

Morning Mantra

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

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Table of Contents

Page No.	Particulars
1	Market Commentary
2	Market Summary and Numbers that matter
3	G-Sec Yields, Currency Futures, Dollar Index, Key Commodities Tracker & Index Trend Analysis
4	Nifty Technical
5	Nifty Futures
6	Bank Nifty Futures
7	Nifty Options
8	Disclaimer

MARKET COMMENTARY

Indian equity benchmarks ended on a strong note on Wednesday. Markets made a cautious start of the day, amid slight rise in coronavirus cases. A day after recording less than 200,000 fresh Covid cases for the first time in 41 days, India's new infections on Wednesday again soared to 208,886. Deaths from the disease rose by 4,172. The country's total cases now stand at 27,156,382, while total fatalities are at 311,421. Adding some pessimism, an SBI research report 'Ecowrap' stated that the country's GDP is likely to grow at 1.3 percent in the fourth quarter of 2020-21 and may see a contraction of around 7.3 percent for the full financial year.

Markets maintained their gaining momentum till the end of the trading session, as traders took some encouragement with Industry chamber CII stating that healthy flow of FDI into the country corroborates India's status as a preferred investment destination among global investors. FDI into the country grew 19 per cent to \$59.64 billion during 2020-21. Besides, AEPC has urged the government to declare apparel exports as essential services and exempt the exporting units from lockdowns across India.

On the global front, European markets were trading higher, as a host of central bank policymakers pledged to keep monetary policy loose despite recent signs of an uptick in inflation. Asian markets ended mostly higher on Wednesday, after Indonesia's central bank again left its key interest rates unchanged on Tuesday, citing the improving economic outlook and the rupiah stability. The board of governors decided to hold the BI 7-Day reverse repo rate at 3.50 percent. The previous change in the rate was a quarter-point reduction in February. The deposit facility rate was maintained at 2.75 percent and lending facility rates at 4.25 percent.

MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	51017.52	379.99	0.75
NIFTY	15301.45	93.00	0.61
MIDCAP	21571.42	-30.58	-0.14
SMLCAP	23512.62	160.75	0.69
BSEFMC	12979.98	8.46	0.07
AUTO	23421.78	111.65	0.48
POWER	2787.55	-65.90	-2.31
REALTY	2672.42	74.02	2.85
BSE IT	27476.15	497.88	1.85
BANKEX	39387.26	38.43	0.10
OIL GAS	16089.86	-59.18	-0.37
METAL	18239.82	-452.46	-2.42
INDIA VIX	20.87	2.03	10.77

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	1243	732	69
BSE	1904	1231	146

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	4998	5237	(5)
NSE CASH	69145	73644	(6)
NSE F&O	4280252	3806123	12

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	29.41	4.38	0.99
SENSEX	31.62	3.26	0.86

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	3624	4063	(439)
FII	5114	4873	242

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	7902.37	6612.78	1290
Index Options	429957.13	425730.62	4227
Stock Futures	30237.51	30943.92	(706)
Stock Options	14001.32	14057.57	(56)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.38	1.22
BANK NIFTY	0.79	0.75

SECURITIES BAN FOR TRADE IN F&O FOR 27-05-2021

AMARAJABAT
CANBK

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	5.972	5.977	-0.08
USA	1.555	1.564	-0.55

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	89.84	89.63	0.23

CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
27 May-21 USD-INR	72.83	-0.14	-0.19
27 May-21 EUR-INR	89.23	0.14	0.16
27 May-21 GBP-INR	103.13	0.01	0.01
27 May-21 JPY- INR	66.88	-0.14	-0.21

KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1904.02	5.78	0.30
Silver	27.88	-0.09	-0.35
Crude-Oil	65.44	-0.63	-0.95
Brent-Crude	68.10	-0.55	-0.77

INDEX TREND ANALYSIS

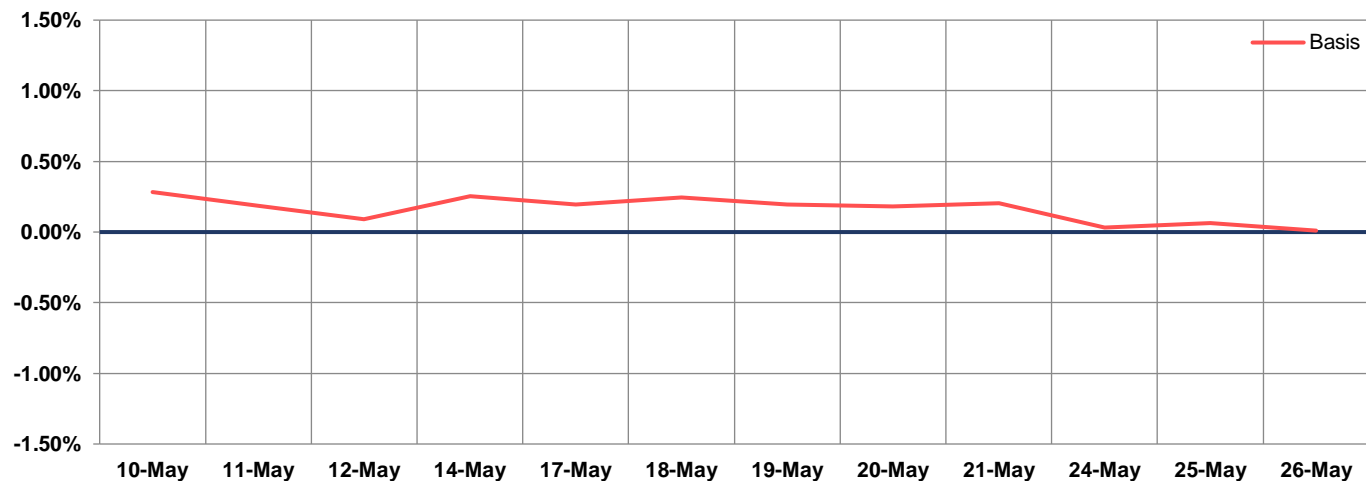
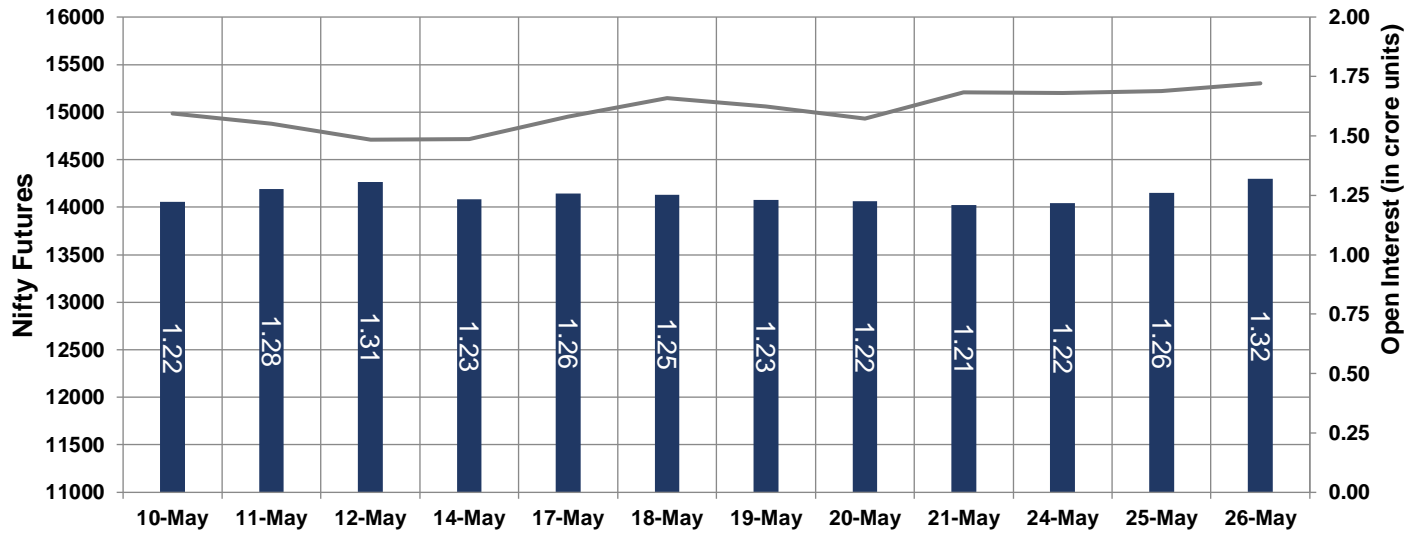
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	15301	15147	15224	15272	15349	15397	Buy	Buy	Buy
SENSEX	51018	50451	50734	50904	51187	51356	Buy	Buy	Buy
NIFTY FUTURES	15302	15148	15225	15274	15352	15401	Buy	Buy	Buy
BANK NIFTY	34684	34246	34465	34682	34901	35117	Buy	Buy	Buy
CNX IT	26857	26189	26523	26715	27049	27240	Buy	Buy	Buy
CNX MIDCAP	25566	25406	25486	25598	25678	25790	Buy	Buy	Buy
CNX SMALLCAP	9227	9183	9205	9235	9257	9287	Buy	Buy	Buy
INDIA VIX	20.87	15.73	18.30	19.80	22.37	23.87	Neutral	Sell	Neutral

NIFTY TECHNICAL & INDICES LEVEL

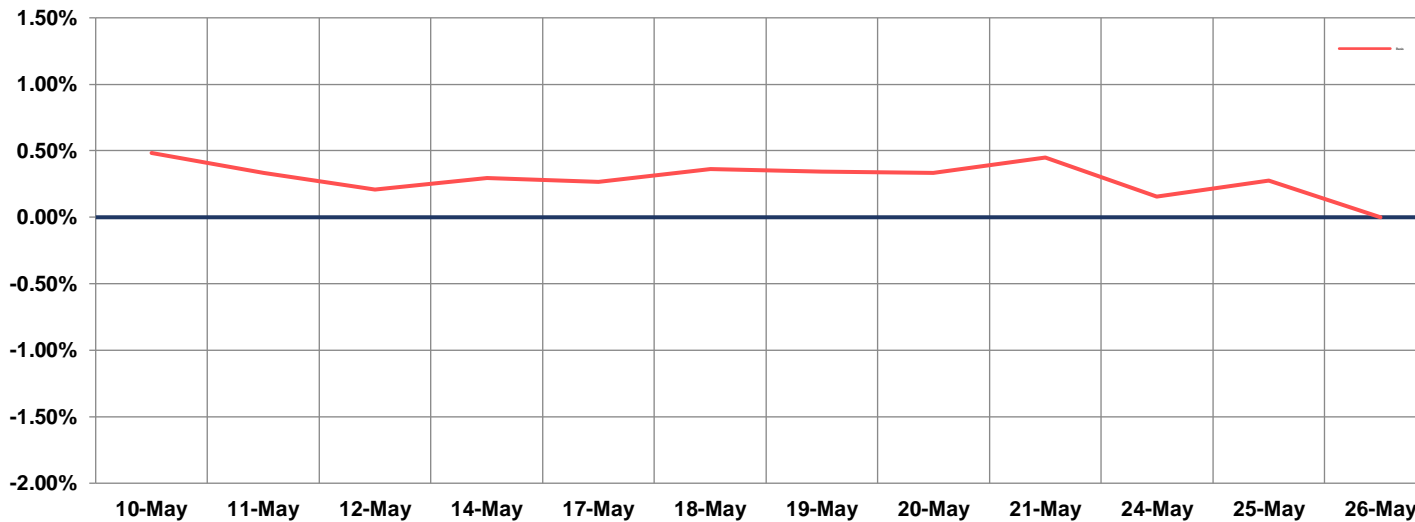
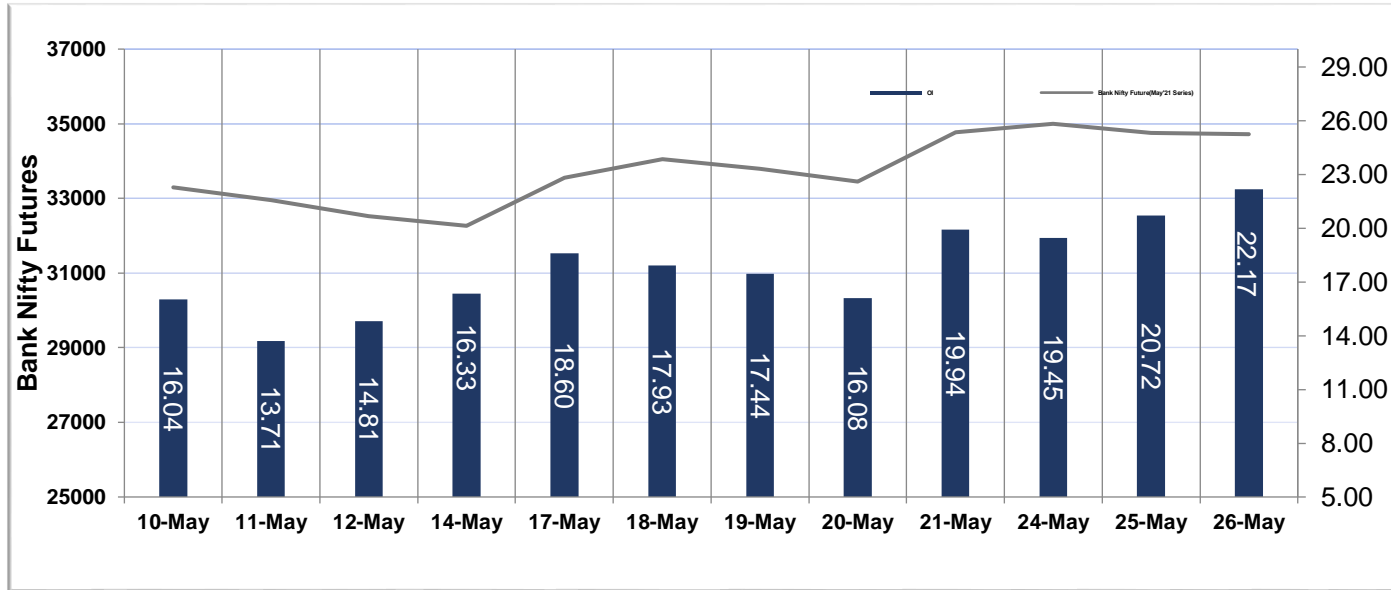


➤ Nifty Cash prices have settled at **15301.45** up by 0.61 percent from the previous close. On the upper side it has resistance of **15390** and **15435** levels, while lower side it has support of **15230** and **15160** levels. Intraday traders should be cautious and take position accordingly.

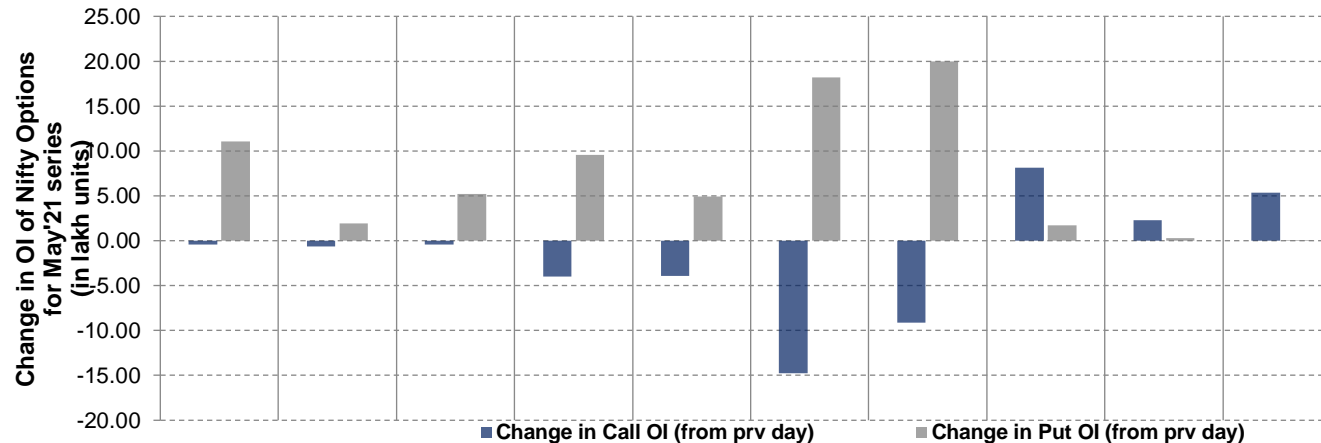
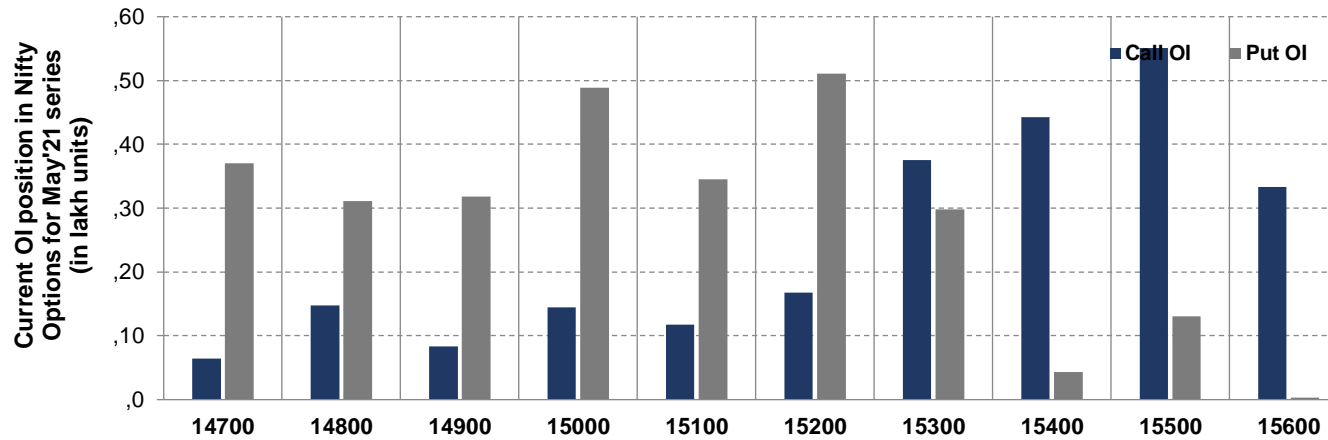
NIFTY FUTURES



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 0.23 million in open interests.
- Among Nifty puts 15,200 SP from the May month expiry was the most active put with an addition of 1.82 million in open interests.
- The maximum OI outstanding for Calls was at 15,500 SP (5.51mn) and that for Puts was at 15,200 SP (5.11mn)

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