

# 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 on a strong note. Markets made slightly negative start of the trading session, ahead of GDP data for the March quarter along with the core sector data for April to be out later in the day. Some cautiousness came in as an SBI Research analysis of EPFO payroll data shows that net job creation in the economy fell by 16.9 lakh in FY21 over the previous fiscal. Additionally, India Meteorological Department (IMD) said that the arrival of monsoon over Kerala is likely to be delayed by two days and it is now expected to make an onset over the state by June 3.

In the second half of the trading session, markets added more gains, taking support with Revenue Secretary Tarun Bajaj's statement that Indian economy has not suffered as much this year amid the second wave of COVID-19 as compared to last year when there was complete lockdown. Giving two scenarios, he said if Rs 1.10 lakh crore GST is collected per month, the deficit in states' revenue would be Rs 1.50 lakh crore. If Rs 1.15 lakh crore GST is collected monthly, then that deficit would be Rs 1.25 lakh crore. So since Rs 1.58 lakh crore would be borrowed this fiscal towards compensating states, the extra borrowing, over and above what is the shortfall this year, would be utilised to make good the shortfall in states' revenue of previous years.

On the global front, European markets were trading mixed, ahead of inflation data for some of the region's biggest economies. Asian markets ended mostly higher, after the manufacturing sector in China continued to expand in May, albeit at a slower pace, the latest survey from the National Bureau of Statistics showed on Monday with a manufacturing PMI score of 51.0. That was shy of expectations for 51.1, which would have been unchanged from the April reading. It does, however, remain well above the boom-or-bust line of 50 that separates expansion from contraction.

## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	51937.44	514.56	1.00
NIFTY	15582.80	147.15	0.95
MIDCAP	21758.39	96.56	0.45
SMLCAP	23595.98	117.29	0.50
BSEFMC	13130.73	135.01	1.04
AUTO	23541.12	-31.28	-0.13
POWER	2816.44	33.60	1.21
REALTY	2680.01	35.10	1.33
BSE IT	27584.81	-42.50	-0.15
BANKEK	40344.68	481.20	1.21
OIL GAS	16472.31	221.22	1.36
METAL	18877.33	415.85	2.25
INDIA VIX	16.89	-0.47	-2.97

## ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	1093	911	78
BSE	1699	1541	187

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	5316	5383	(1)
NSE CASH	72437	74361	(3)
NSE F&O	3079550	2288101	35

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	29.22	4.39	1.06
SENSEX	31.33	3.30	0.86

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

FII-DII*	Buy	Sell	Net
DII	4912	4732	180
FII	7456	5044	2412

Note: FII & DII Figures are provisional

## FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	2570.51	3260.79	(690)
Index Options	294601.52	291977.23	2624
Stock Futures	12819.43	13020.19	(201)
Stock Options	14325.32	14467.03	(142)

## PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.51	1.32
BANK NIFTY	0.93	0.75

## SECURITIES BAN FOR TRADE IN F&O FOR 01-06-2021

BANKBARODA
PNB
SUNTV

## 10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.022	6.003	0.32
USA	1.581	1.593	-0.77

## DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	89.98	90.04	-0.06

## CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
28 June - 21 USD-INR	72.90	0.08	0.11
28 June - 21 EUR-INR	88.85	0.15	0.17
28 June - 21 GBP-INR	103.30	0.11	0.11
28 June - 21 JPY- INR	66.48	0.22	0.34

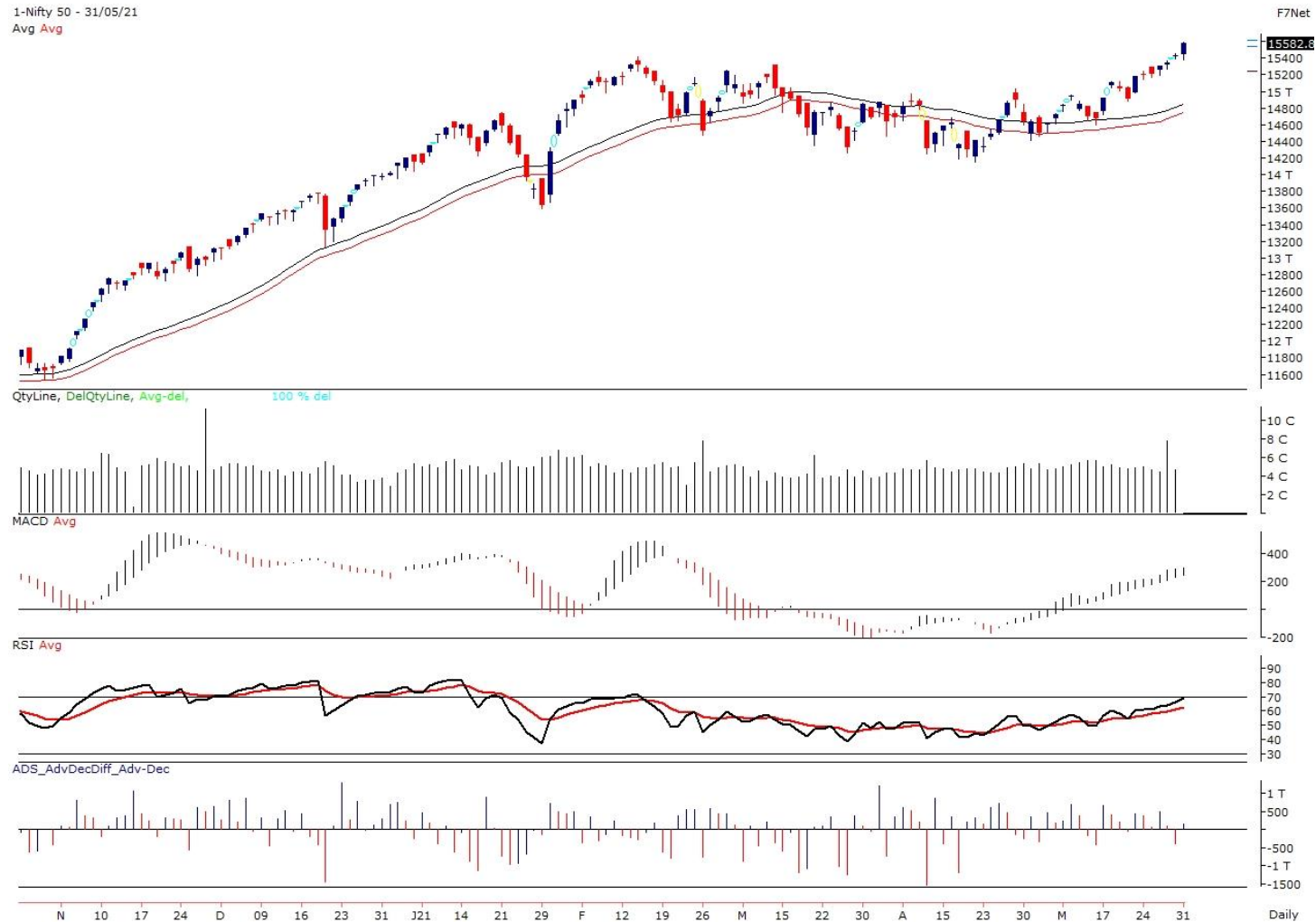
## KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1906.14	3.35	0.18
Silver	27.99	0.09	0.33
Crude-Oil	67.24	0.92	1.39
Brent-Crude	69.66	0.95	1.38

## INDEX TREND ANALYSIS

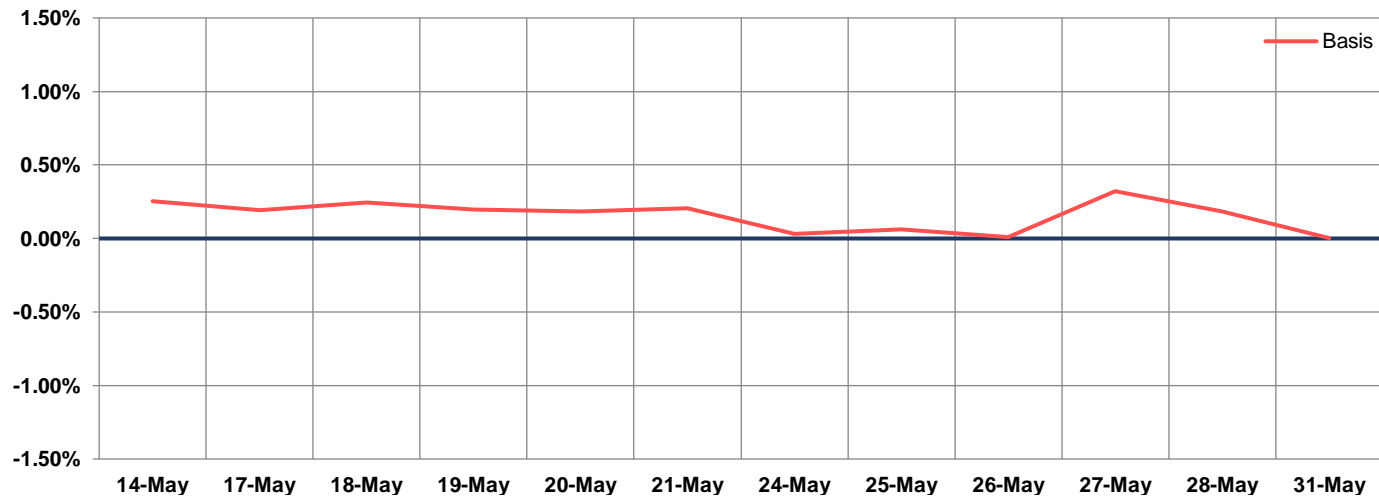
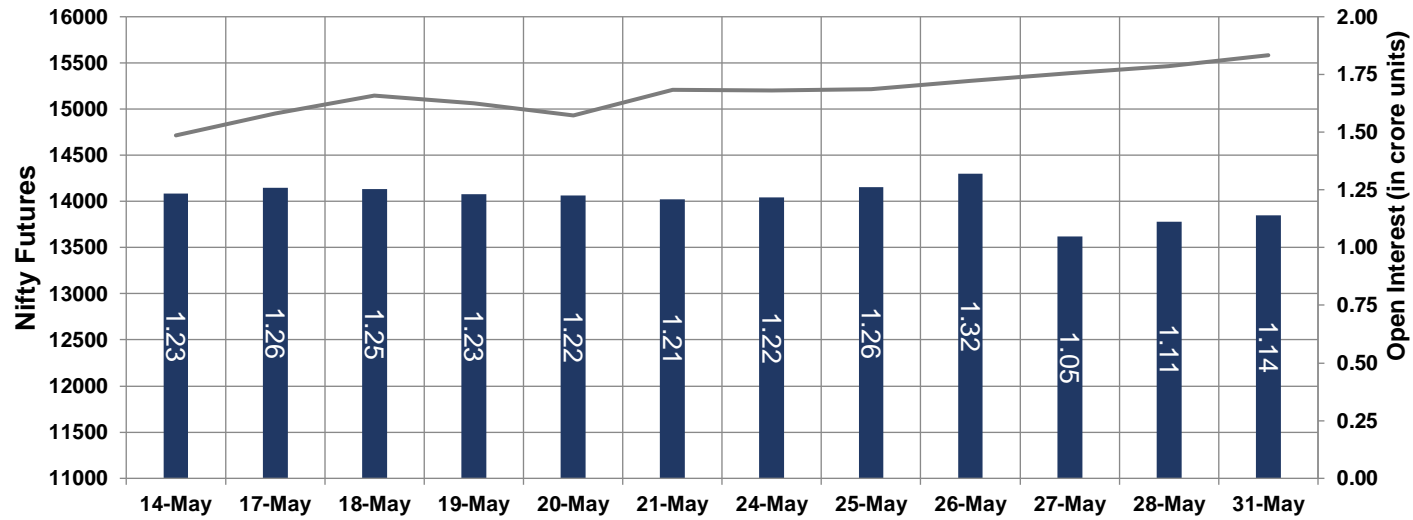
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	15583	15289	15436	15521	15668	15753	Buy	Buy	Buy
SENSEX	51937	50877	51407	51710	52240	52543	Buy	Buy	Buy
NIFTY FUTURES	15571	15337	15454	15527	15644	15717	Buy	Buy	Buy
BANK NIFTY	35527	34693	35110	35347	35764	36001	Buy	Buy	Buy
CNX IT	27115	26751	26933	27069	27250	27386	Buy	Buy	Buy
CNX MIDCAP	25775	25537	25656	25747	25866	25957	Buy	Buy	Buy
CNX SMALLCAP	9267	9195	9231	9274	9310	9354	Buy	Buy	Buy
INDIA VIX	16.89	15.54	16.21	17.10	17.77	18.66	Sell	Sell	Neutral

## NIFTY TECHNICAL & INDICES LEVEL

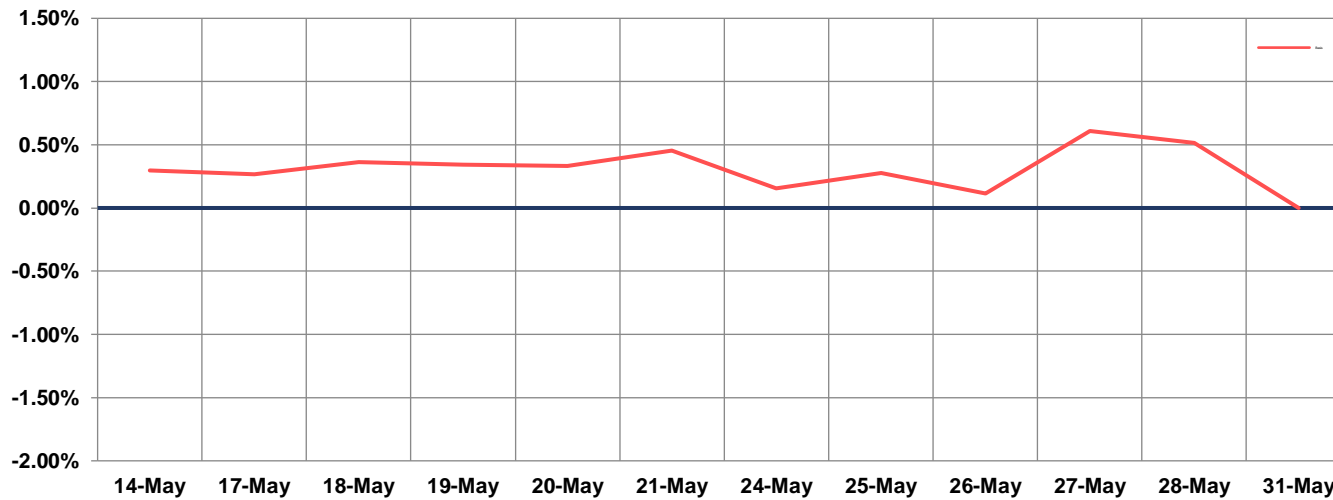
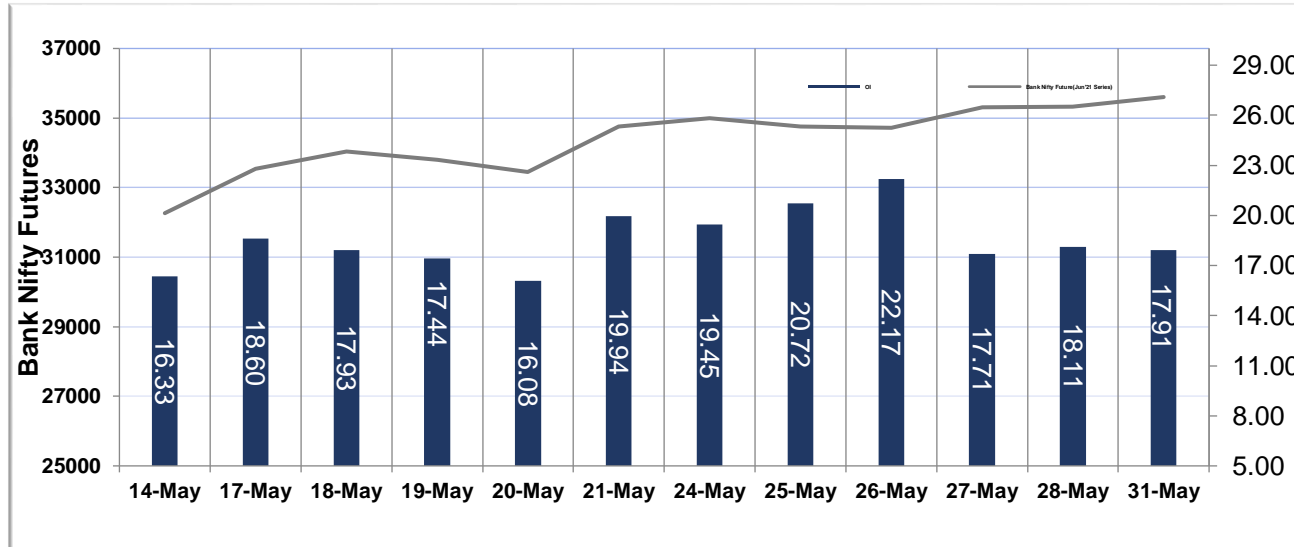


➤ Nifty Cash prices have settled at **15582.80** up by 0.95 percent from the previous close. On the upper side it has resistance of **15660** and **15730** levels, while lower side it has support of **15470** and **15390** levels. Intraday traders should be cautious and take position accordingly.

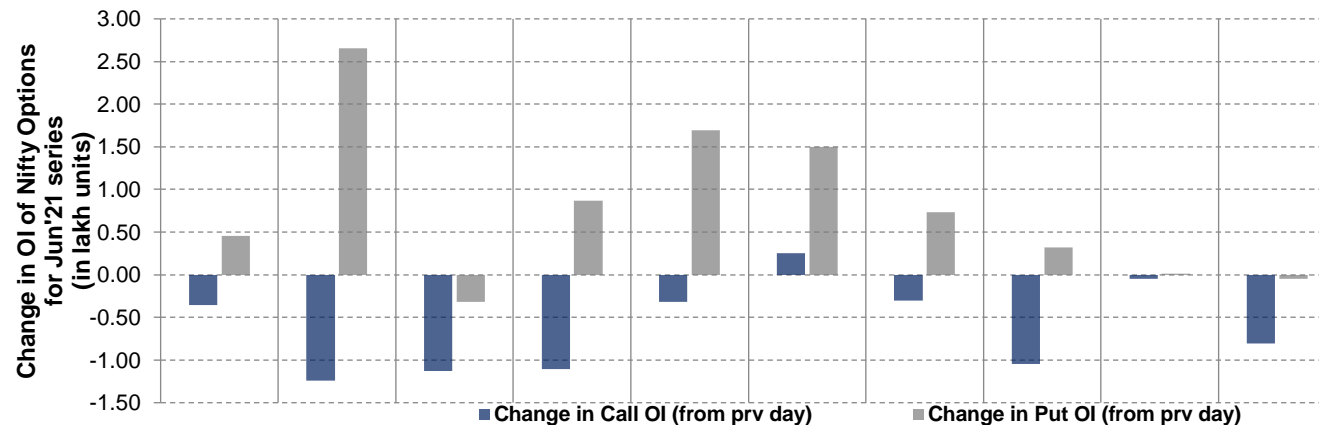
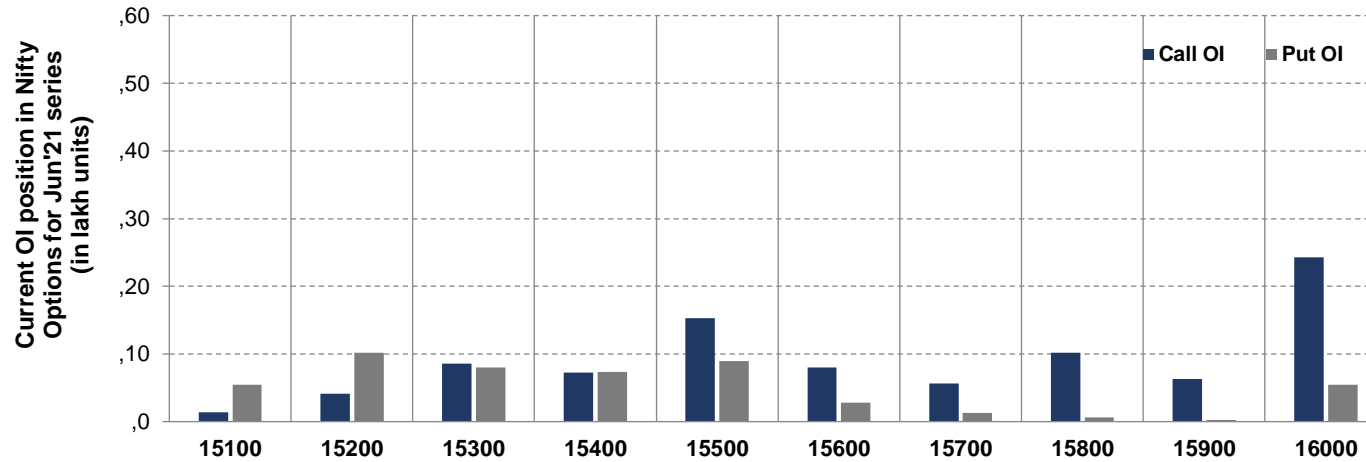
## NIFTY FUTURES



## BANK NIFTY FUTURES



## NIFTY OPTIONS



- Among Nifty calls 16,000 SP from the June month expiry was the most active call with a reduction of 0.08 million in open interests.
- Among Nifty puts 15,200 SP from the June 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 16,000 SP (2.43mn) and that for Puts was at 15,200 SP (1.01mn)



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