

Morning Mantra

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

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MARKET COMMENTARY

Indian equity benchmarks ended on a flat note on Wednesday's trading session. Key indices made a negative start of the trading day, as domestic sentiments were negative after Centre for Monitoring Indian Economy (CMIE) chief executive Mahesh Vyas has said that over 10 million Indians have lost their jobs because of the second wave of COVID-19, and around 97 per cent of households' incomes have declined since the beginning of the pandemic last year. Some concerns also came amid report stating that India reported 133,228 fresh Covid-19 infections, taking the caseload to 28,306,883. With 3,205 new fatalities, the death toll is now at 335,114, Worldometer showed. India continues to be the second worst-hit nation.

Weak trade continued over the Dalal Street for the almost whole day, amid reports that even though the cost of funds for the Centre has been trending down following the deft yield management by the Reserve Bank, for the hapless states, whose finances are crippled by the continuing lockdowns, it has been heading north and so far this fiscal as the average interest rate on their market borrowings has jumped 30 bps to 6.86 per cent. In the last hour of the trade, indices cut losses to end flat, after India's exports grew by 67.39 per cent to \$32.21 billion in May driven by healthy growth in sectors such as engineering, pharmaceuticals, petroleum products and chemicals. Exports in May last year stood at \$19.24 billion and in May 2019 it was at \$29.85 billion. Meanwhile, Minister of Agriculture and Farmers Welfare Narendra Singh Tomar has said that the dream of a self-reliant and digital India will only be realized by taking along the agriculture sector.

On the global front, European markets were trading higher, helped by energy and consumer stocks, while strong economic data from U.S. and Europe buoyed investors' sentiment. Asian markets ended mostly higher on Wednesday, after the manufacturing sector in Indonesia continued to expand in May, and at a faster pace, the latest survey from Markit Economics revealed on Wednesday with a record-high manufacturing PMI score of 55.3. That's up from 54.6 and it moves further above the boom-or-bust line of 50 that separates expansion from contraction. The two biggest components of the headline index, output and new orders, were the main contributors to the record improvement of the manufacturing sector in May. Firms saw a stronger increase in overall demand, supported by a second month of international new order growth, which led to rising manufacturing production in May.

MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	51849.48	-85.40	-0.16
NIFTY	15576.20	1.35	0.01
MIDCAP	22140.66	379.96	1.75
SMLCAP	23826.12	303.13	1.29
BSEFMC	13075.01	-59.83	-0.46
AUTO	23868.14	390.52	1.66
POWER	2866.70	50.67	1.80
REALTY	2706.45	40.40	1.52
BSE IT	27374.45	-147.26	-0.54
BANDEX	40057.48	-63.42	-0.16
OIL GAS	16703.53	114.73	0.69
METAL	18840.63	270.12	1.45
INDIA VIX	17.21	-0.18	-1.02

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	1327	586	63
BSE	2103	1013	168

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	5452	4534	20
NSE CASH	74428	64555	15
NSE F&O	4328023	3932626	10

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	28.88	4.39	1.06
SENSEX	31.15	3.28	0.87

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	4657	4416	242
FII	11511	10590	921

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	2730.62	3837.85	(1107)
Index Options	435858.84	436405.45	(547)
Stock Futures	17264.80	17199.81	65
Stock Options	13730.64	13739.34	(9)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.27	1.32
BANK NIFTY	0.76	0.72

SECURITIES BAN FOR TRADE IN F&O FOR 03-06-2021

BANKBARODA
SAIL
SUNTV

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.005	6.025	-0.33
USA	1.596	1.615	-1.18

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	89.91	89.83	0.09

CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
28 June - 21 USD-INR	73.40	0.23	0.32
28 June - 21 EUR-INR	89.32	-0.11	-0.12
28 June - 21 GBP-INR	103.61	-0.11	-0.11
28 June - 21 JPY- INR	66.83	0.07	0.11

KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1903.87	5.01	0.26
Silver	28.05	0.21	0.74
Crude-Oil	68.46	0.76	1.14
Brent-Crude	71.04	0.78	1.11

INDEX TREND ANALYSIS

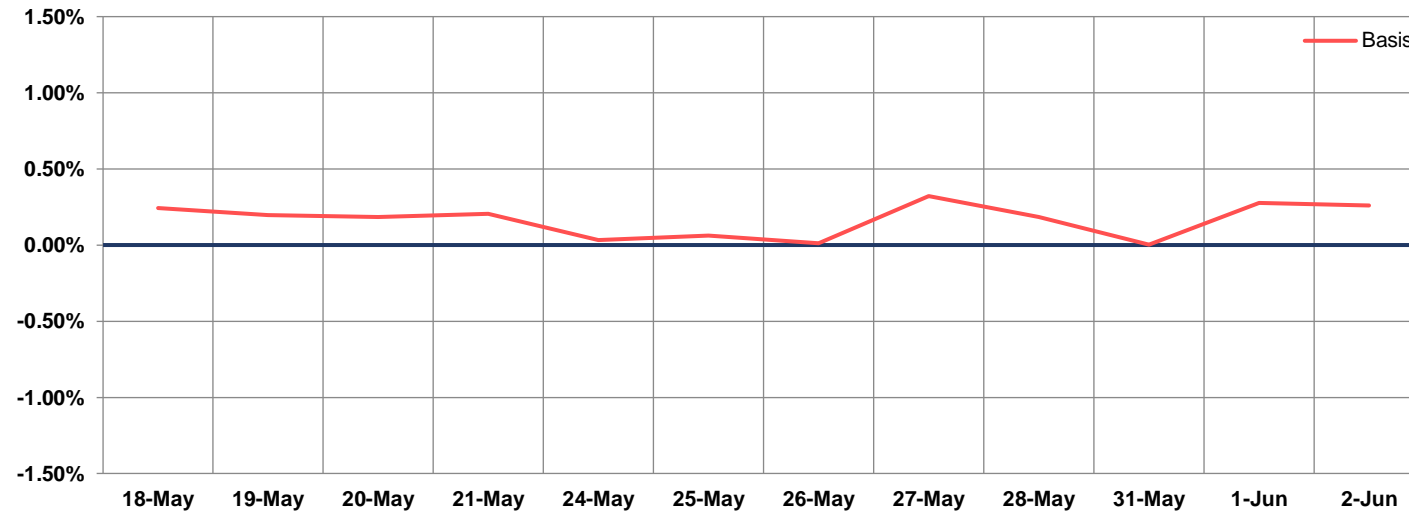
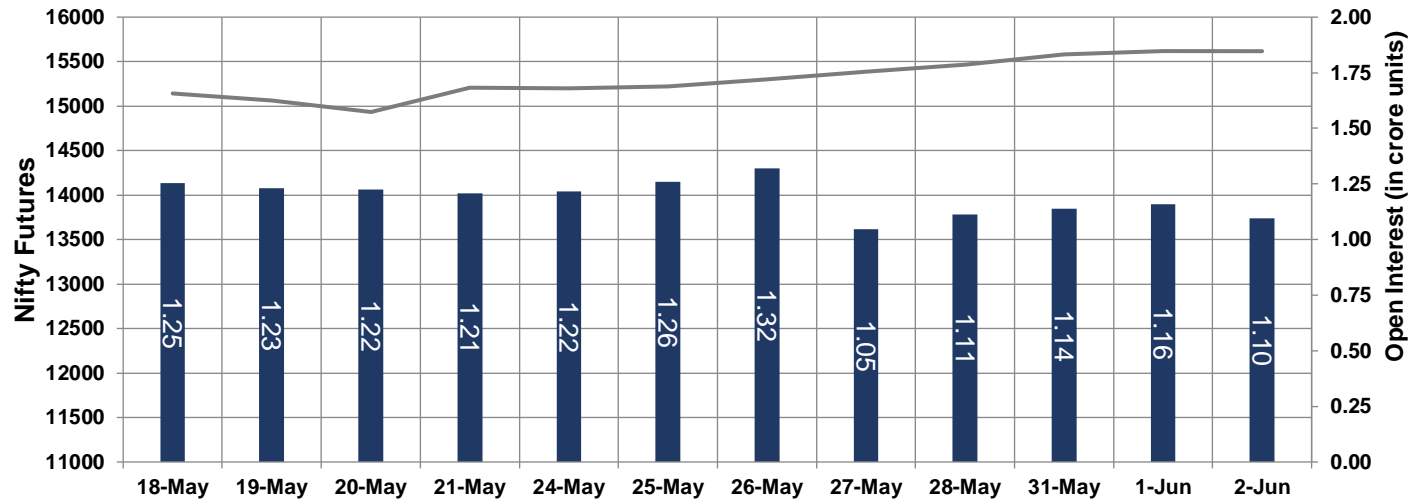
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	15576	15407	15492	15545	15629	15682	Buy	Buy	Buy
SENSEX	51849	51275	51562	51738	52025	52201	Buy	Buy	Buy
NIFTY FUTURES	15625	15457	15541	15587	15671	15717	Buy	Buy	Buy
BANK NIFTY	35374	34941	35157	35287	35503	35632	Buy	Buy	Buy
CNX IT	26940	26550	26745	26932	27127	27313	Buy	Buy	Buy
CNX MIDCAP	26118	25578	25848	26000	26270	26422	Buy	Buy	Buy
CNX SMALLCAP	9328	9183	9255	9296	9369	9409	Buy	Buy	Buy
INDIA VIX	17.21	14.20	15.70	16.68	18.18	19.16	Sell	Sell	Neutral

NIFTY TECHNICAL & INDICES LEVEL

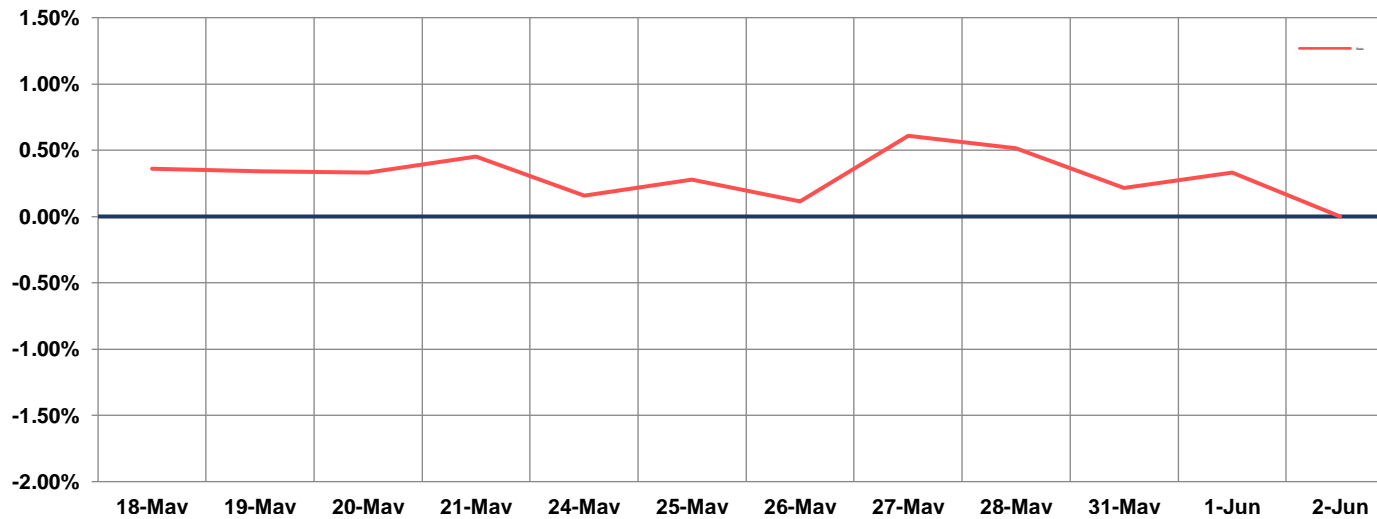
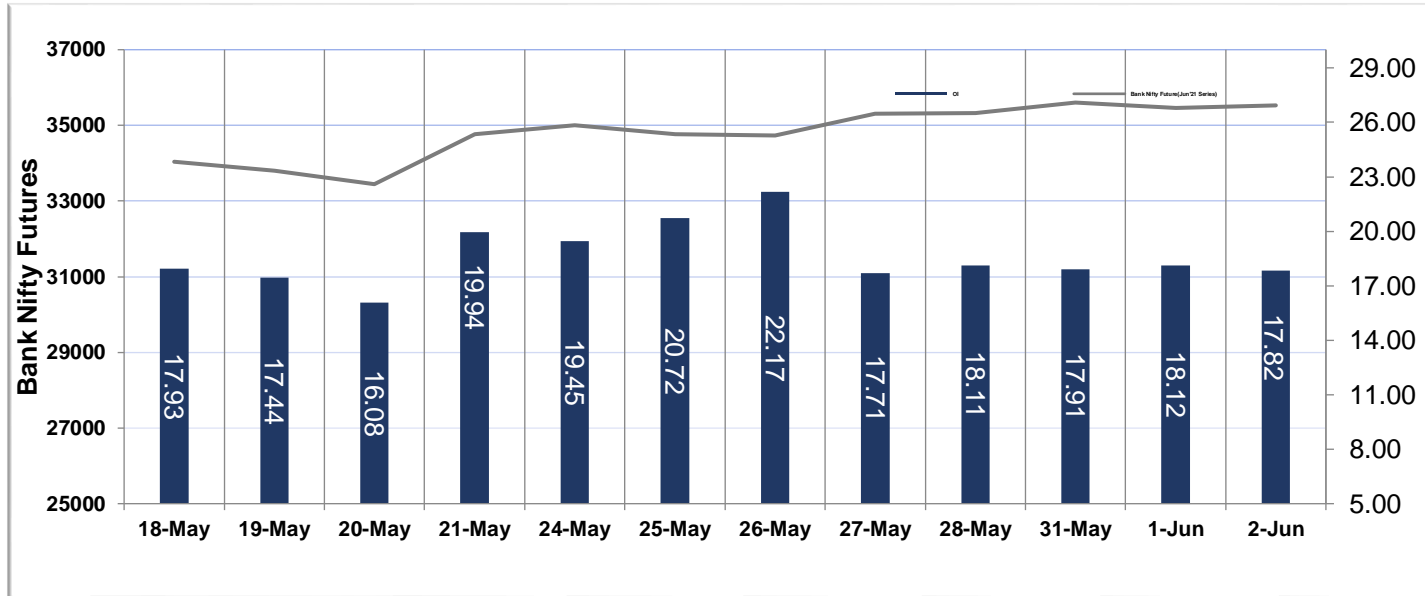


- Nifty Cash prices have settled at **15576.20** marginally up by 0.01 percent from the previous close. On the upper side it has resistance of **15680** and **15730** levels, while lower side it has support of **15440** and **15390** levels. Intraday traders should be cautious and take position accordingly.

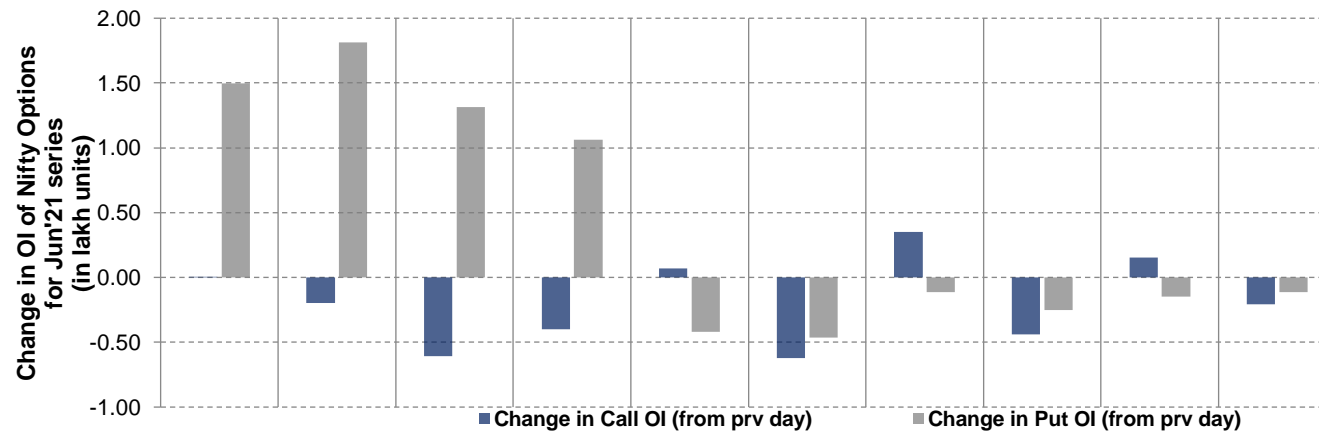
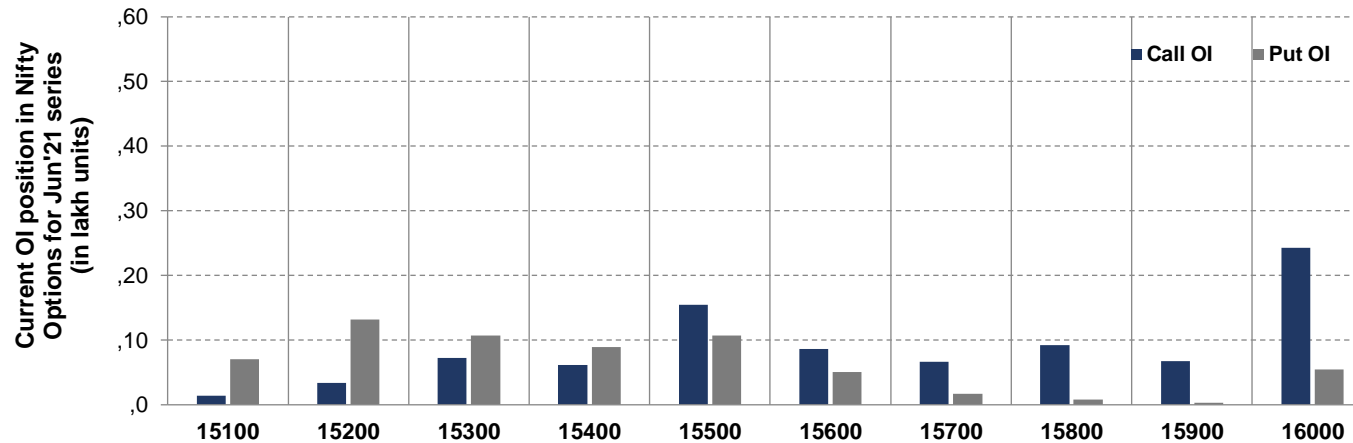
NIFTY FUTURES



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 0.02 million in open interests.
- Among Nifty puts 15,200 SP from the June month expiry was the most active put with an addition of 0.18 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 (1.32mn)

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