

Morning Mantra

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

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MARKET COMMENTARY

Indian equity benchmarks ended with strong gains on Thursday. After a positive start, indices remained higher for the whole day, as fall in daily coronavirus cases aided the sentiments in markets. Fresh infections continued to fall as it has been seven days since cases have not breached 200,000-mark. India reported 134,105 fresh Covid-19 infections, taking the caseload to 28,440,988. Also, the Union health ministry said India has achieved a significant milestone as the cumulative Covid-19 vaccination coverage has crossed the 22 crore-mark. Some support came in as Minister of State for Finance Anurag Thakur said the Indian economy is resilient, and will rebound based on reforms that have ensured strong fundamentals. However, some gains got trimmed over the Dalal street during afternoon deals, after India's services sector activities slumped into contraction territory for the first time in eight months, amid renewed decline in new work intakes due to the escalation of the pandemic and the reintroduction of restrictions.

In the last hours of the trade, key indices again added gains to end near their intraday high points, as sentiments remained positive with Credit ratings agency Crisil in its latest report stating that the expanded Emergency Credit Line Guarantee Scheme (ECLGS) will help businesses like hotels, civil aviation and tour operators, which are the hardest hit by the second wave of COVID-19. It will also support build-up of healthcare infrastructure, mainly oxygen availability, in tier-2 and beyond cities and the hinterland. Traders took a note of Assocham's report in which it has recommended the government to extend relief measures such as regulatory easing, wage support, and interest subsidy for the Micro Small and Medium Enterprises (MSMEs) which are reeling under the severe impact of COVID-19.

On the global front, European markets were trading lower, as investors awaited U.S. economic data to gauge the future path of monetary policy, while rating actions and ex-dividend trading knocked UK shares lower. Asian markets ended mostly higher on Thursday, after the private sector in Singapore continued to expand in May, and at a faster pace, the latest survey from Markit Economics showed on Thursday with a services PMI score of 54.4. That's up from 51.8 in April and it moves further above the boom-or-bust line of 50 that separates expansion from contraction. Both manufacturing and services registered stronger performances in May, but the construction sector saw a sharp downturn. The finance and insurance sub-sector registered another rapid rate of expansion in activity.

MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	52232.43	382.95	0.74
NIFTY	15690.35	114.15	0.73
MIDCAP	22370.45	229.79	1.04
SMLCAP	24075.06	248.94	1.04
BSEFMC	13142.05	67.04	0.51
AUTO	23893.25	25.11	0.11
POWER	2880.92	14.22	0.50
REALTY	2813.31	106.86	3.95
BSE IT	27460.58	86.13	0.31
BANDEX	40419.30	361.82	0.90
OIL GAS	16912.19	208.66	1.25
METAL	18910.21	69.58	0.37
INDIA VIX	15.75	-1.46	-8.48

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	1354	625	63
BSE	2141	1039	131

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	5801	5452	6
NSE CASH	74809	74428	1
NSE F&O	8075405	4328023	87

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	29.10	4.43	1.07
SENSEX	31.56	3.32	0.96

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	4726	5005	(279)
FII	7324	6244	1079

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	3429.62	2869.86	560
Index Options	640804.01	643812.47	(3008)
Stock Futures	14240.31	15094.47	(854)
Stock Options	15954.58	16200.62	(246)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.35	1.27
BANK NIFTY	0.89	0.76

SECURITIES BAN FOR TRADE IN F&O FOR 04-06-2021

BANKBARODA
PNB
SAIL
SUNTV

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	5.997	6.005	-0.13
USA	1.616	1.591	1.60

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	90.53	90.51	0.02

CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
28 June - 21 USD-INR	73.11	-0.28	-0.38
28 June - 21 EUR-INR	89.13	-0.18	-0.20
28 June - 21 GBP-INR	103.68	0.08	0.08
28 June - 21 JPY- INR	66.60	-0.22	-0.33

KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1866.98	-3.90	-0.21
Silver	27.37	-0.07	-0.25
Crude-Oil	68.46	-0.35	-0.51
Brent-Crude	70.98	-0.33	-0.46

INDEX TREND ANALYSIS

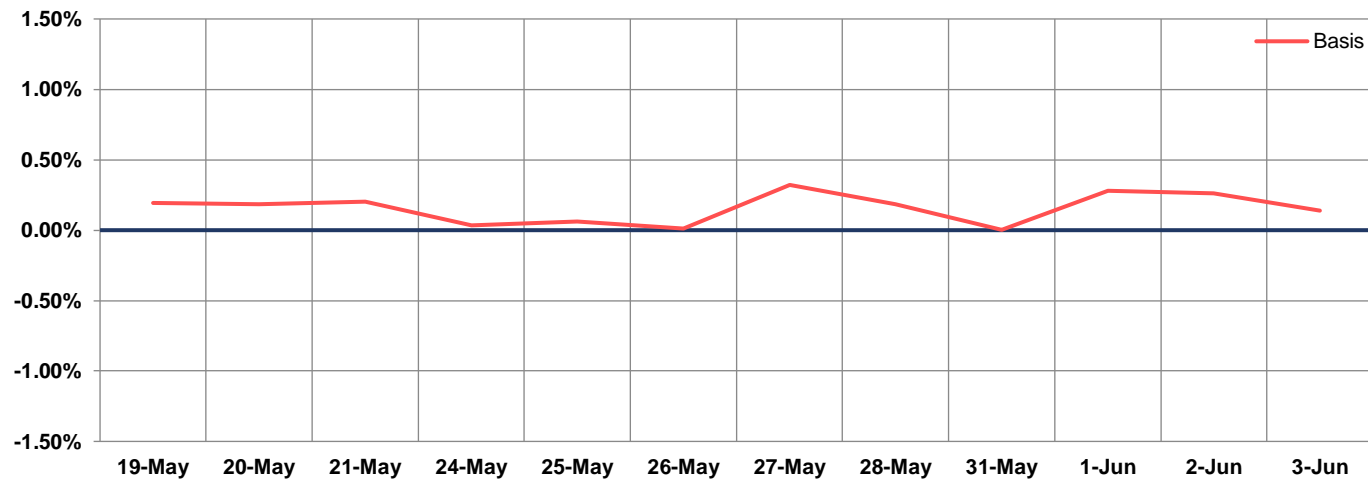
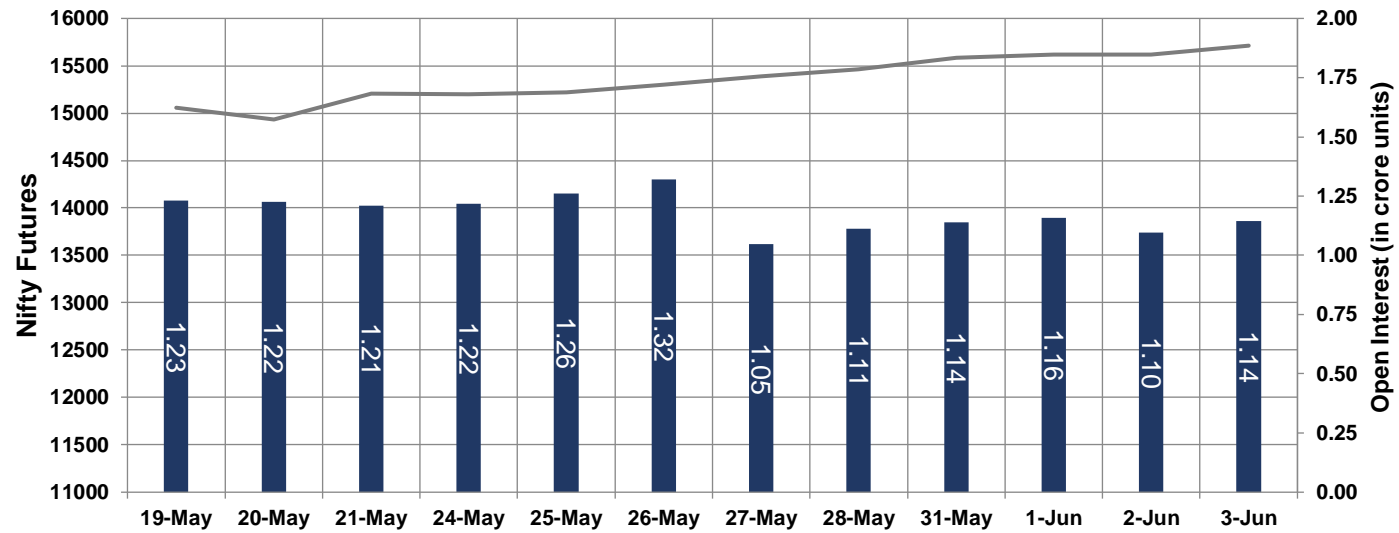
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	15690	15575	15633	15669	15727	15763	Buy	Buy	Buy
SENSEX	52232	51818	52025	52149	52356	52480	Buy	Buy	Buy
NIFTY FUTURES	15715	15606	15660	15690	15745	15774	Buy	Buy	Buy
BANK NIFTY	35649	35285	35467	35595	35777	35906	Buy	Buy	Buy
CNX IT	26988	26696	26842	27001	27147	27306	Buy	Buy	Buy
CNX MIDCAP	26363	26173	26268	26338	26433	26503	Buy	Buy	Buy
CNX SMALLCAP	9440	9381	9411	9432	9462	9484	Buy	Buy	Buy
INDIA VIX	15.74	12.64	14.19	15.70	17.25	18.76	Sell	Sell	Neutral

NIFTY TECHNICAL & INDICES LEVEL

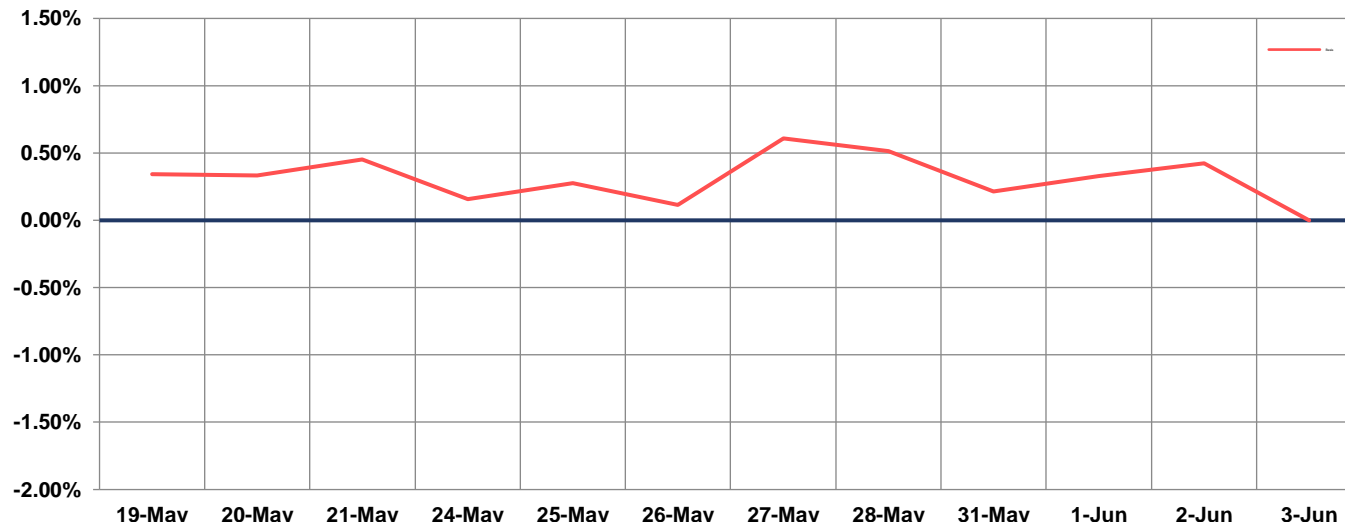
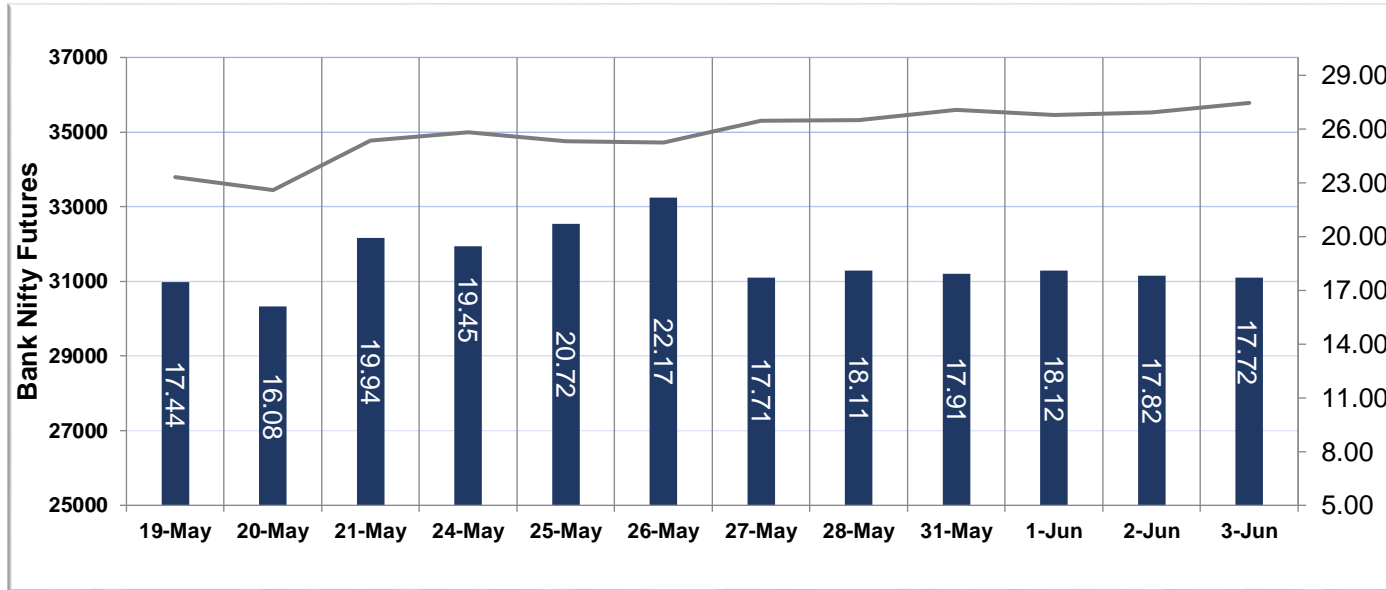


- Nifty Cash prices have settled at **15690.35** up by 0.73 percent from the previous close. On the upper side it has resistance of **15760** and **15820** levels, while lower side it has support of **15570** and **15480** levels. Intraday traders should be cautious and take position accordingly.

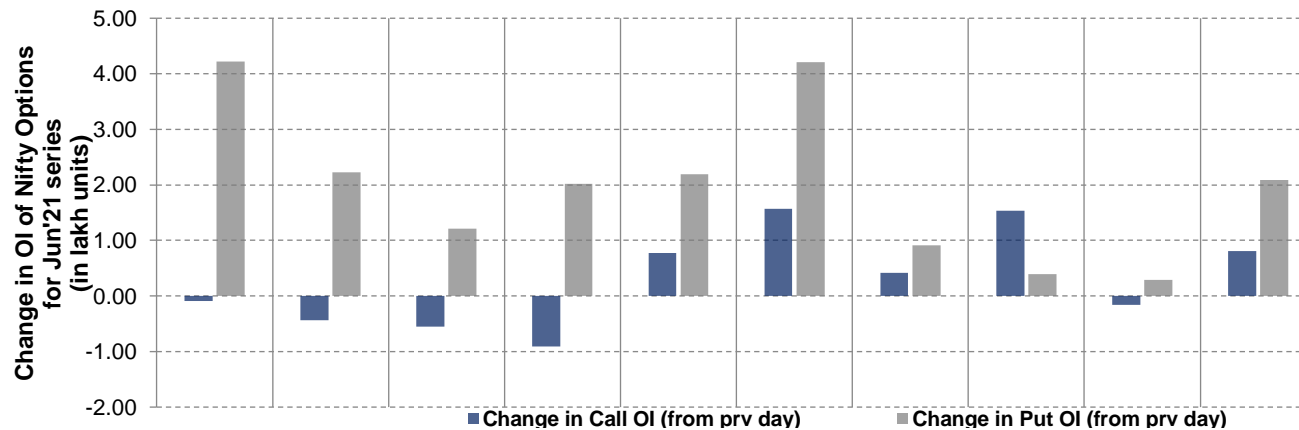
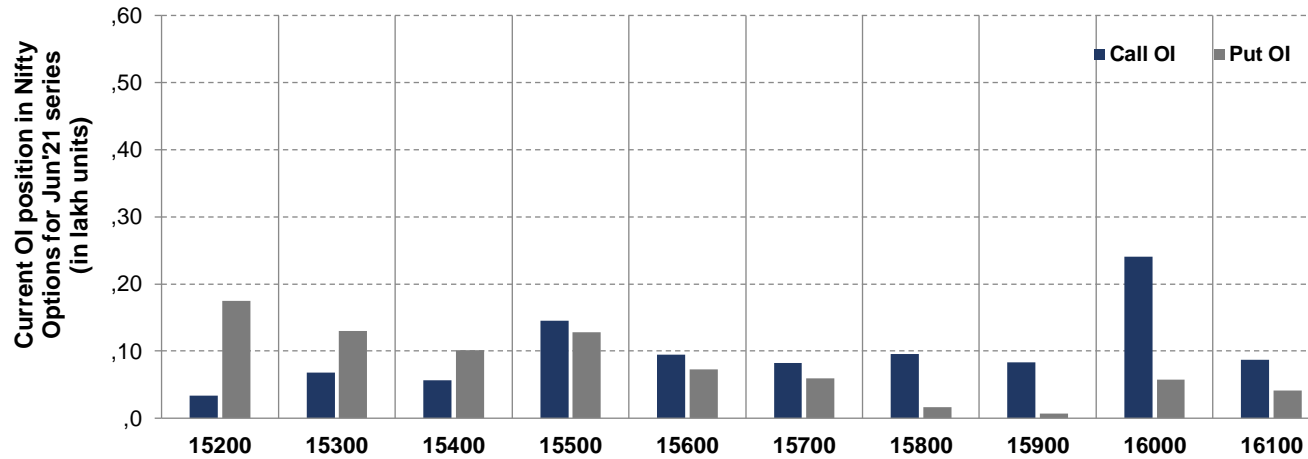
NIFTY FUTURES



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 0.22 million in open interests.
- The maximum OI outstanding for Calls was at 16,000 SP (2.41mn) and that for Puts was at 15,200 SP (1.74mn)

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