

# Morning Mantra

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

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## MARKET COMMENTARY

Firm trade continued over the Dalal Street on Tuesday's trading session, with both Sensex and Nifty ending on a strong note, as bulls held their tight grip. After a positive start, markets remained higher for the whole trading session, as India recorded daily cases below 3 lakh for the second straight day. The fresh case count in the last 24 hours stood at 2.63 lakh versus 2.81 lakh. Some support also came with the RBI data showing that India Inc's foreign investment in the first month of this current fiscal jumped by more than two-times year-on-year to \$2.51 billion.

Indices maintained strong gains in the second half of the trading session, as the Reserve Bank of India's (RBI) Monetary Policy Committee (MPC) member Ashima Goyal is expecting India's economy to do well once vaccination reaches a critical mass as pent up demand, global recovery and easy financial conditions will boost activities. Besides, markets regulator Sebi proposed an elaborate framework for setting up a gold exchange wherein the yellow metal will be traded in the form of electronic gold receipts and will help in having a transparent domestic spot price discovery mechanism.

Traders took a note of an RBI article stating that the double-digit growth registered by non-banking financial companies (NBFCs) during the second and third quarters of 2020-21 amid the disruptions caused by the COVID-19 pandemic reflects the 'resilience' of these entities. Domestic sentiments were positive even after Moody's Investors Service said if the second wave of the pandemic does not decline to more manageable levels and results in a prolonged and wider lockdown, it will have a more severe effect on companies' earnings recovery.

On the global front, European markets were trading higher as global markets look to break out from the gloomy sentiment seen at the start of the trading week. Asian markets settled higher on Tuesday, after Japan's machine tool orders rose for a fifth straight month in April and the pace of growth accelerated sharply. The figures from the Japan Machine Tool Builders' Association showed that machine tool orders grew 120.8 percent year-on-year following a 65.1 percent rise in March. Domestic demand surged 170.3 percent and foreign orders grew 251.3 percent. Compared to the previous month, orders decreased 3.1 percent in April after a 21.1 percent increase in February.

## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	50193.33	612.60	1.24
NIFTY	15108.10	184.95	1.24
MIDCAP	21232.21	390.01	1.87
SMLCAP	22847.90	288.98	1.28
BSEFMC	12967.13	-48.32	-0.37
AUTO	23166.35	716.73	3.19
POWER	2751.52	59.37	2.21
REALTY	2448.57	21.77	0.90
BSE IT	26571.84	230.15	0.87
BANKEX	38528.89	470.62	1.24
OIL GAS	15911.77	230.47	1.47
METAL	19435.71	295.61	1.54
INDIA VIX	19.24	-0.37	-1.89

## ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	1195	757	78
BSE	1901	1191	162

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	5019	5640	(11)
NSE CASH	80424	76208	6
NSE F&O	3649247	3306583	10

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	30.53	4.33	0.97
SENSEX	31.90	3.21	0.85

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

FII-DII*	Buy	Sell	Net
DII	6301	5852	450
FII	8433	7815	618

Note: FII & DII Figures are provisional

## FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	6192.64	3116.62	3076
Index Options	330513.51	324552.12	5961
Stock Futures	14384.96	15341.69	(957)
Stock Options	19777.26	19603.98	173

## PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.40	1.40
BANK NIFTY	1.17	1.45

## SECURITIES BAN FOR TRADE IN F&O FOR 19-05-2021

BHEL
CADILAHC
NATIONALUM
PNB
SAIL
SUNTV

## 10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	5.978	5.972	0.10
USA	1.642	1.640	0.12

## DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	89.86	90.16	-0.34

## CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
27 May-21 USD-INR	73.18	-0.26	-0.35
27 May-21 EUR-INR	89.34	0.01	0.01
27 May-21 GBP-INR	103.80	0.24	0.23
27 May-21 JPY- INR	67.15	-0.16	-0.24

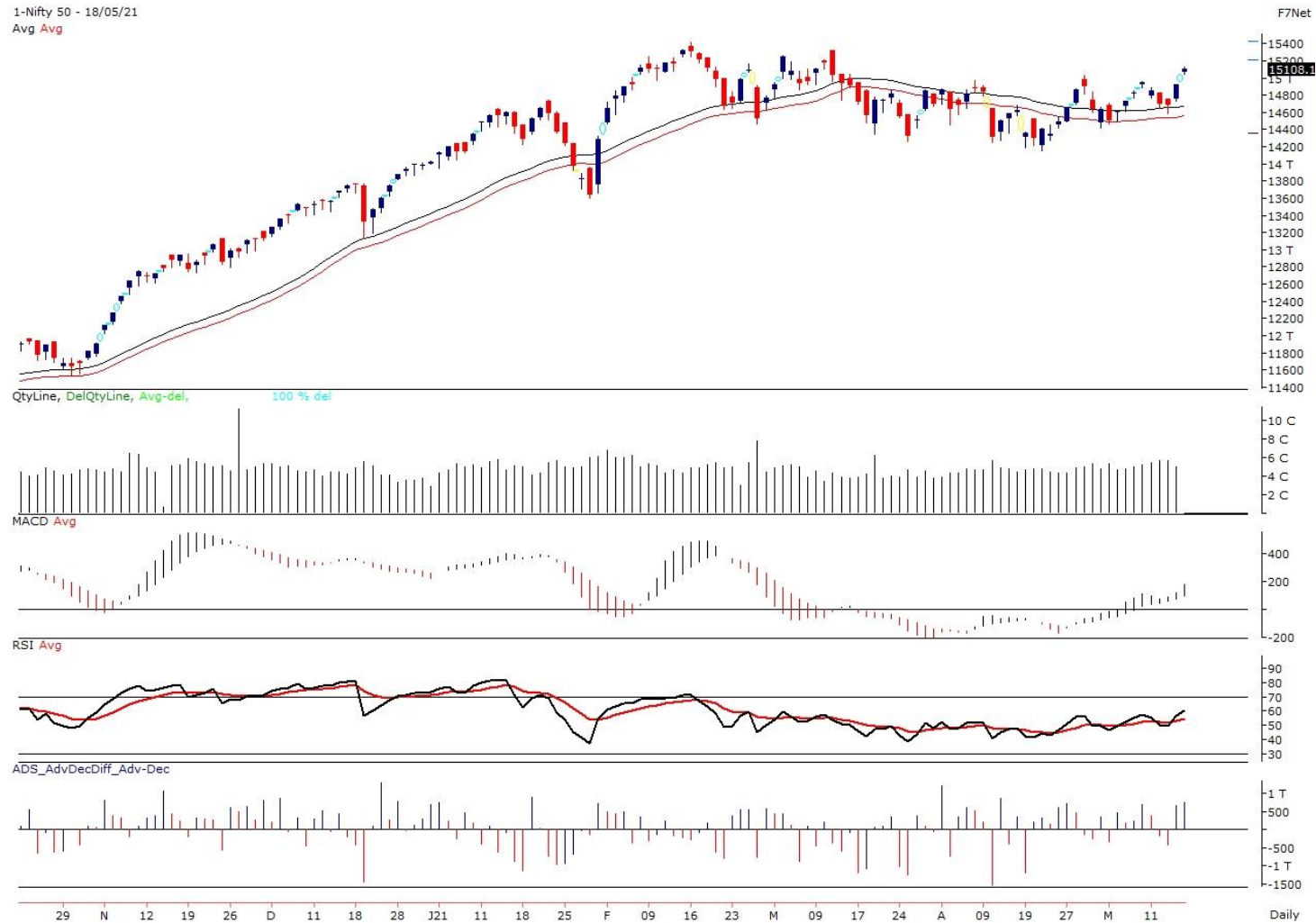
## KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1864.00	-4.86	-0.27
Silver	28.11	-0.13	-0.49
Crude-Oil	65.77	-0.50	-0.75
Brent-Crude	69.16	-0.30	-0.43

## INDEX TREND ANALYSIS

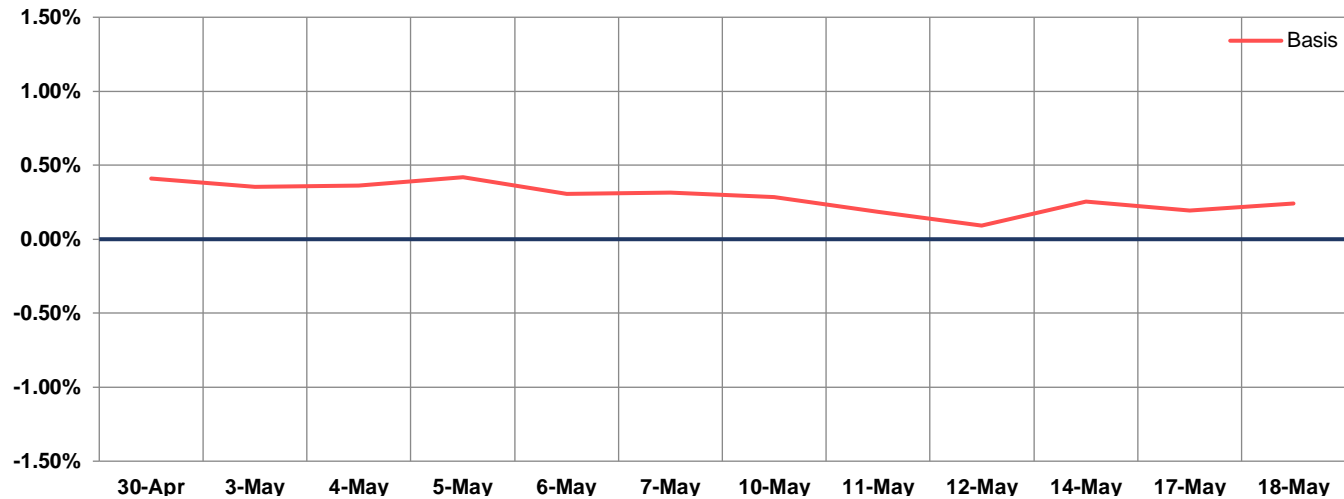
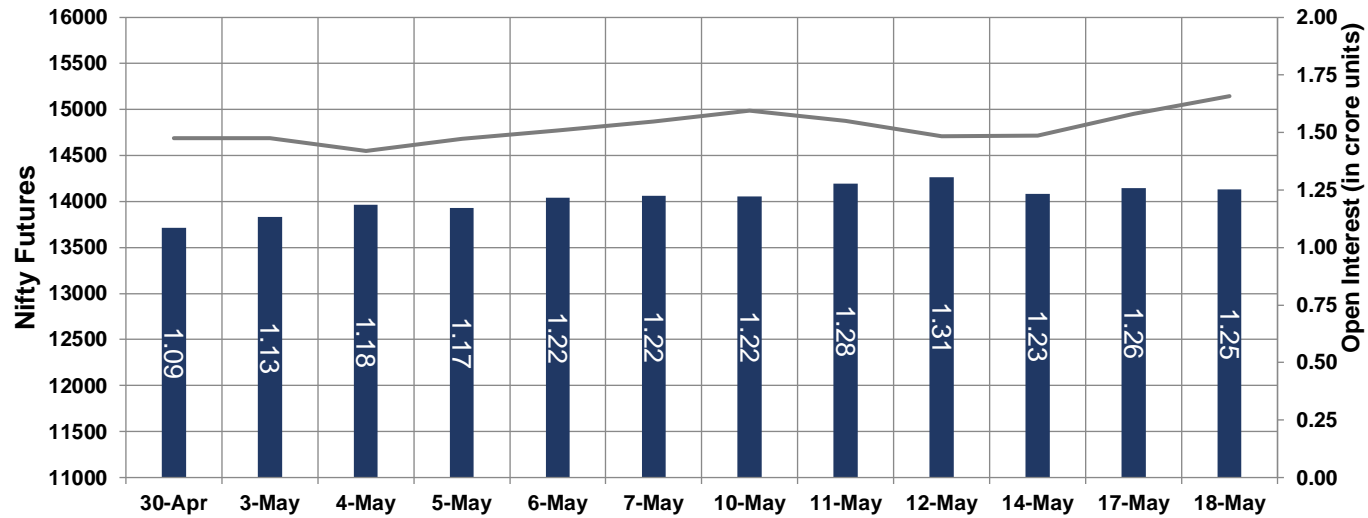
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	15108	15003	15055	15096	15149	15190	Buy	Neutral	Buy
SENSEX	50193	49801	49997	50155	50351	50509	Buy	Neutral	Buy
NIFTY FUTURES	15151	15030	15090	15133	15193	15236	Buy	Neutral	Buy
BANK NIFTY	33922	33520	33721	33932	34133	34344	Neutral	Neutral	Buy
CNX IT	25958	25711	25835	25964	26088	26218	Sell	Neutral	Buy
CNX MIDCAP	25267	24942	25104	25213	25375	25484	Buy	Buy	Buy
CNX SMALLCAP	9000	8910	8955	8994	9039	9078	Buy	Buy	Buy
INDIA VIX	19.24	17.74	18.49	19.05	19.80	20.36	Sell	Sell	Neutral

## NIFTY TECHNICAL & INDICES LEVEL

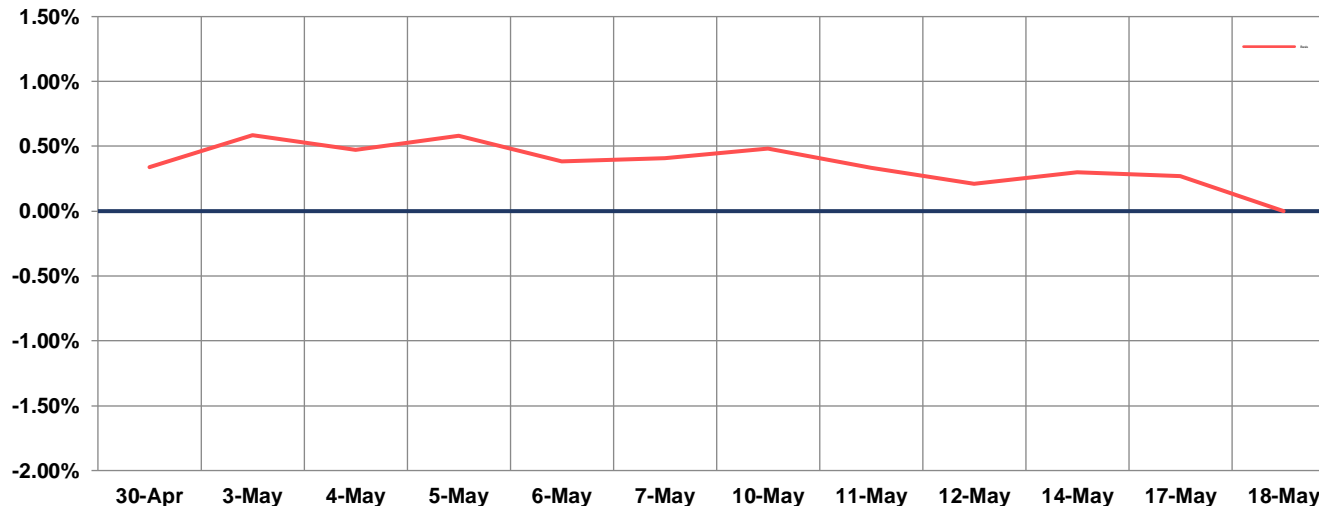
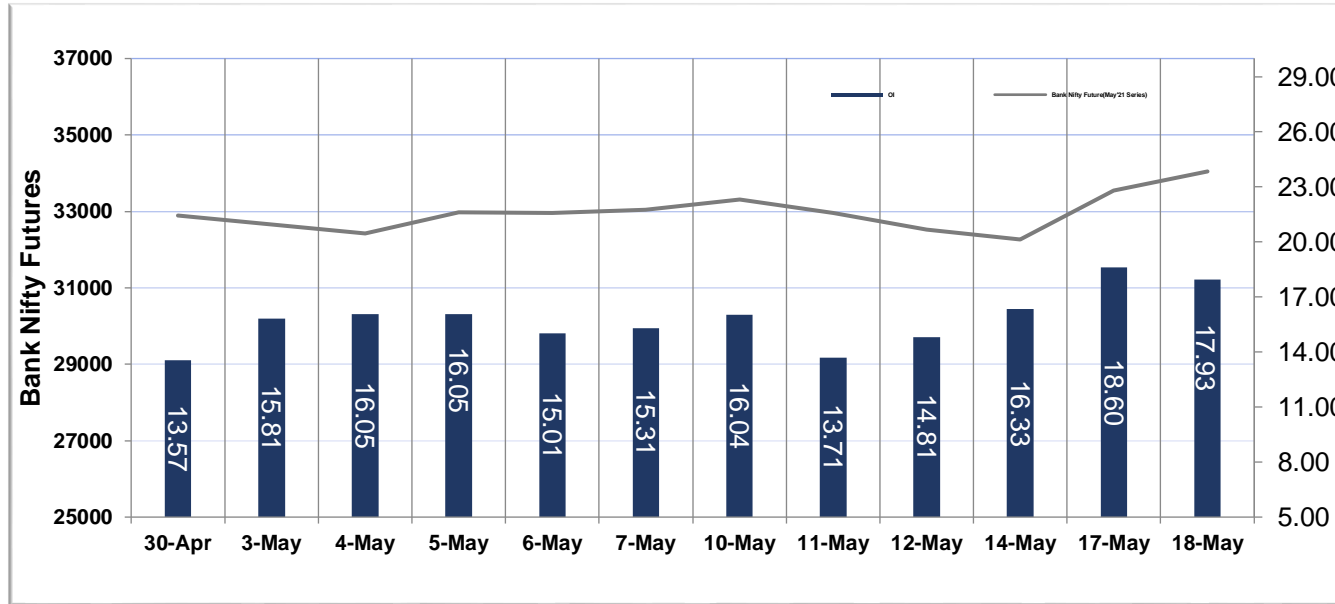


- Nifty Cash prices have settled at **15108.10** up by 1.24 percent from the previous close. On the upper side it has resistance of **15190** and **15235** levels, while lower side it has support of **15040** and **14930** levels. Intraday traders should be cautious and take position accordingly.

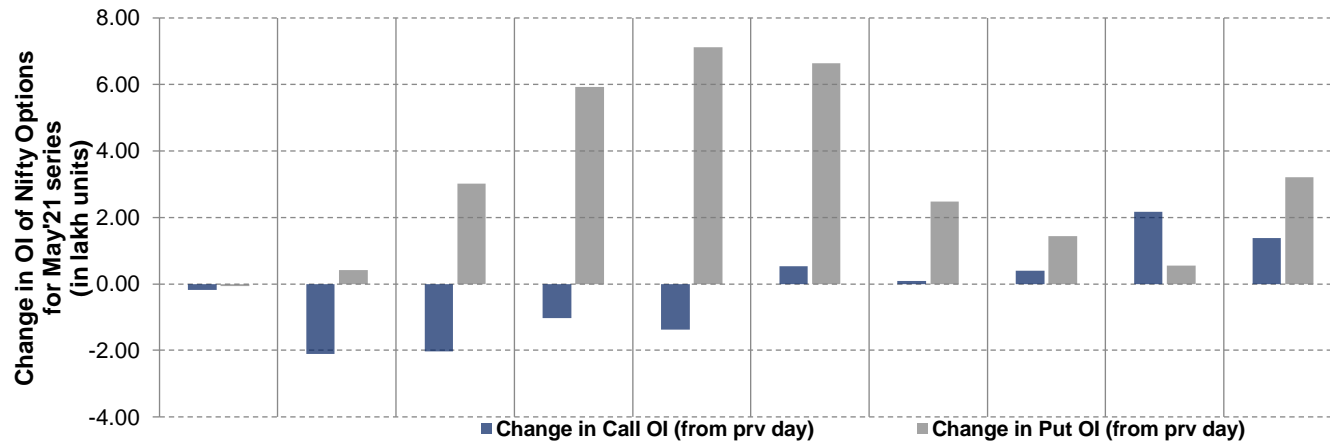
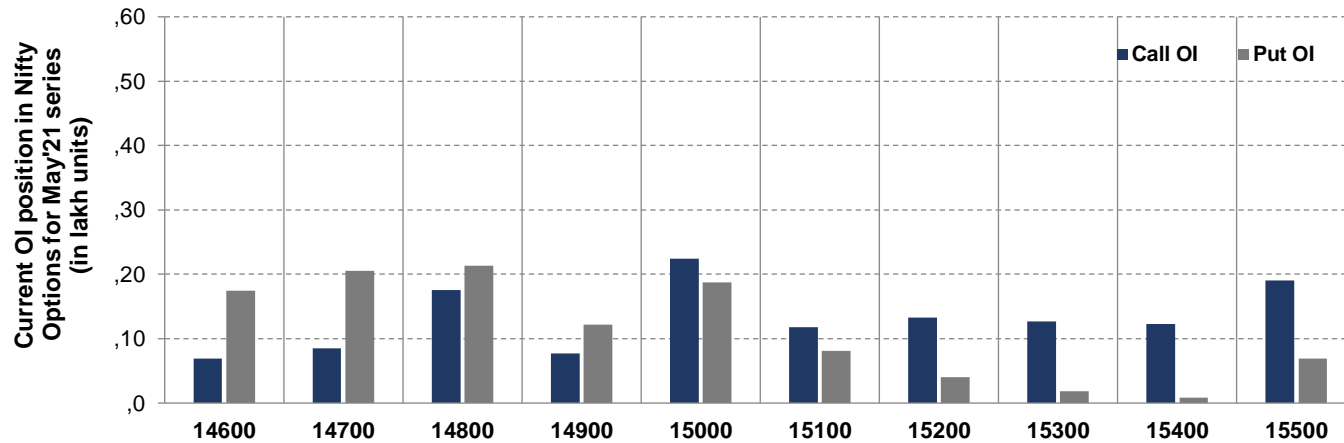
## NIFTY FUTURES



## 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 0.14 million in open interests.
- Among Nifty puts 14,800 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 (2.25mn) and that for Puts was at 14,800 SP (2.13mn)



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