

Morning Mantra

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

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MARKET COMMENTARY

Bulls held a tight grip over the Dalal Street on Monday, with both Sensex and Nifty ending near their intraday high points. Markets made an optimistic start of the day, taking support with the government data showing that India's exports in April jumped nearly three-fold to \$30.63 billion from \$10.36 billion in the same month last year. Imports too rose to \$45.72 billion last month as against \$17.12 billion in April 2020. Traders also took note of report that the average of daily cases has fallen for seven days in a row with India reporting 281,860 new cases in the last 24 hours. This is the first time since April 21 that India has recorded new cases below the 300,000 mark.

In the second half of the trading session, key indices extended gains to end on a strong note. Sentiments got a boost with the India Meteorological Department (IMD) stating that the southwest monsoon is likely to arrive over Kerala on May 31, a day earlier than its normal onset date. The normal onset date of the monsoon over Kerala is June 1. Traders remained energized after RBI data showed that country's foreign exchange reserves increased by \$1.444 billion to \$589.465 billion in the week ended May 7, 2021. In the previous week ended April 30, 2021, the reserves had risen by \$3.913 billion to \$588.02 billion.

The street overlooked that Care ratings' latest survey stated that amid a raging second wave of COVID-19 and subsequent restrictions on business activities imposed by several states, economic recovery is beginning to lose steam and the country's GDP growth is likely to be below nine per cent for the current fiscal. Market participants also overlooked report that the wholesale price-based inflation shot up to an all-time high of 10.49 per cent in April, on rising prices of crude oil and manufactured items. Also, a low base of April last year contributed to the spike in inflation in April 2021.

On the global front, European markets were trading lower after staging a sharp recovery late last week, as underwhelming Chinese data and a resurgence of COVID-19 cases in some Asian countries outweighed optimism over the reopening of the British economy. Asian markets ended mixed on Monday, even after Industrial production in China was up 9.8% on year in April, the National Bureau of Statistics said on Monday - in line with expectations following the 14.1% jump in March. The bureau also said that fixed asset investment spiked 19.9% on year, beating forecasts for 19.0% and down from 25.6% in the previous month. Retail sales advanced an annual 17.7%, missing forecasts for 24.9% and down sharply from 34.2% a month earlier.

MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	49580.73	848.18	1.74
NIFTY	14923.15	245.35	1.67
MIDCAP	20842.20	334.41	1.63
SMLCAP	22558.92	358.38	1.61
BSEFMC	13015.45	25.03	0.19
AUTO	22449.62	418.45	1.90
POWER	2692.15	49.05	1.86
REALTY	2426.80	37.95	1.59
BSE IT	26341.69	210.13	0.80
BANKEK	38058.27	1458.36	3.98
OIL GAS	15681.30	97.97	0.63
METAL	19140.10	363.04	1.93
INDIA VIX	19.61	-0.66	-3.24

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	1341	648	94
BSE	2075	1095	189

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	5640	6020	(6)
NSE CASH	76208	85398	(11)
NSE F&O	3306583	2540178	30

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	30.20	4.27	0.98
SENSEX	31.43	3.17	0.86

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	7097	5148	1948
FII	5798	8053	(2256)

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	5102.09	4215.66	886
Index Options	313681.08	318177.46	(4496)
Stock Futures	14874.29	13816.51	1058
Stock Options	19452.95	19333.54	119

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.40	1.11
BANK NIFTY	1.45	0.71

SECURITIES BAN FOR TRADE IN F&O FOR 18-05-2021

BHEL
CADILAHC
CANBK
PNB
SAIL
SUNTV

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	5.972	5.986	-0.23
USA	1.639	1.635	0.22

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	90.26	90.31	-0.05

CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
27 May-21 USD-INR	73.45	0.01	0.02
27 May-21 EUR-INR	89.30	0.30	0.34
27 May-21 GBP-INR	103.58	0.21	0.20
27 May-21 JPY- INR	67.32	0.13	0.20

KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1860.70	19.00	1.04
Silver	27.87	0.45	1.64
Crude-Oil	66.07	0.70	1.07
Brent-Crude	69.29	0.58	0.84

INDEX TREND ANALYSIS

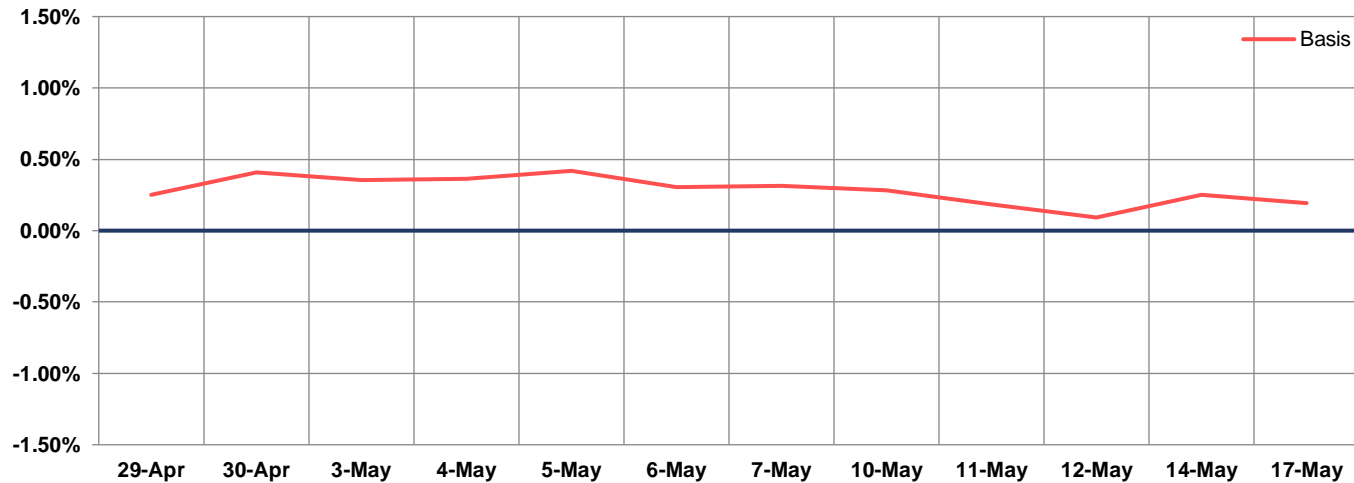
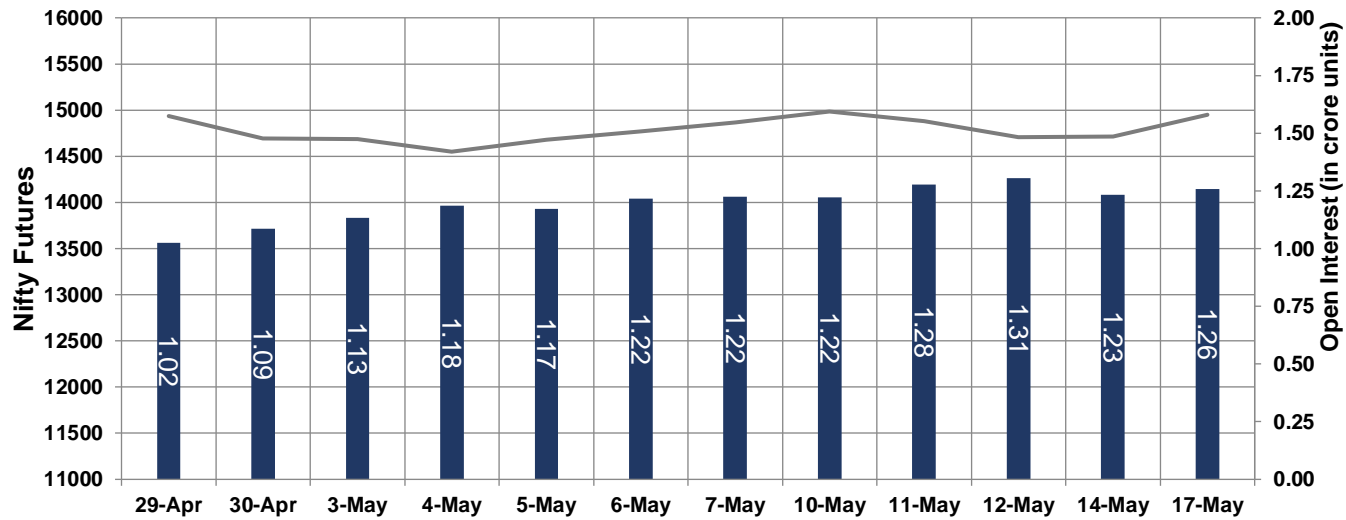
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	14923	14650	14786	14862	14999	15075	Buy	Neutral	Buy
SENSEX	49581	48672	49126	49377	49832	50083	Buy	Neutral	Buy
NIFTY FUTURES	14955	14671	14813	14886	15029	15102	Buy	Neutral	Buy
BANK NIFTY	33459	31907	32683	33095	33871	34283	Neutral	Neutral	Buy
CNX IT	25704	25387	25545	25658	25816	25929	Sell	Neutral	Buy
CNX MIDCAP	24813	24202	24507	24678	24984	25155	Buy	Buy	Buy
CNX SMALLCAP	8859	8747	8803	8838	8894	8928	Buy	Buy	Buy
INDIA VIX	19.61	17.40	18.51	19.46	20.57	21.52	Sell	Sell	Neutral

NIFTY TECHNICAL & INDICES LEVEL

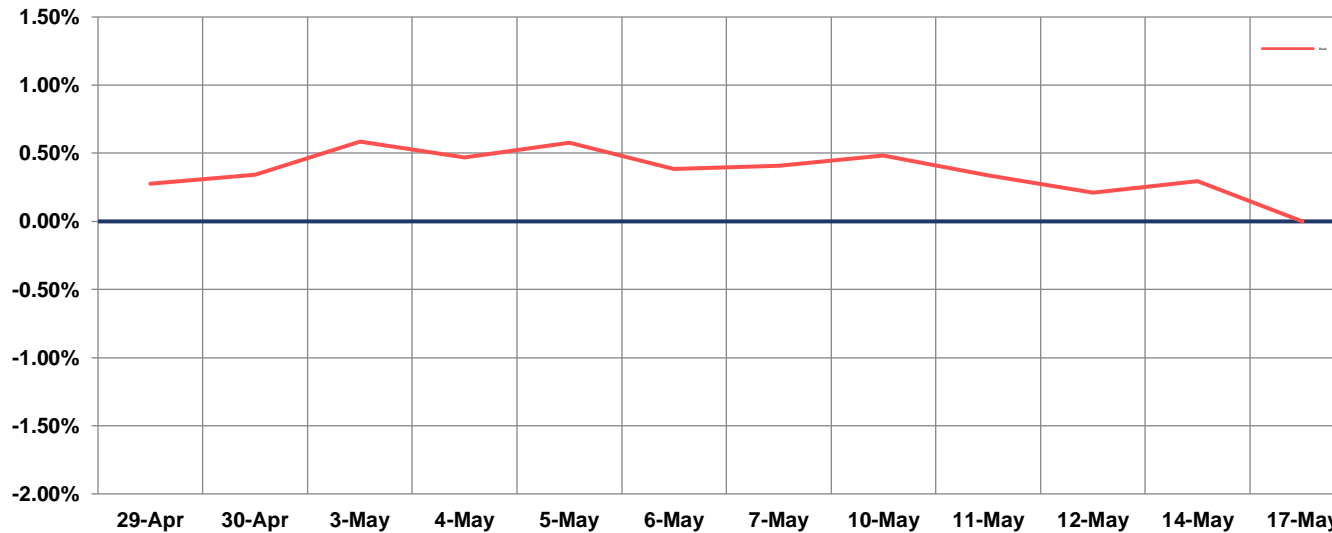
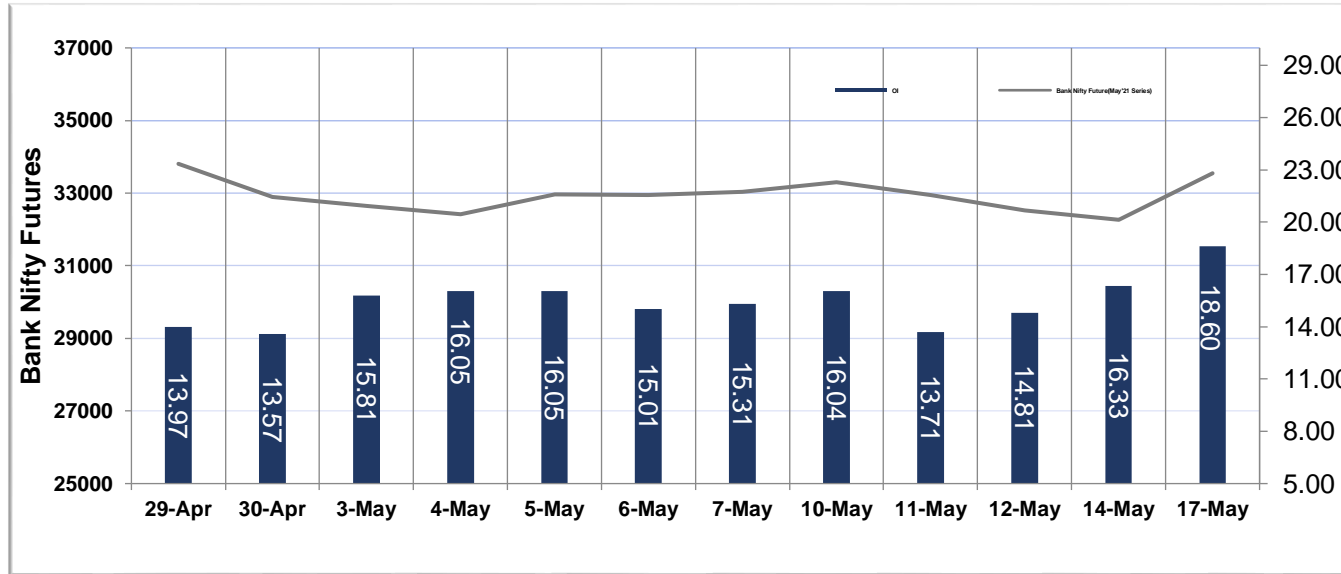


➤ Nifty Cash prices have settled at **14923.15** up by 1.67 percent from the previous close. On the upper side it has resistance of **15040** and **15110** levels, while lower side it has support of **14880** and **14770** levels. Intraday traders should be cautious and take position accordingly.

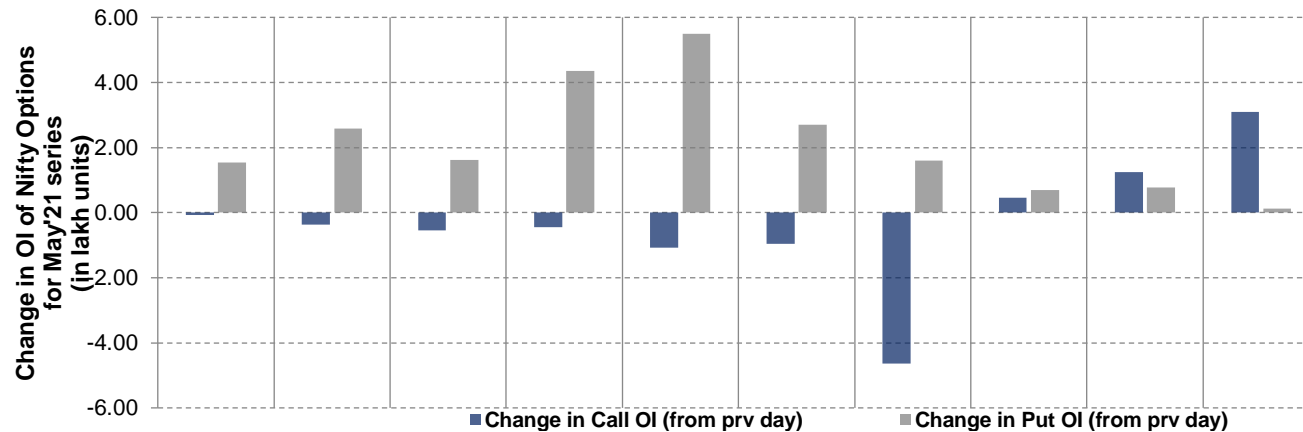
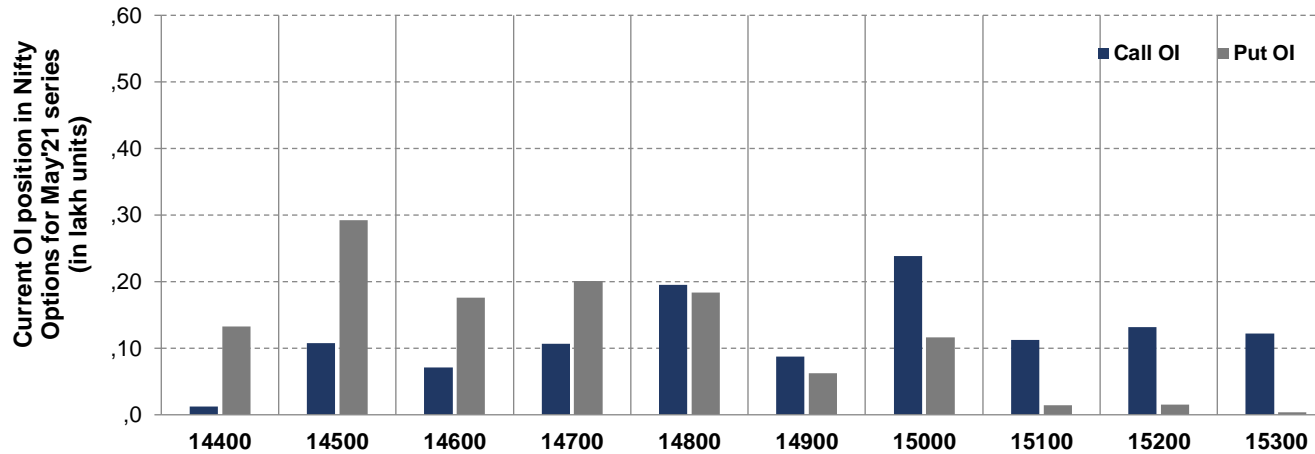
NIFTY FUTURES



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 0.50 million in open interests.
- Among Nifty puts 14,500 SP from the May month expiry was the most active put with an addition of 0.26 million in open interests.
- The maximum OI outstanding for Calls was at 15,000 SP (2.40mn) and that for Puts was at 14,500 SP (2.92mn)

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