

# Morning Mantra

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

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## MARKET COMMENTARY

Indian equity benchmarks ended volatile session in green on Monday. After a positive start, key indices remained higher for the most part of the trading session, amid drop in Covid-19 cases in the country. India reported Covid-19 cases below the 250,000-mark for the second consecutive. The fresh caseload stood at 2.4 lakh. Amid a drop in cases, a few states have hinted at the possibility of easing lockdown from next month onwards. Some support came in with a private report stating that the RBI surprised the Centre with a record Rs 99,122 crore in surplus transfer for FY21 and this will help the government tide over the revenue losses from lockdowns and extend more support to the pandemic hit industries and to the poor people.

However, volatility witnessed over the Dalal Street during the trading day, as the uneven rollout for the vaccines against COVID-19 remains a factor for markets. The pace of vaccination although is worrying amid shortages of jabs even as a third vaccine -- Sputnik V -- has been added to the inoculation list. Amid a crunch, a few states have suspended vaccination drive for citizens aged 18-45. Also, overseas investors withdrew Rs 4,444 crore from Indian markets in May so far amid concerns over the second wave of the coronavirus pandemic and its possible impact on the Indian economy.

Finally, markets managed to close in green terrain, as traders got relief, after industry body Assocham has demanded from the government a 'concentrated and right kind' of relief package for MSME sector, which was most affected by covid-19 pandemic. Besides, the Central government has invited research and development (RandD) proposals from scientists for the invention of oxygen concentrators in order to curb the COVID-19 pandemic. This initiative will soon catalyse R and D on critical components and innovations concerning Make-in-India oxygen concentrators to meet the emerging healthcare requirements to combat the COVID-19, the government said.

On the global front, European markets were trading higher, as the market focus continued to be on the volatility in the cryptocurrency space. Asian markets ended mostly higher on Monday, even after Hong Kong's consumer prices increased in April. The data from the Census and Statistics Department showed that the composite consumer price index rose 0.7 percent year-on-year in April, following a 0.5 percent increase in March. Excluding the effects of all government one-off relief measures, the composite consumer price index increased 0.3 percent yearly in April, after a 0.2 percent rise in the previous month.

## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	50651.90	111.42	0.22
NIFTY	15197.70	22.40	0.15
MIDCAP	21669.64	183.89	0.86
SMLCAP	23291.87	161.47	0.70
BSEFMC	12906.39	-35.87	-0.28
AUTO	23182.28	15.68	0.07
POWER	2878.67	53.52	1.89
REALTY	2588.28	37.59	1.47
BSE IT	26717.28	-6.89	-0.03
BANKEX	39626.57	340.99	0.87
OIL GAS	16074.44	271.84	1.72
METAL	18530.73	-111.03	-0.60
INDIA VIX	19.13	0.05	0.26

## ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	1199	795	85
BSE	1925	1290	171

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	5503	5338	3
NSE CASH	78227	76164	3
NSE F&O	3528909	2837985	24

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	29.52	4.35	0.97
SENSEX	31.51	3.23	0.87

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

FII-DII*	Buy	Sell	Net
DII	5329	6037	(708)
FII	7831	7245	585

Note: FII & DII Figures are provisional

## FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	5194.92	5565.03	(370)
Index Options	356911.03	357585.17	(674)
Stock Futures	42160.87	43951.38	(1791)
Stock Options	23889.27	23667.86	221

## PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.30	1.40
BANK NIFTY	0.91	1.05

## SECURITIES BAN FOR TRADE IN F&O FOR 25-05-2021

BHEL
CANBK
PNB

## 10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	5.972	5.977	-0.08
USA	1.617	1.632	-0.95

## DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	89.79	90.03	-0.24

## CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
27 May-21 USD-INR	72.96	0.09	0.13
27 May-21 EUR-INR	89.04	-0.03	-0.03
27 May-21 GBP-INR	103.09	-0.48	-0.46
27 May-21 JPY- INR	67.000	-0.06	-0.09

## KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1883.15	2.60	0.14
Silver	27.83	0.32	1.16
Crude-Oil	65.14	1.56	2.45
Brent-Crude	67.93	1.49	2.24

## INDEX TREND ANALYSIS

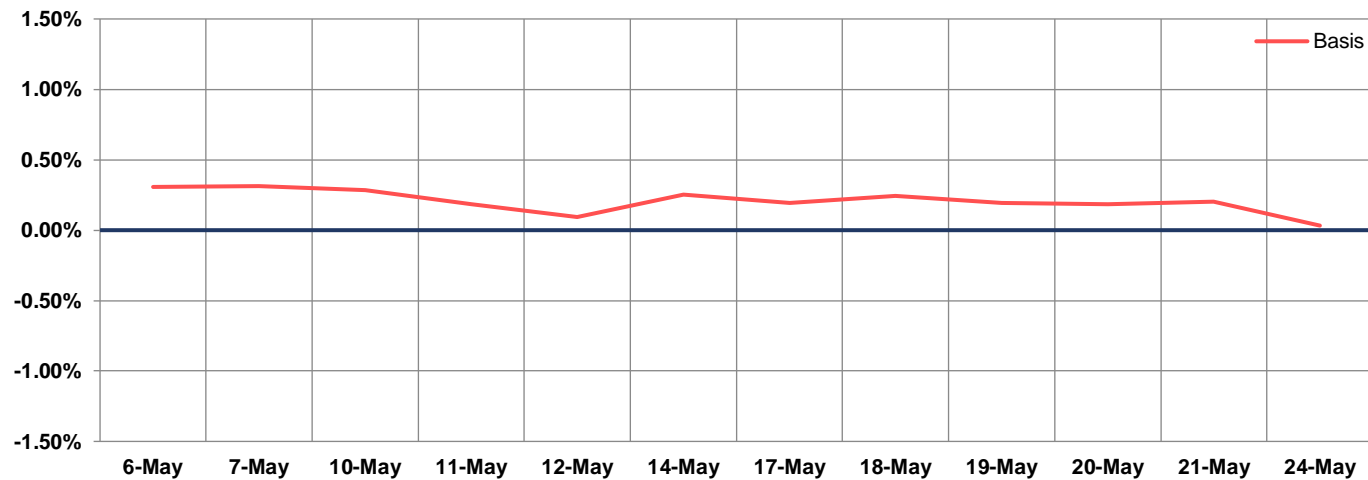
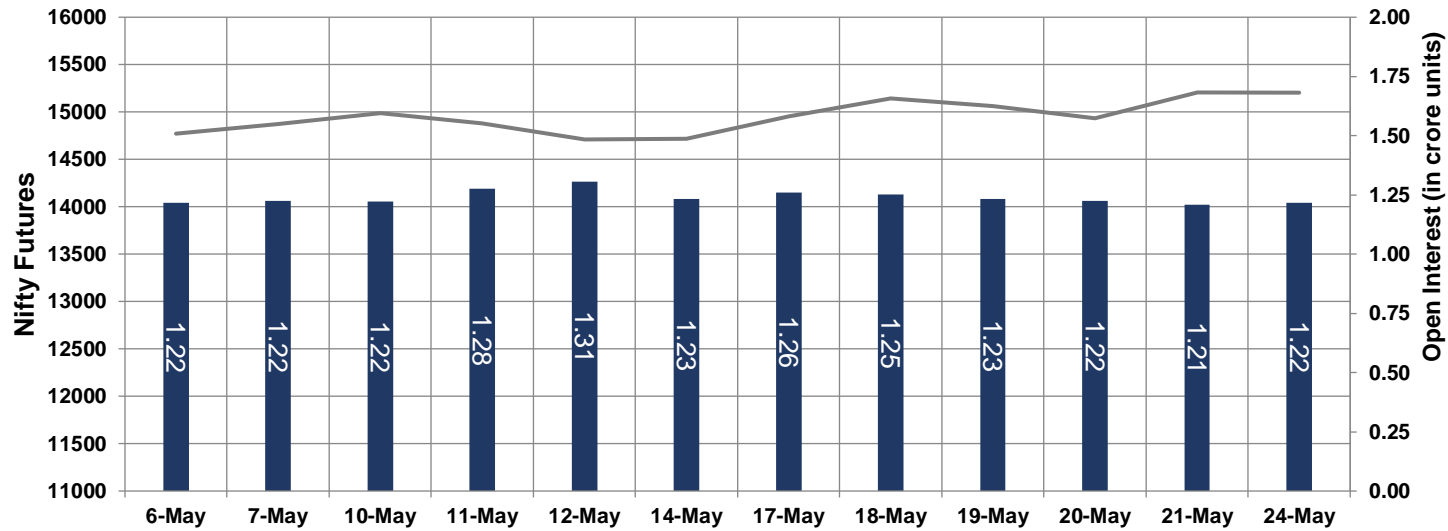
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	15198	15089	15143	15200	15254	15311	Buy	Buy	Buy
SENSEX	50652	50267	50459	50658	50851	51050	Buy	Buy	Buy
NIFTY FUTURES	15190	15091	15140	15200	15249	15309	Buy	Buy	Buy
BANK NIFTY	34944	34208	34576	34896	35264	35584	Buy	Buy	Buy
CNX IT	26144	25976	26060	26179	26263	26383	Buy	Buy	Buy
CNX MIDCAP	25584	25283	25434	25545	25695	25806	Buy	Buy	Buy
CNX SMALLCAP	9179	9083	9131	9166	9214	9248	Buy	Buy	Buy
INDIA VIX	19.13	18.08	18.60	19.25	19.77	20.42	Sell	Sell	Neutral

## NIFTY TECHNICAL & INDICES LEVEL

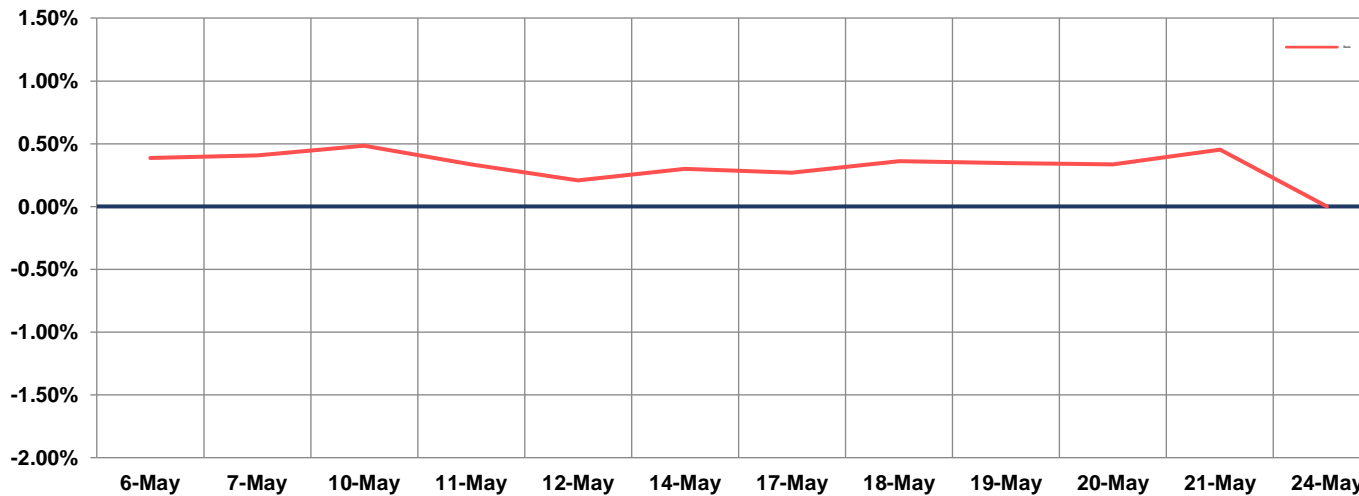
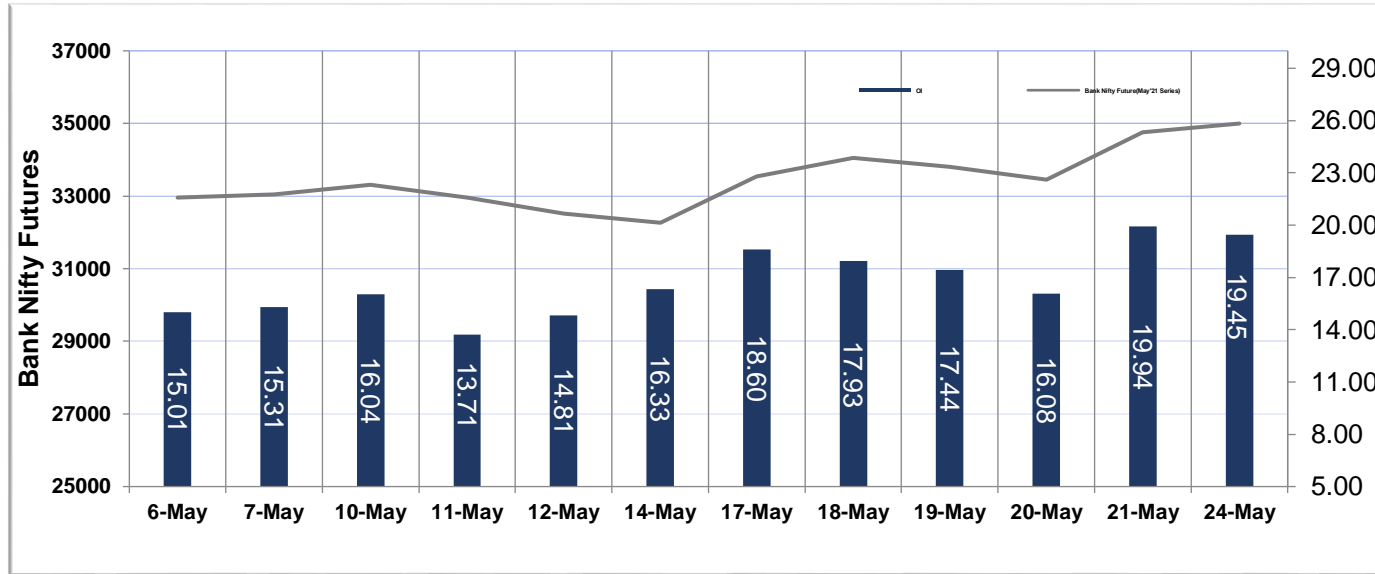


- Nifty Cash prices have settled at **15197.70** up by 0.15 percent from the previous close. On the upper side it has resistance of **15260** and **15380** levels, while lower side it has support of **15040** and **14990** levels. Intraday traders should be cautious and take position accordingly.

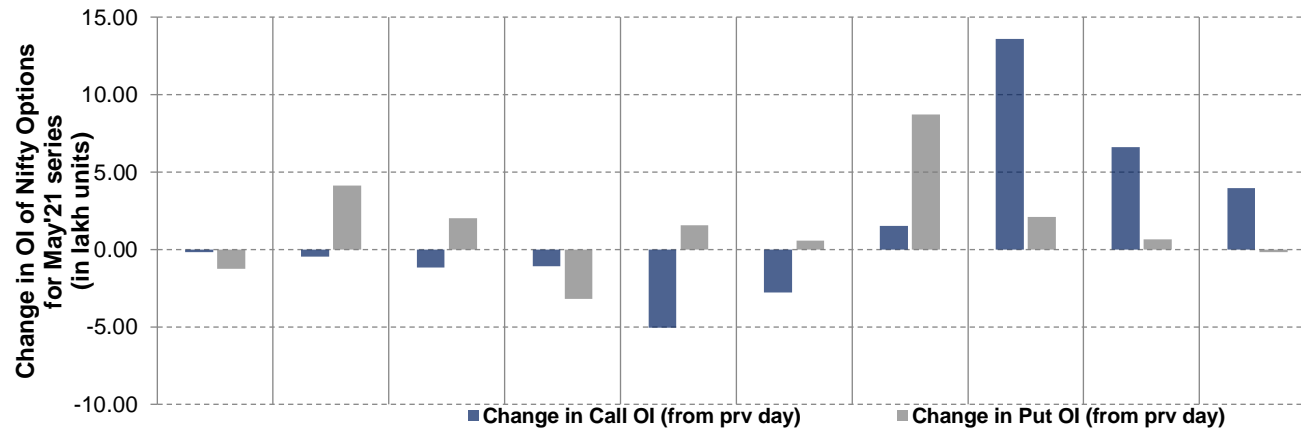
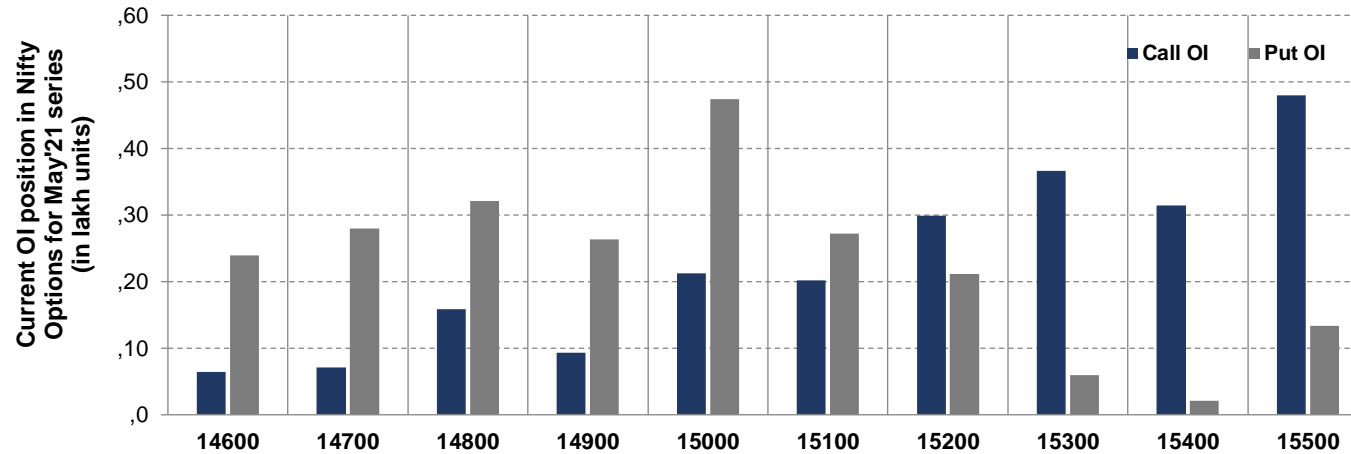
## NIFTY FUTURES



## BANK NIFTY FUTURES



## NIFTY OPTIONS



- Among Nifty calls 15,500 SP from the May month expiry was the most active call with an addition of 0.40 million in open interests.
- Among Nifty puts 15,000 SP from the May month expiry was the most active put with an addition of 0.15 million in open interests.
- The maximum OI outstanding for Calls was at 15,500 SP (4.80mn) and that for Puts was at 15,000 SP (4.74mn)



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