

# Morning Mantra

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

ISO 9001 : 2015 Certified



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## MARKET COMMENTARY

Indian equity benchmarks ended on a flat note on Friday. After a cautious start, markets remained volatile for the whole trading session, amid worries over the economic impact of the second wave of COVID-19 and lockdowns and restrictions in various states. The Maharashtra government has extended the lockdown-like restrictions in the state till June 1 to break the chain of COVID-19. Domestic sentiments were negative, amid reports that the ongoing second COVID-19 wave is affecting private equity and venture capital investments in terms of the deal numbers witnessed in April.

Key indices altered between green and red terrain again and again during the trading day. Traders got worried, as Retailers Association of India (RAI) said workers and businesses in the retail industry are in need of urgent support as the restrictions to combat the second wave of the COVID-19 pandemic has hit them hard. With the days of the lockdown continuing to extend in various parts of the country, RAI said it is getting increasingly difficult for retailers to retain employees and to keep their businesses afloat, and there is a need to inject capital into the industry.

However, drop in Covid cases limited the downside in the markets. India reported a dip in fresh Covid cases to below 3.5 lakh mark at 3,43,122. This was lower than Wednesday's figure of 3,62,720 cases. Market participants react to the IIP and CPI numbers. India's factory output climbed 22.4 per cent in March, benefiting from the base effect of the lockdown-marred month a year back as well as a turnaround in the manufacturing sector, while retail inflation slipped to a three-month low of 4.29 per cent in April. Investors are eyeing WPI inflation data for April slated to be declared later in the day.

On the global front, European markets were trading higher helped by the rebound on Wall Street as Federal Reserve officials managed to ease investor jitters over growing inflationary pressures. Asian markets ended mostly higher on Friday, after export prices in South Korea were up 10.6 percent on year in April, the Bank of Korea said on Friday - after rising 5.9 percent in the previous month. Import prices spiked an annual 15.0 percent in April after climbing 9.0 percent a month earlier. Individually, export prices for agricultural and marine products fell 4.2 percent on year and manufactured products jumped 10.7 percent.

## MARKET SUMMARY

| Domestic Indices | Close    | Points  | % Change |
|------------------|----------|---------|----------|
| SENSEX           | 48732.55 | 41.75   | 0.09     |
| NIFTY            | 14677.80 | -18.70  | -0.13    |
| MIDCAP           | 20507.79 | -237.01 | -1.14    |
| SMLCAP           | 22200.54 | -265.74 | -1.18    |
| BSEFMC           | 12990.42 | 254.90  | 2.00     |
| AUTO             | 22031.17 | -455.65 | -2.03    |
| POWER            | 2643.11  | -23.88  | -0.90    |
| REALTY           | 2388.85  | -81.81  | -3.31    |
| BSE IT           | 26131.56 | -212.34 | -0.81    |
| BANEX            | 36599.91 | -299.66 | -0.81    |
| OIL GAS          | 15583.33 | -269.15 | -1.70    |
| METAL            | 18777.06 | -703.92 | -3.61    |
| INDIA VIX        | 20.27    | 0.19    | 0.93     |

## ADVANCE-DECLINE

| Index | Advance | Decline | Unchanged |
|-------|---------|---------|-----------|
| NSE   | 762     | 1216    | 77        |
| BSE   | 1371    | 1724    | 145       |

## MARKET TURNOVER (₹ in Crs)

| Segment  | Current | Previous | Net % |
|----------|---------|----------|-------|
| BSE CASH | 6020    | 6661     | (10)  |
| NSE CASH | 85398   | 85405    | (0)   |
| NSE F&O  | 2540178 | 8006586  | (68)  |

## KEY INDICES RATIOS

| INDEX  | P/E   | P/B  | Dividend Yield |
|--------|-------|------|----------------|
| NIFTY  | 29.79 | 4.20 | 1.00           |
| SENSEX | 31.03 | 3.13 | 0.87           |

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

| FII-DII* | Buy  | Sell | Net    |
|----------|------|------|--------|
| DII      | 5444 | 4831 | 613    |
| FII      | 5856 | 8464 | (2608) |

Note: FII & DII Figures are provisional

## FII DERIVATIVES (₹ in Crs)

| FII           | Buy       | Sell      | Net   |
|---------------|-----------|-----------|-------|
| Index Futures | 4808.18   | 4182.97   | 625   |
| Index Options | 248258.28 | 243614.34 | 4644  |
| Stock Futures | 15428.04  | 16330.09  | (902) |
| Stock Options | 21068.15  | 21409.21  | (341) |

## PUT-CALL RATIO

| Index      | Current | Previous |
|------------|---------|----------|
| NIFTY      | 1.11    | 1.00     |
| BANK NIFTY | 0.71    | 0.74     |

## SECURITIES BAN FOR TRADE IN F&O FOR 17-05-2021

|          |
|----------|
| BHEL     |
| CADILAHC |
| CANBK    |
| PNB      |
| SAIL     |
| SUNTV    |

## 10-YEAR GOVERNMENT SECURITIES YIELD

| Country | Current | Previous | % Chg |
|---------|---------|----------|-------|
| INDIA   | 5.986   | 6.010    | -0.40 |
| USA     | 1.647   | 1.668    | -1.25 |

## DOLLAR INDEX

| Dollar Index | Current | Previous | % Chg |
|--------------|---------|----------|-------|
| DXY          | 90.33   | 90.75    | -0.46 |

## CURRENCY FUTURES

| Expiry             | Close  | Chg Point | % Chg |
|--------------------|--------|-----------|-------|
| 27 May-21 USD-INR  | 73.45  | -0.14     | -0.19 |
| 27 May-21 EUR-INR  | 89.00  | -0.27     | -0.30 |
| 27 May-21 GBP-INR  | 103.42 | -0.62     | -0.59 |
| 27 May-21 JPY- INR | 67.20  | -0.51     | -0.76 |

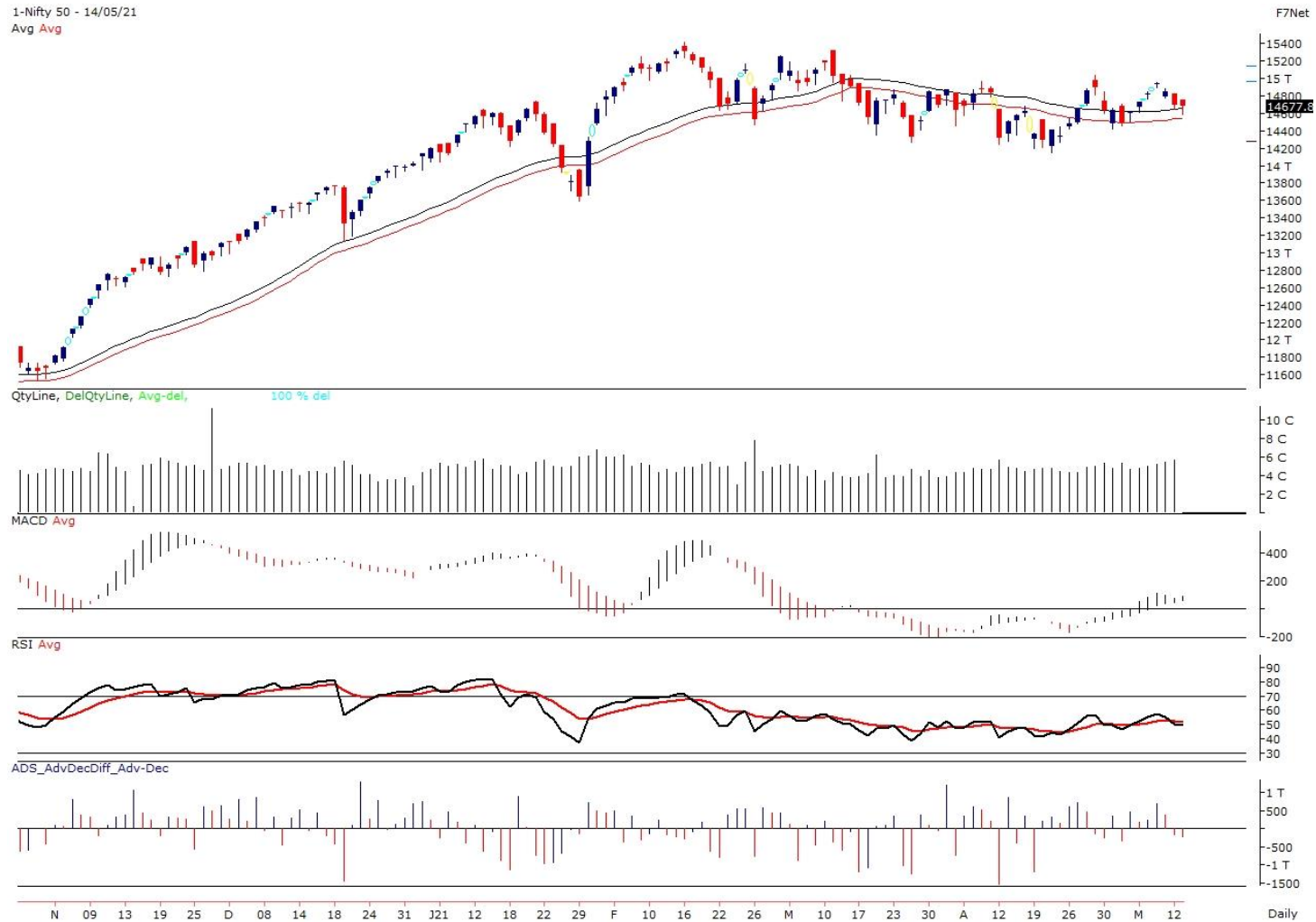
## KEY COMMODITIES TRACKER

| Commodity   | Current | Chg Point | % Chg |
|-------------|---------|-----------|-------|
| Gold        | 1835.72 | 10.68     | 0.59  |
| Silver      | 27.28   | 0.24      | 0.90  |
| Crude-Oil   | 65.05   | 1.23      | 1.93  |
| Brent-Crude | 68.39   | 1.34      | 2.00  |

## INDEX TREND ANALYSIS

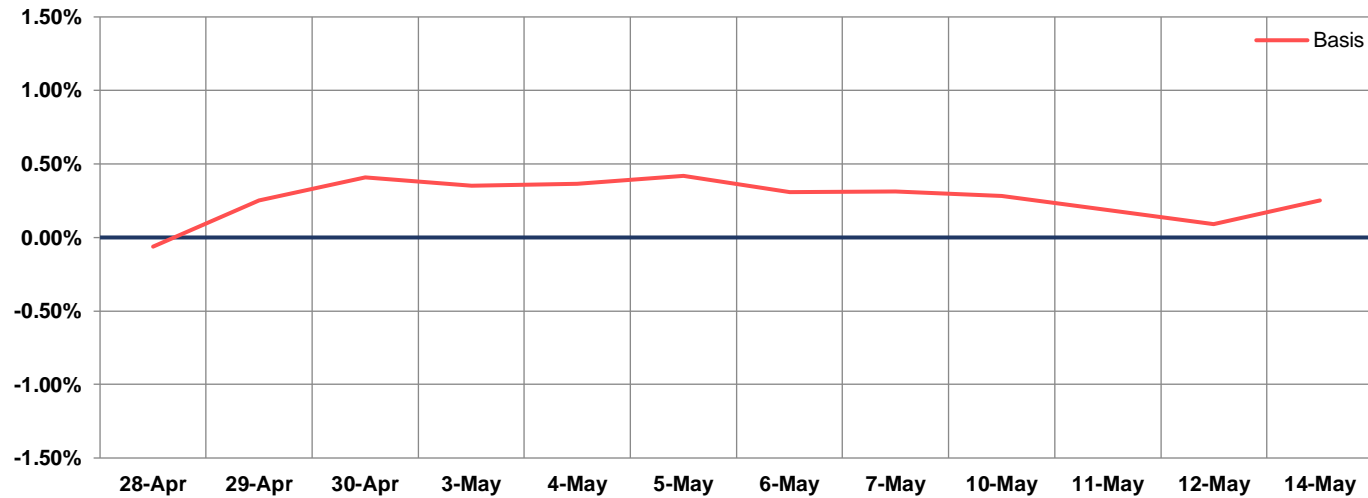
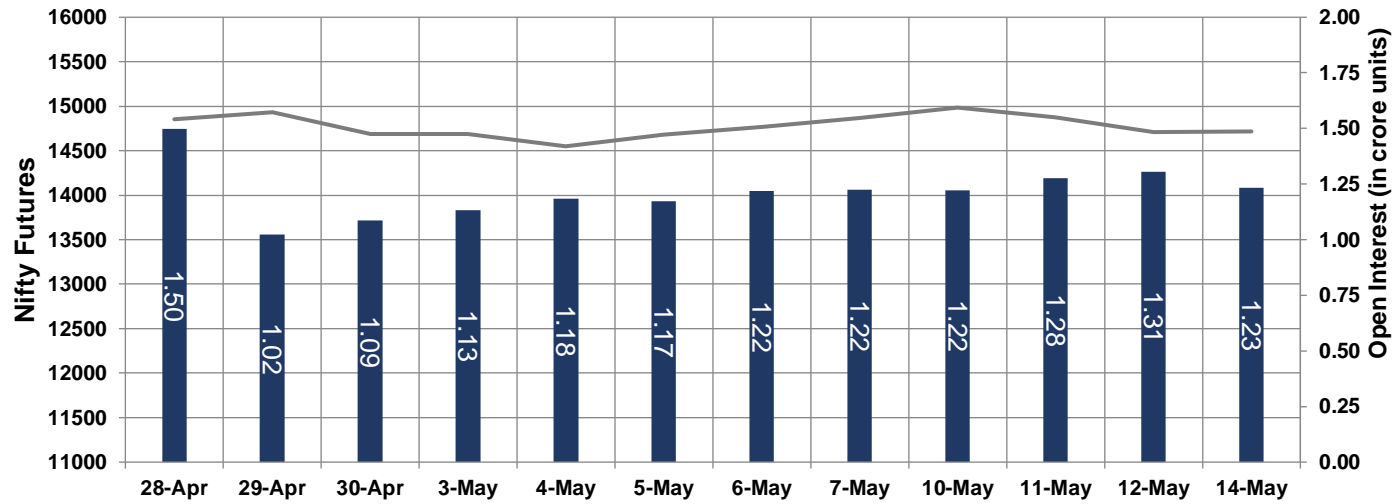
| INDEX         | CLOSE | S2    | S1    | PIVOT | R1    | R2    | DAILY   | WEEKLY  | MONTHLY |
|---------------|-------|-------|-------|-------|-------|-------|---------|---------|---------|
| NIFTY         | 14678 | 14515 | 14597 | 14673 | 14754 | 14831 | Neutral | Neutral | Buy     |
| SENSEX        | 48733 | 48276 | 48504 | 48702 | 48930 | 49127 | Neutral | Neutral | Buy     |
| NIFTY FUTURES | 14718 | 14562 | 14640 | 14698 | 14776 | 14834 | Neutral | Neutral | Buy     |
| BANK NIFTY    | 32170 | 31795 | 31982 | 32303 | 32490 | 32810 | Sell    | Neutral | Buy     |
| CNX IT        | 25588 | 25211 | 25400 | 25650 | 25839 | 26090 | Sell    | Neutral | Buy     |
| CNX MIDCAP    | 24364 | 23814 | 24089 | 24523 | 24797 | 25231 | Neutral | Buy     | Buy     |
| CNX SMALLCAP  | 8759  | 8582  | 8670  | 8821  | 8910  | 9061  | Neutral | Buy     | Buy     |
| INDIA VIX     | 20.27 | 16.96 | 18.61 | 19.88 | 21.54 | 22.81 | Sell    | Sell    | Neutral |

## NIFTY TECHNICAL & INDICES LEVEL

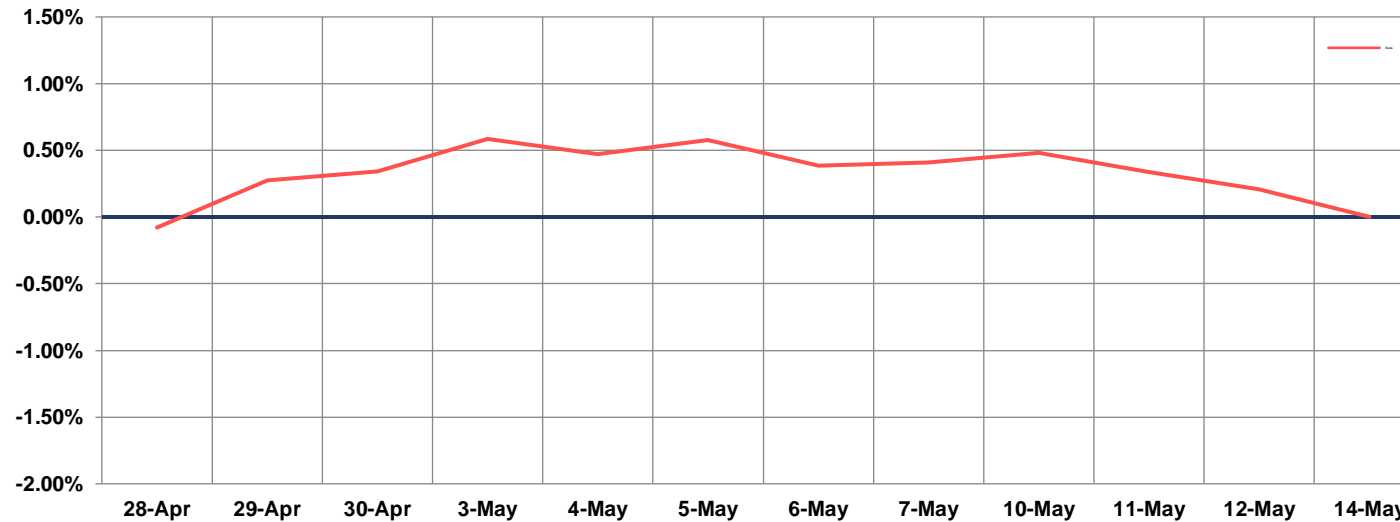
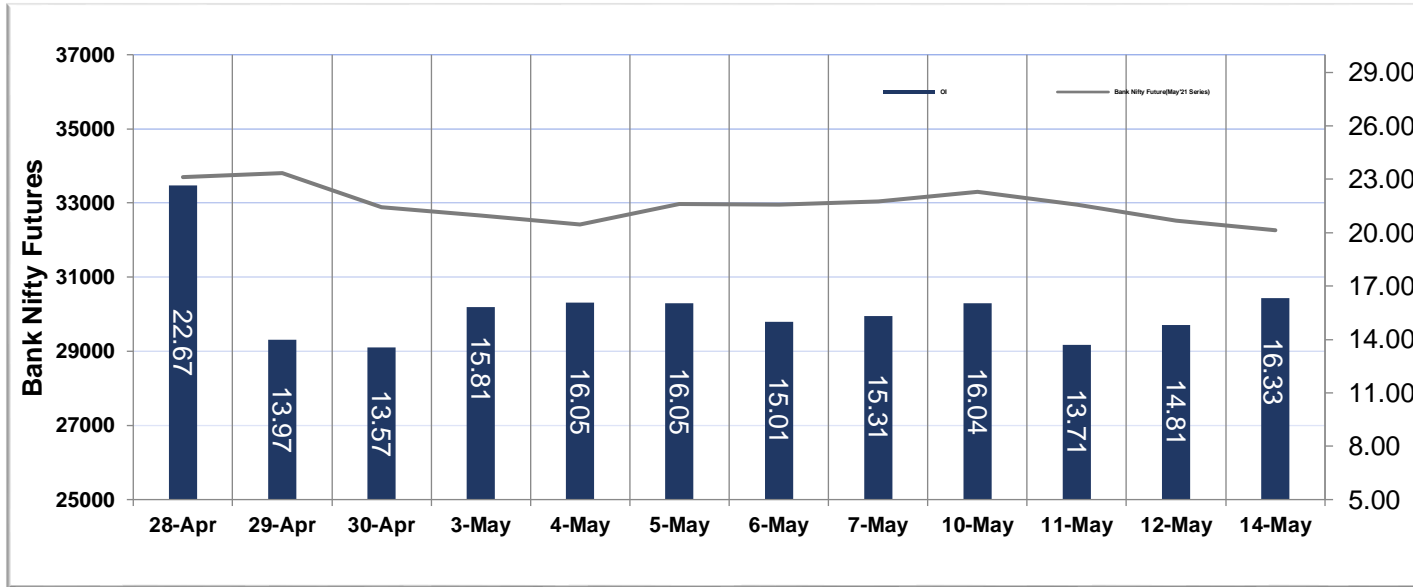


➤ Nifty Cash prices have settled at **14677.80** down by 0.13 percent from the previous close. On the upper side it has resistance of **14750** and **14890** levels, while lower side it has support of **14590** and **14480** levels. Intraday traders should be cautious and take position accordingly.

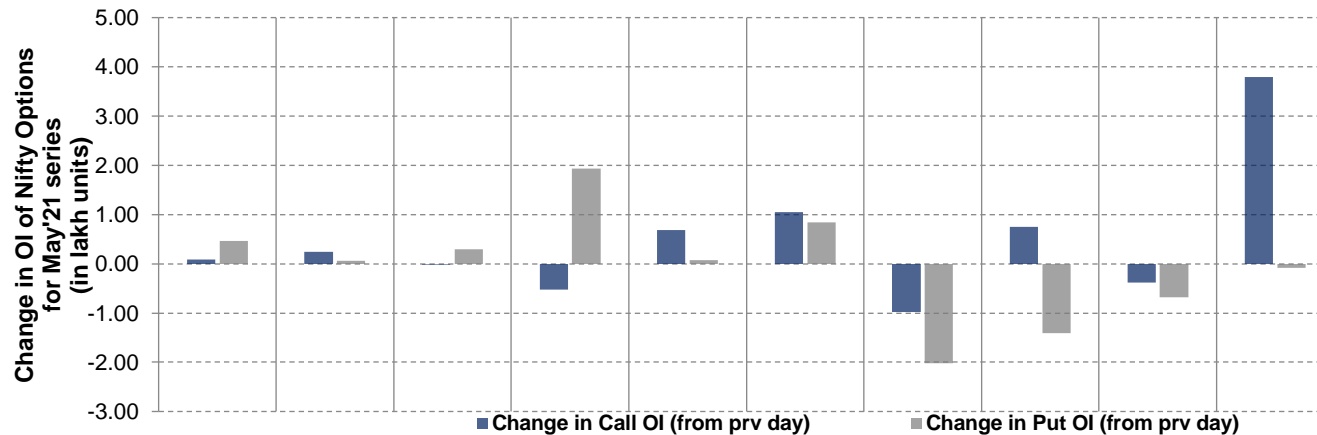
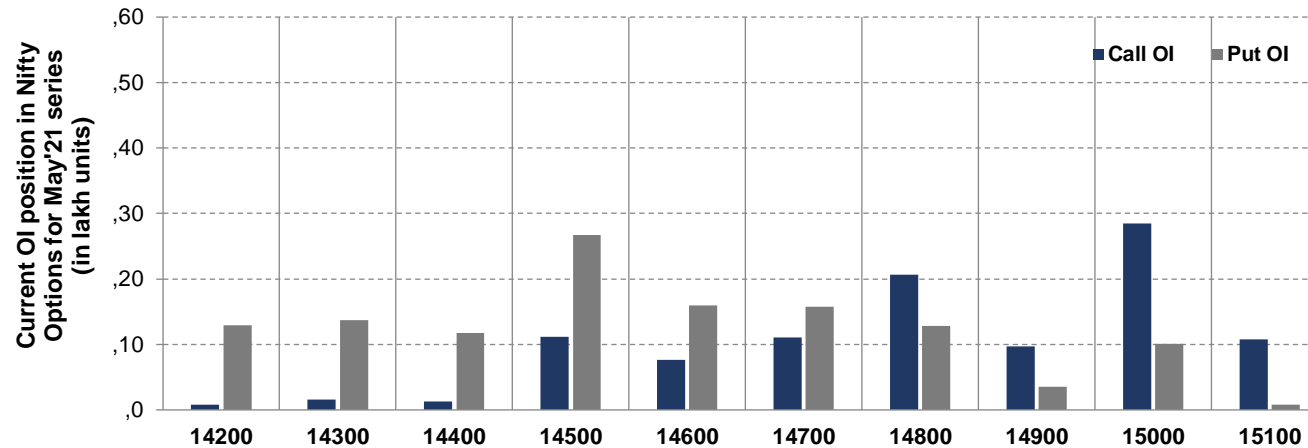
## NIFTY FUTURES



## 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 0.04 million in open interests.
- Among Nifty puts 14,500 SP from the May month expiry was the most active put with an addition of 0.20 million in open interests.
- The maximum OI outstanding for Calls was at 15,000 SP (2.85mn) and that for Puts was at 14,500 SP (2.70mn)



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