

Morning Mantra

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

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MARKET COMMENTARY

Indian equity benchmarks ended higher on Friday. After a positive start, markets traded in green terrain during the whole trading session, as fall in coronavirus cases supported the indices. India recorded 179,770 fresh Covid-19 cases in the last 24 hours, the lowest daily count in 44 days, as infections continued to decrease in the country. Investors were eyeing the goods and services tax (GST) Council meet today after a span of seven months. As per a report, the Council is expected to discuss the compensation shortfall, which is estimated at Rs 1.6 lakh crore for the current fiscal, and is likely to be funded by borrowings this year as well.

Traders remained positive during the trading session, as asserting that a stronger India-US health partnership can be a powerful force to fight COVID-19 globally, External Affairs Minister S Jaishankar, at his meetings with top leaders of the American corporate sector, appreciated their swift response to India's fight against the pandemic. Besides, in the wake of second COVID wave and the Supreme Court order lifting the ban on classification of non-performing assets (NPAs), the Reserve Bank of India (RBI) has asked banks to closely monitor their bad loans and prepare themselves for higher provisioning.

On the global front, European markets were trading higher to end a broadly upbeat week, with traders welcoming another forecast-beating reading on US jobless claims that reinforced optimism about the recovery in the world's top economy. Asian markets ended mostly on a firm note on Friday, even after the unemployment rate in Japan came in at a seasonally adjusted 2.8 percent in April. The Ministry of Communications and Internal Affairs said that was above expectations for 2.7 percent and was up from 2.6 percent in March. The job-to-applicant ratio was 1.09 - again missing forecasts for 1.10, which would have been unchanged from the previous month.

MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	51422.88	307.66	0.60
NIFTY	15435.65	97.80	0.64
MIDCAP	21661.83	-25.64	-0.12
SMLCAP	23478.69	-112.80	-0.48
BSEFMC	12995.72	1.63	0.01
AUTO	23572.40	58.59	0.25
POWER	2782.84	-29.55	-1.05
REALTY	2644.91	2.80	0.11
BSE IT	27627.31	-74.25	-0.27
BANKEK	39863.48	6.84	0.02
OIL GAS	16251.09	188.55	1.17
METAL	18461.48	87.17	0.47
INDIA VIX	17.37	-2.54	-12.78

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	769	1206	65
BSE	1433	1699	146

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	5383	5239	3
NSE CASH	74361	120923	(39)
NSE F&O	2288101	8762792	(74)

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	28.98	4.42	0.98
SENSEX	31.90	3.29	0.85

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	6441	5166	1275
FII	5918	5004	914

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	3460.39	3022.68	438
Index Options	230505.76	228818.46	1687
Stock Futures	12863.38	13838.83	(975)
Stock Options	11574.21	12187.41	(613)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.32	1.36
BANK NIFTY	0.75	1.01

SECURITIES BAN FOR TRADE IN F&O FOR 31-05-2021

SUNTV

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.003	5.987	0.27
USA	1.613	1.610	0.19

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	90.05	89.97	0.09

CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
28 June - 21 USD-INR	72.81	-0.07	-0.10
28 June - 21 EUR-INR	88.69	-0.30	-0.34
28 June - 21 GBP-INR	103.19	0.01	0.01
28 June - 21 JPY- INR	66.24	-0.58	-0.86

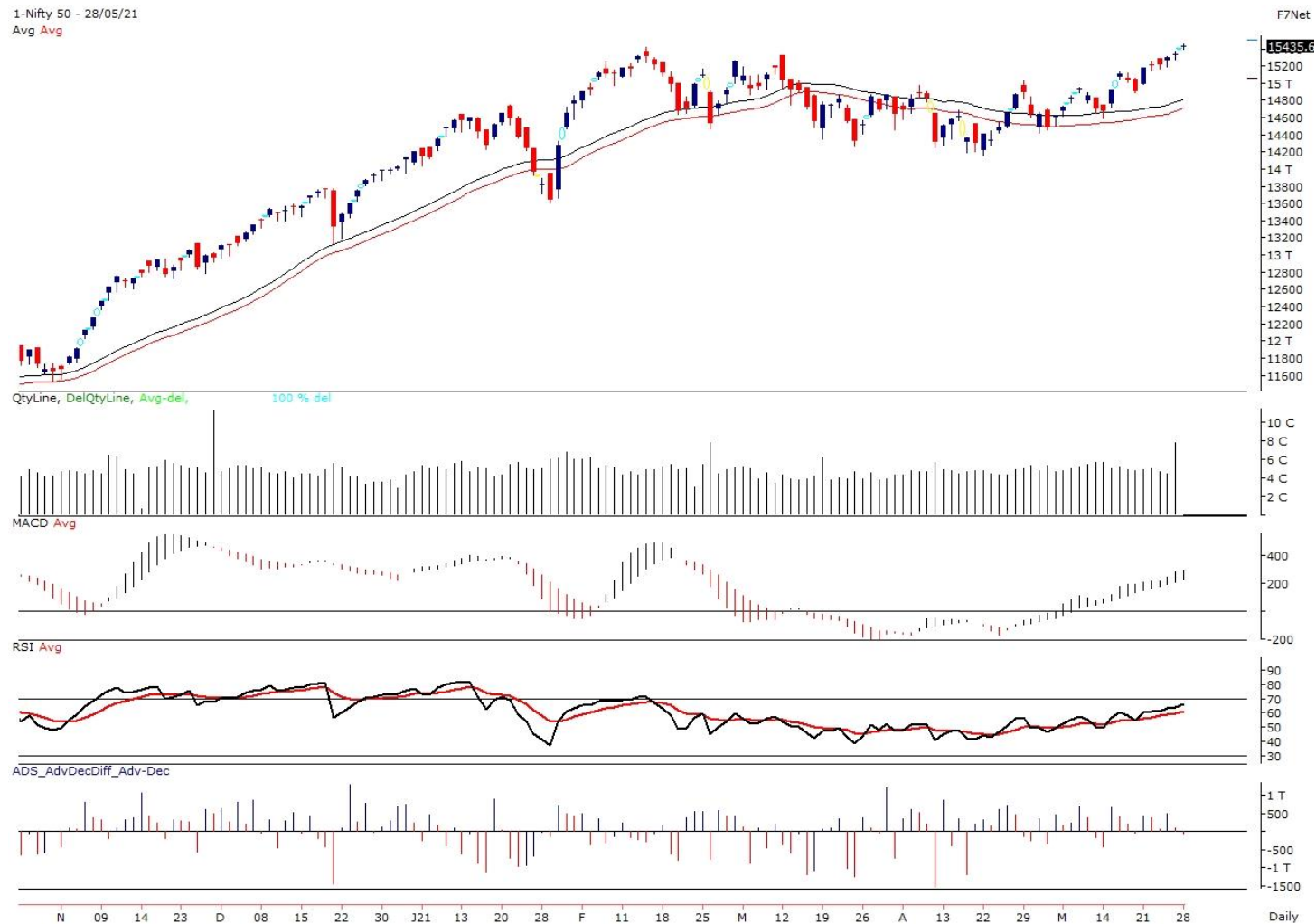
KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1902.75	4.76	0.25
Silver	27.89	0.01	0.03
Crude-Oil	66.62	-0.23	-0.34
Brent-Crude	69.02	-0.18	-0.26

INDEX TREND ANALYSIS

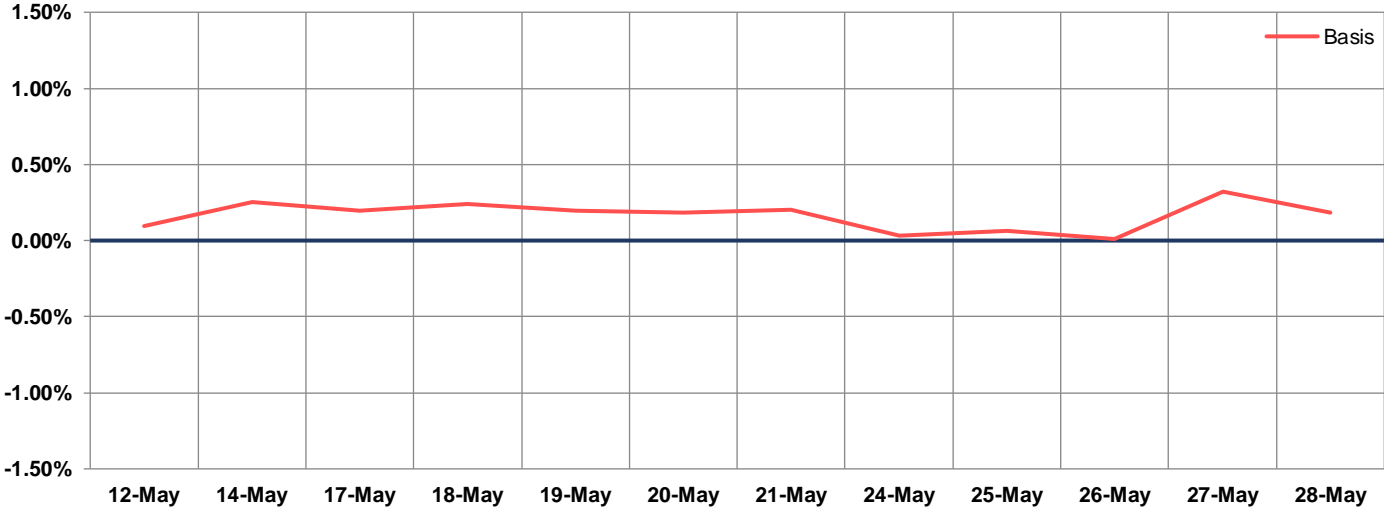
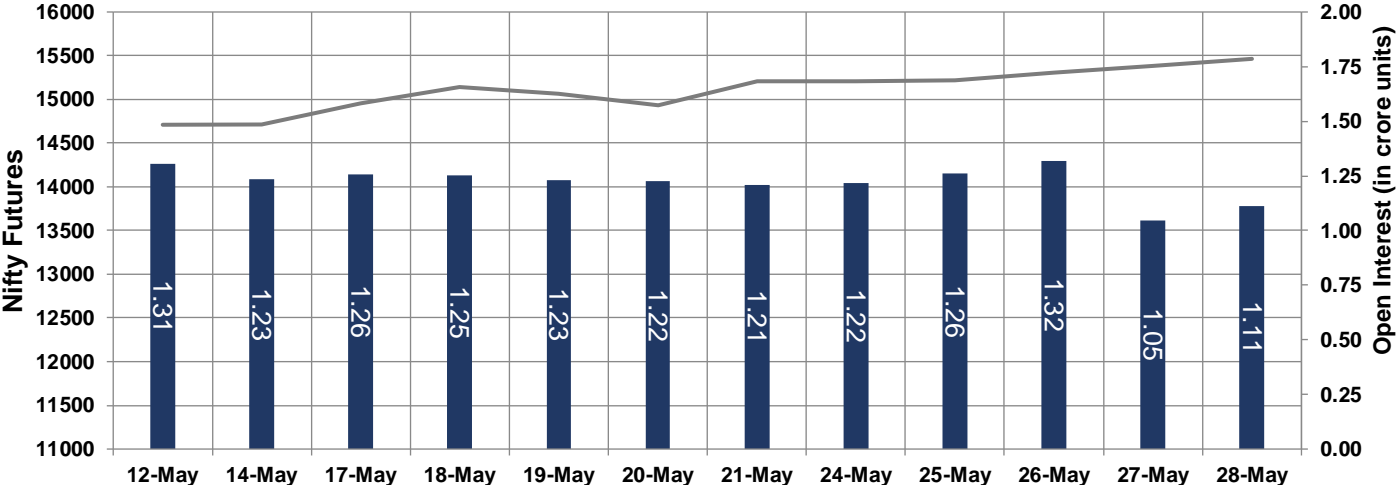
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	15436	15358	15397	15433	15472	15508	Buy	Buy	Buy
SENSEX	51423	52810	52117	51823	51129	50836	Buy	Buy	Buy
NIFTY FUTURES	15478	15386	15432	15466	15512	15546	Buy	Buy	Buy
BANK NIFTY	35141	34726	34934	35185	35393	35645	Buy	Buy	Buy
CNX IT	27123	26911	27017	27148	27254	27385	Buy	Buy	Buy
CNX MIDCAP	25695	25517	25606	25738	25826	25958	Buy	Buy	Buy
CNX SMALLCAP	9254	9148	9201	9295	9348	9442	Buy	Buy	Buy
INDIA VIX	17.40	15.67	16.54	18.22	19.09	20.77	Sell	Sell	Neutral

NIFTY TECHNICAL & INDICES LEVEL

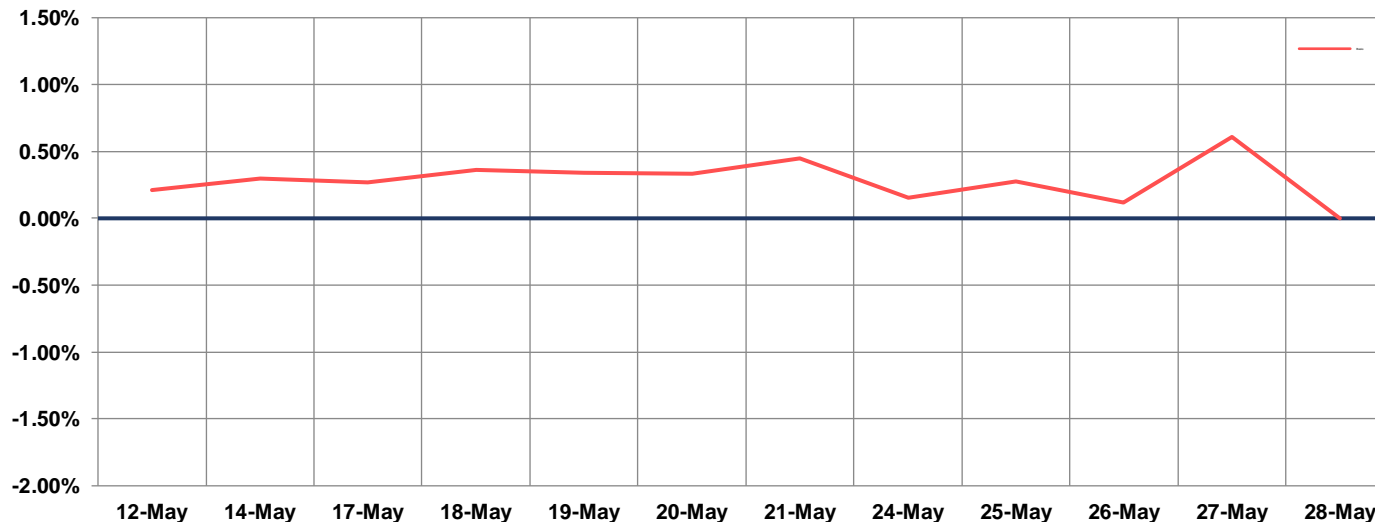
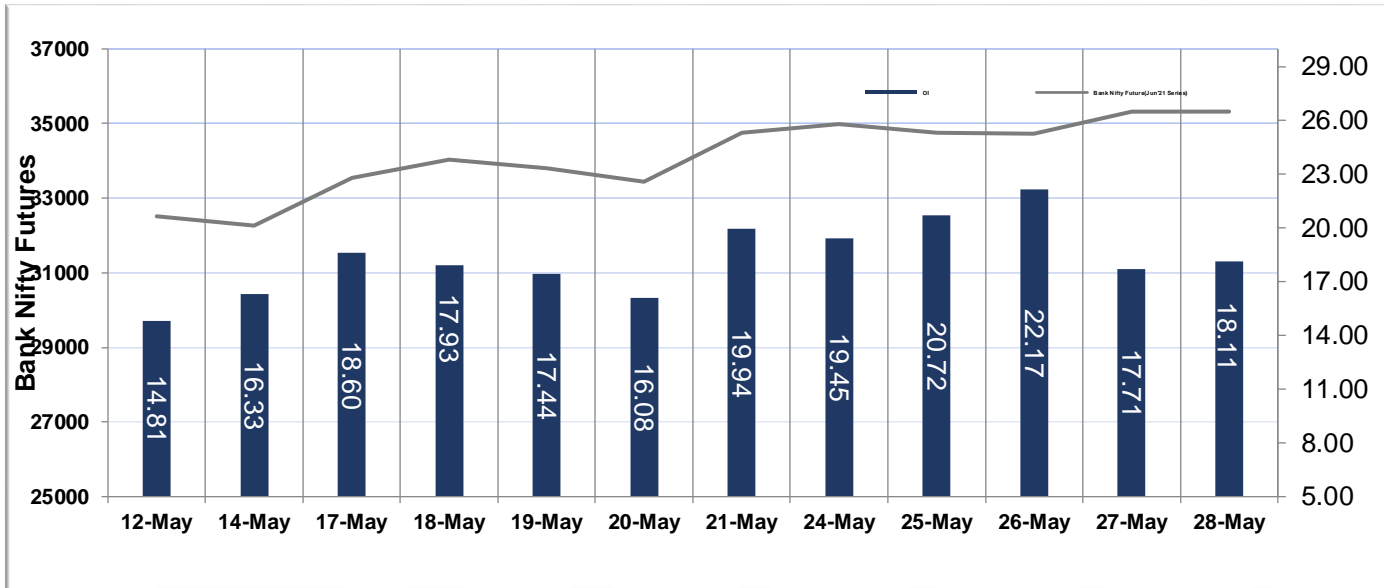


➤ Nifty Cash prices have settled at **15435.65** up by 0.64 percent from the previous close. On the upper side it has resistance of **15540** and **15610** levels, while lower side it has support of **15320** and **15270** levels. Intraday traders should be cautious and take position accordingly.

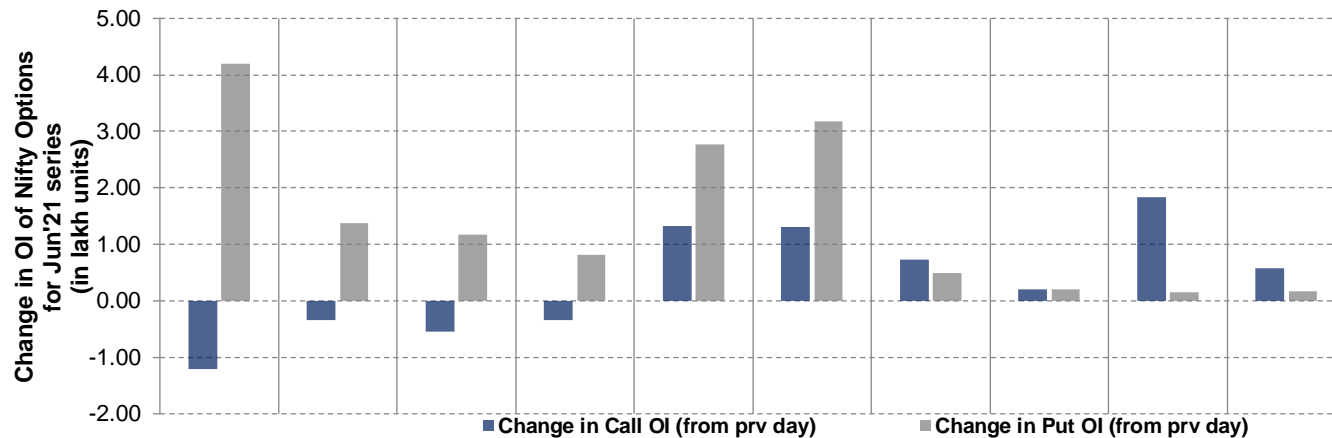
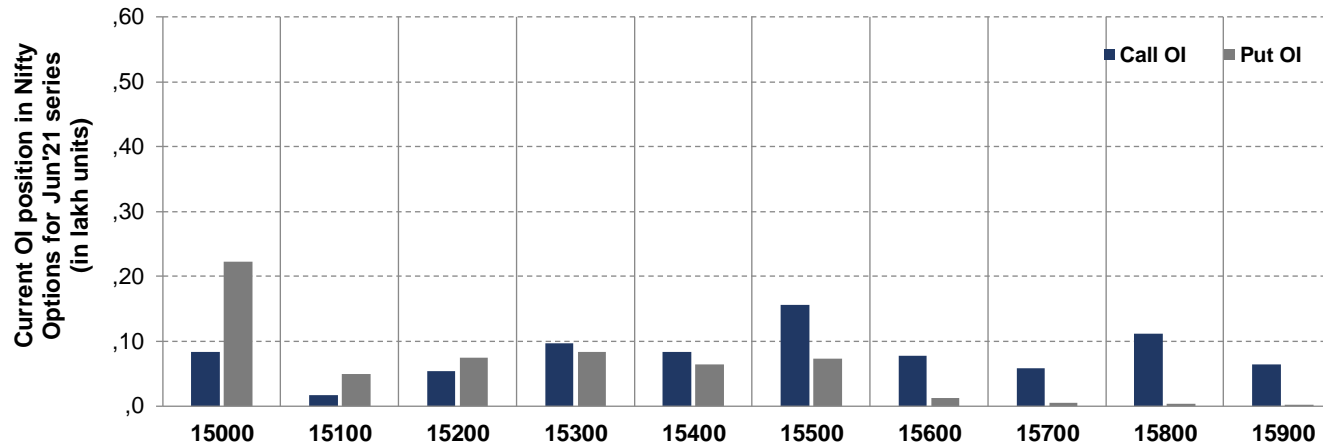
NIFTY FUTURES



BANK NIFTY FUTURES



NIFTY OPTIONS



- Among Nifty calls 15,500 SP from the June month expiry was the most active call with an addition of 0.13 million in open interests.
- Among Nifty puts 15,000 SP from the June month expiry was the most active put with an addition of 0.42 million in open interests.
- The maximum OI outstanding for Calls was at 15,500 SP (1.60mn) and that for Puts was at 15,000 SP (2.23mn)

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