6577	6913	(336)

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	3328.06	5548.22	(2220)
Index Options	392738.75	395979.20	(3240)
Stock Futures	12501.03	13591.07	(1090)
Stock Options	13793.70	13783.08	11

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.27	1.33
BANK NIFTY	0.90	0.93

SECURITIES BAN FOR TRADE IN F&O FOR 12-05-2021

CANBK
NATIONALUM
PNB
SUNTV

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.008	6.014	-0.10
USA	1.629	1.602	1.37

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	90.03	90.21	-0.20

CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
27 May-21 USD-INR	73.54	-0.01	-0.01
27 May-21 EUR-INR	89.54	0.04	0.04
27 May-21 GBP-INR	104.02	0.31	0.30
27 May-21 JPY- INR	67.74	0.12	0.18

KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1829.63	-6.34	-0.34
Silver	27.40	0.07	0.28
Crude-Oil	65.06	0.16	0.25
Brent-Crude	68.40	0.10	0.19

INDEX TREND ANALYSIS

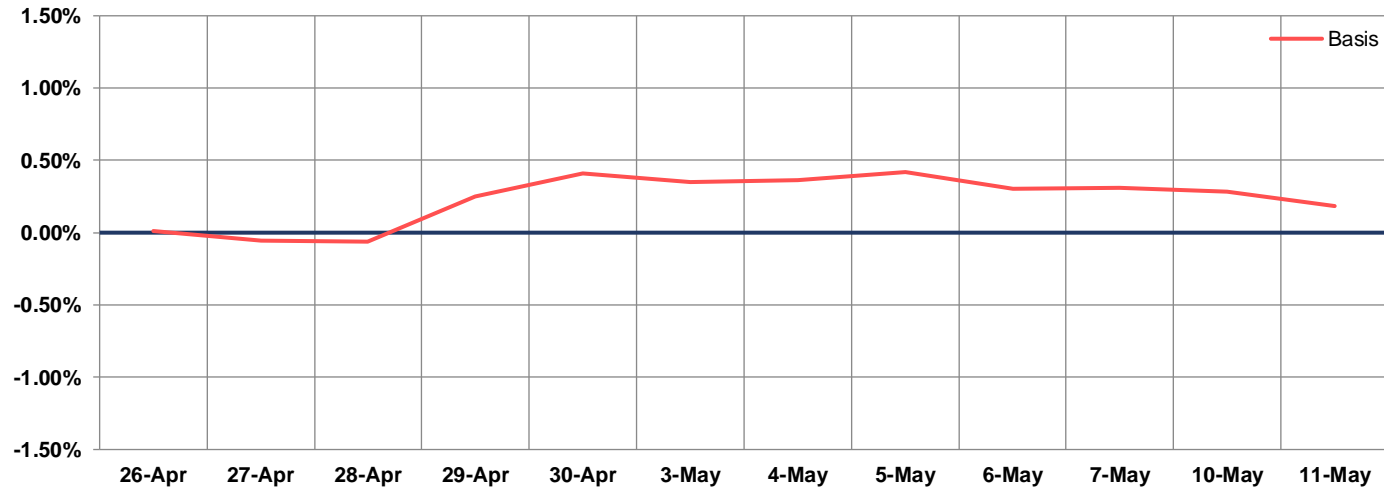
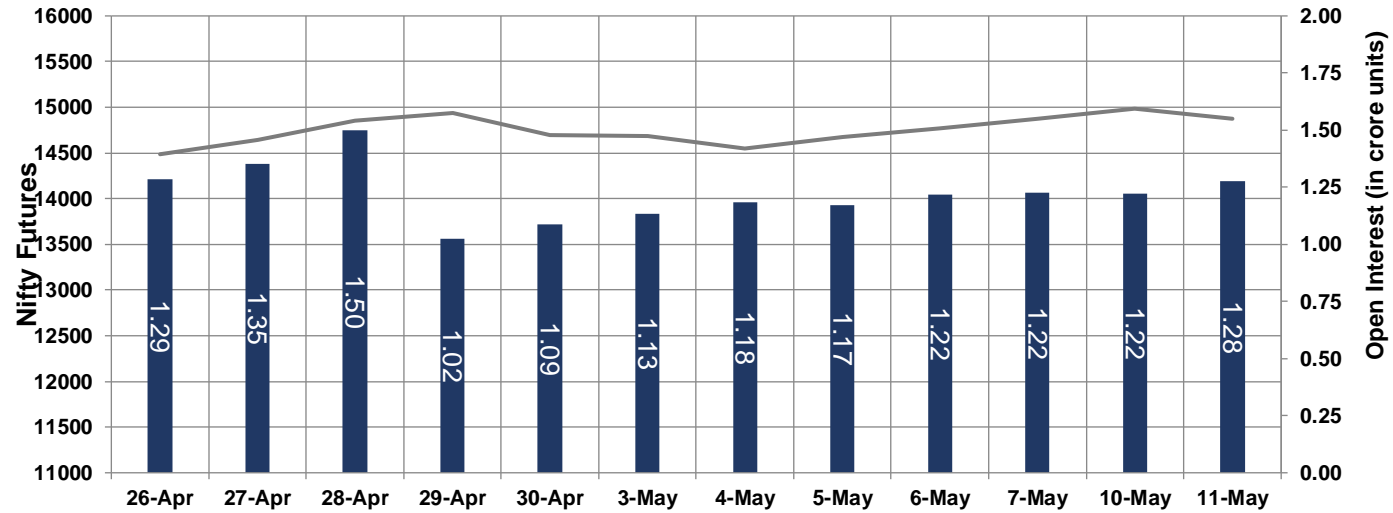
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	14851	14712	14781	14841	14910	14969	Buy	Buy	Buy
SENSEX	49162	48835	48998	49151	49315	49468	Buy	Buy	Buy
NIFTY FUTURES	14875	14712	14793	14866	14948	15021	Buy	Buy	Buy
BANK NIFTY	32872	32337	32605	32879	33147	33422	Neutral	Neutral	Buy
CNX IT	26107	25895	26001	26074	26179	26252	Buy	Buy	Buy
CNX MIDCAP	24972	24351	24661	24838	25148	25325	Buy	Buy	Buy
CNX SMALLCAP	8943	8729	8836	8905	9011	9080	Buy	Buy	Buy
INDIA VIX	19.83	18.82	19.33	20.22	20.73	21.62	Sell	Sell	Neutral

NIFTY TECHNICAL & INDICES LEVEL

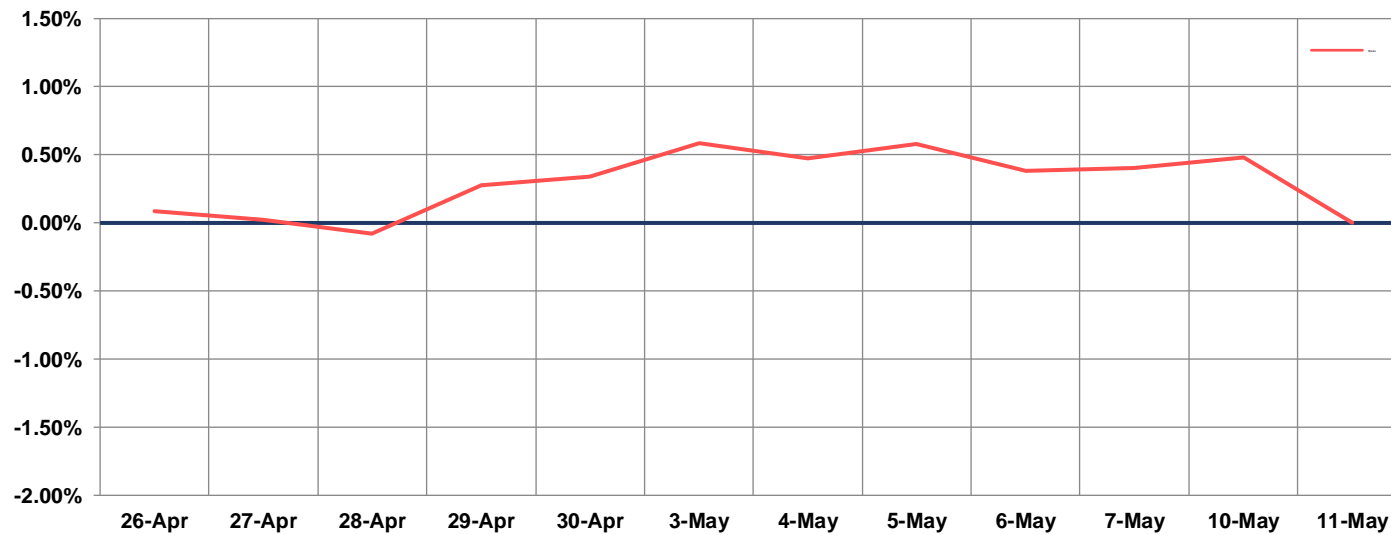
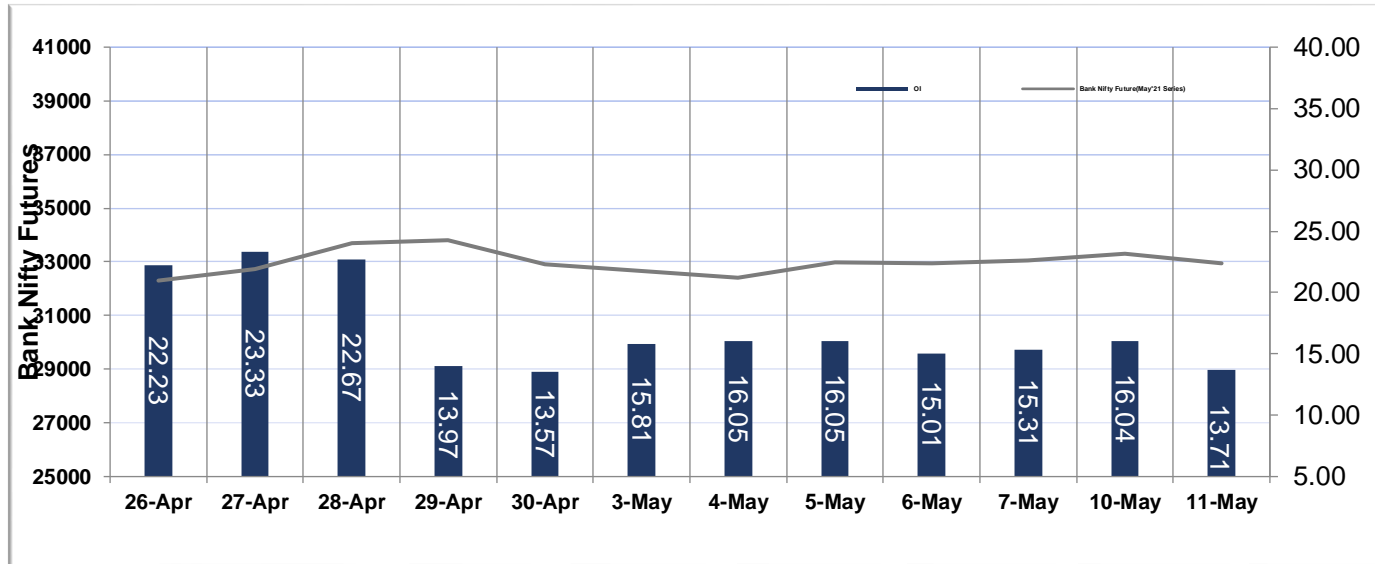


- Nifty Cash prices have settled at **14850.75** down by 0.61 percent from the previous close. On the upper side it has resistance of **14990** and **15040** levels, while lower side it has support of **14760** and **14630** levels. Intraday traders should be cautious and take position accordingly.

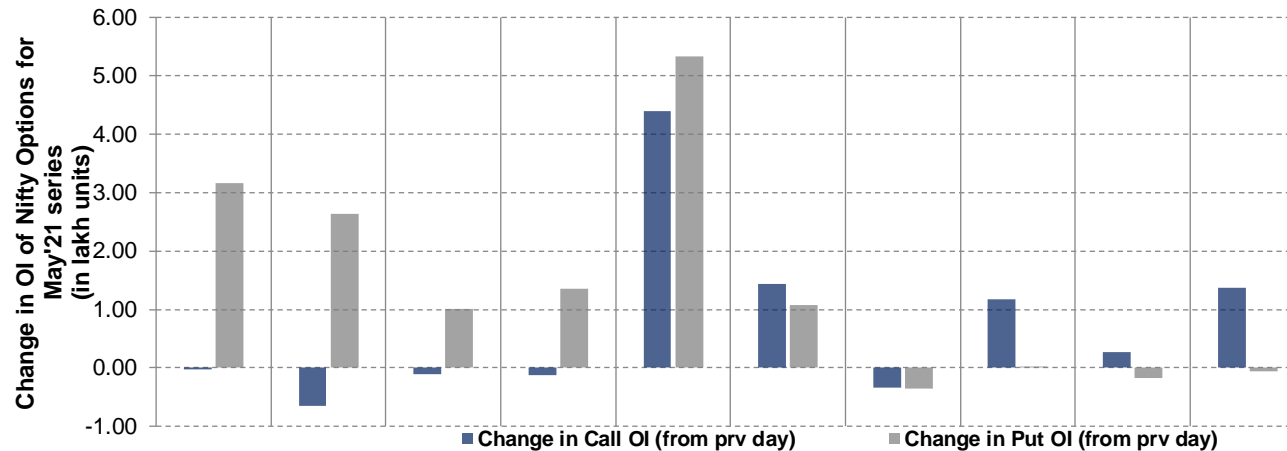
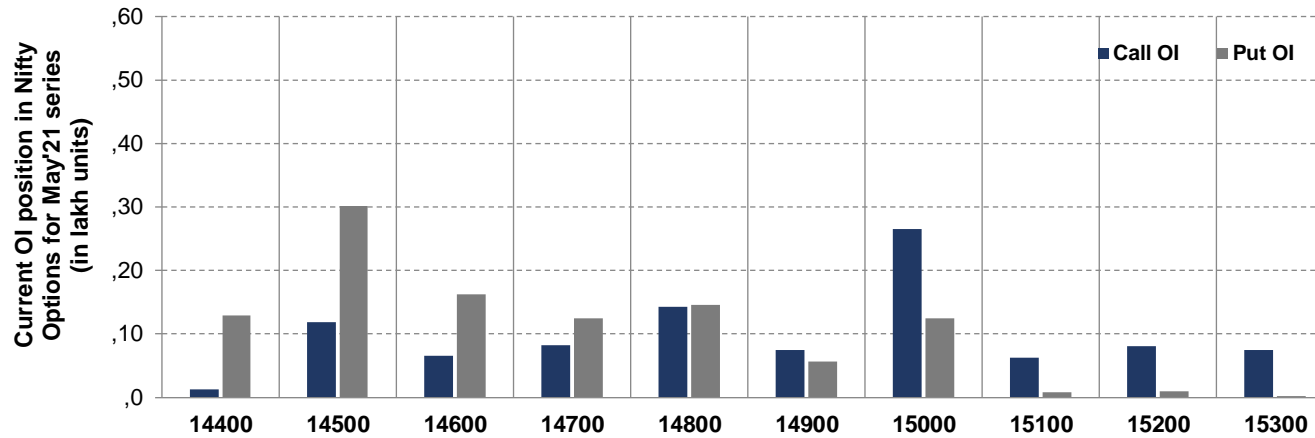
NIFTY FUTURES



BANK NIFTY FUTURES



NIFTY OPTIONS



- Among Nifty calls 15,000 SP from the May month expiry was the most active call with a reduction of 0.03 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 (2.65mn) and that for Puts was at 14,500 SP (3.02mn)

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