

Morning Mantra

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

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MARKET COMMENTARY

Indian equity benchmarks ended higher on Monday. After a positive start of the day, markets remained in green for the most part of the trading session, as the rapid fall in fresh Covid-19 infection cases supported the markets. With a little over 100,000 new infections across India in the past 24 hours, daily cases in the country have dropped to the lowest level seen in over two months, marking a decline in the brutal second wave of Covid-19. India reported 101,232 new infections. Among major Indian states, Delhi, Tamil Nadu, Uttar Pradesh, Maharashtra and Gujarat have announced the partial lifting of restrictions from today. Adding more optimism, GST tax collections remained above Rs 1 lakh crore mark for the eighth straight month in May, indicating that the impact of the devastating second wave of Covid infections on the economy may have been limited.

Traders were positive during the day, amid reports that India is likely to benefit from the global minimum 15 percent corporate tax rate pact inked by the world's richest nations as the effective domestic tax rate is above the threshold, and the country would continue to attract investment. Domestic sentiments also remained optimistic, as foreign investors have infused close to Rs 8,000 crore into Indian equities in the first four trading sessions of June as risk-on sentiment improved amid rapidly falling new Covid cases and robust corporate earnings. Besides, with an aim to provide taxpayer convenience and a modern, seamless experience to taxpayers, the Income Tax Department is launching its new e-filing portal on June 7, 2021. This is another initiative by CBDT towards providing ease of compliance to its taxpayers and other stakeholders.

On the global front, European markets were trading mostly in red as traders absorbed an environment where jobs growth is lagging behind the broader economic recovery. Asian market ended mostly higher on Monday, after China's exports continued to grow albeit at a slower than expected pace in May and imports logged a sharp expansion largely due to higher commodity prices and low base of comparison. According to the General Administration of Customs, China's exports advanced 27.9 year-on-year in May, but slower than the forecast of 32.1 percent. At the same time, imports surged 51.1 percent annually, slightly slower than the expected increase of 51.5 percent.

MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	52328.51	228.46	0.44
NIFTY	15751.65	81.40	0.52
MIDCAP	22688.05	176.56	0.78
SMLCAP	24597.37	335.47	1.38
BSEFMC	13209.52	119.20	0.91
AUTO	24198.68	168.73	0.70
POWER	2962.51	76.77	2.66
REALTY	2805.97	-12.28	-0.44
BSE IT	27706.35	246.65	0.90
BANKEX	40231.49	196.18	0.49
OIL GAS	17331.86	210.92	1.23
METAL	19033.48	-6.82	-0.04
INDIA VIX	15.57	-0.37	-2.32

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	1409	637	70
BSE	2298	1024	152

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	7471	6131	22
NSE CASH	80161	75580	6
NSE F&O	2624914	2677833	(2)

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	29.21	4.44	1.07
SENSEX	32.19	3.33	0.95

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	5644	4660	984
FII	6811	6998	(186)

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	2619.86	2104.86	515
Index Options	260340.70	257776.92	2564
Stock Futures	16071.00	16824.93	(754)
Stock Options	18175.48	18175.17	0

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.41	1.31
BANK NIFTY	0.68	0.69

SECURITIES BAN FOR TRADE IN F&O FOR 08-06-2021

IBULHSGFIN
PNB
SAIL
SUNTV

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.024	6.028	-0.07
USA	1.579	1.560	1.21

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	90.02	90.16	-0.16

CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
28 June - 21 USD-INR	72.99	-0.19	-0.26
28 June - 21 EUR-INR	88.77	0.10	0.12
28 June - 21 GBP-INR	103.36	0.04	0.04
28 June - 21 JPY- INR	66.75	0.29	0.44

KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1889.86	-0.46	-0.03
Silver	27.80	0.06	0.20
Crude-Oil	69.39	-0.23	-0.33
Brent-Crude	71.60	-0.29	-0.40

INDEX TREND ANALYSIS

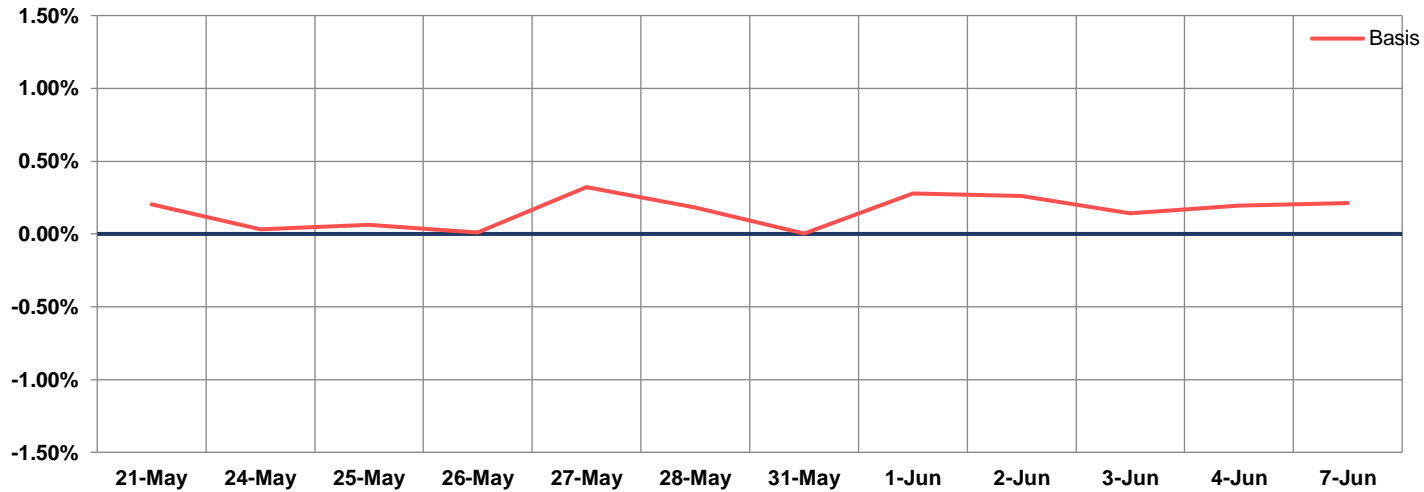
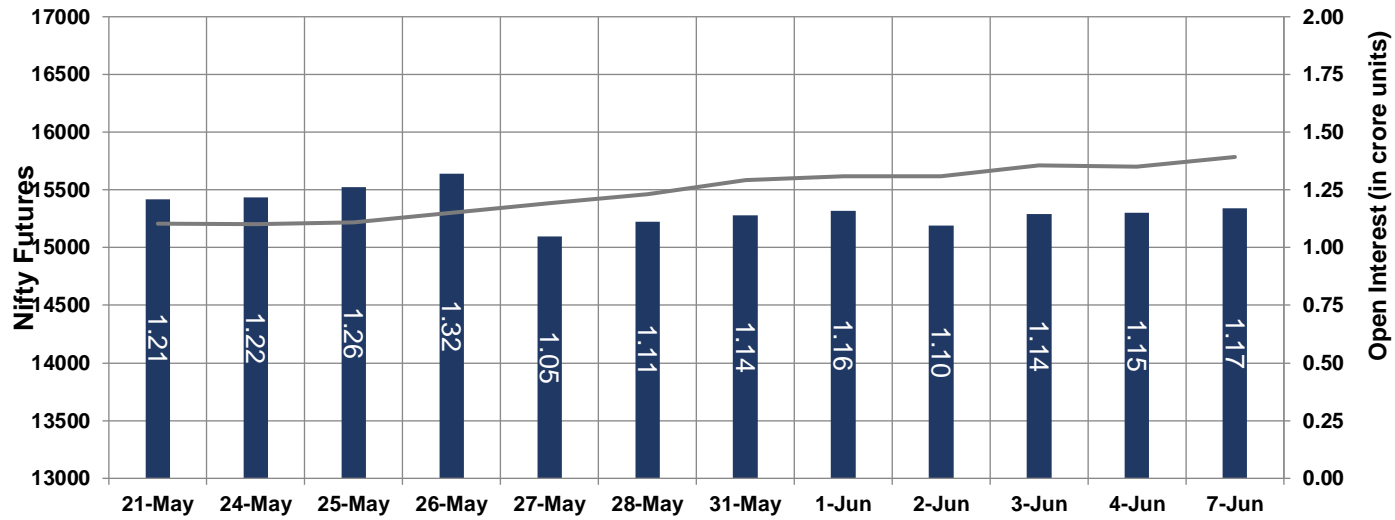
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	15752	15639	15695	15734	15791	15830	Buy	Buy	Buy
SENSEX	52329	51930	52129	52254	52453	52578	Buy	Buy	Buy
NIFTY FUTURES	15782	15663	15722	15765	15824	15867	Buy	Buy	Buy
BANK NIFTY	35444	35235	35340	35443	35547	35650	Buy	Buy	Buy
CNX IT	27296	26875	27086	27208	27418	27541	Buy	Buy	Buy
CNX MIDCAP	26881	26553	26717	26823	26987	27093	Buy	Buy	Buy
CNX SMALLCAP	9623	9494	9558	9595	9659	9696	Buy	Buy	Buy
INDIA VIX	15.57	14.22	14.89	15.42	16.09	16.62	Sell	Sell	Neutral

NIFTY TECHNICAL & INDICES LEVEL

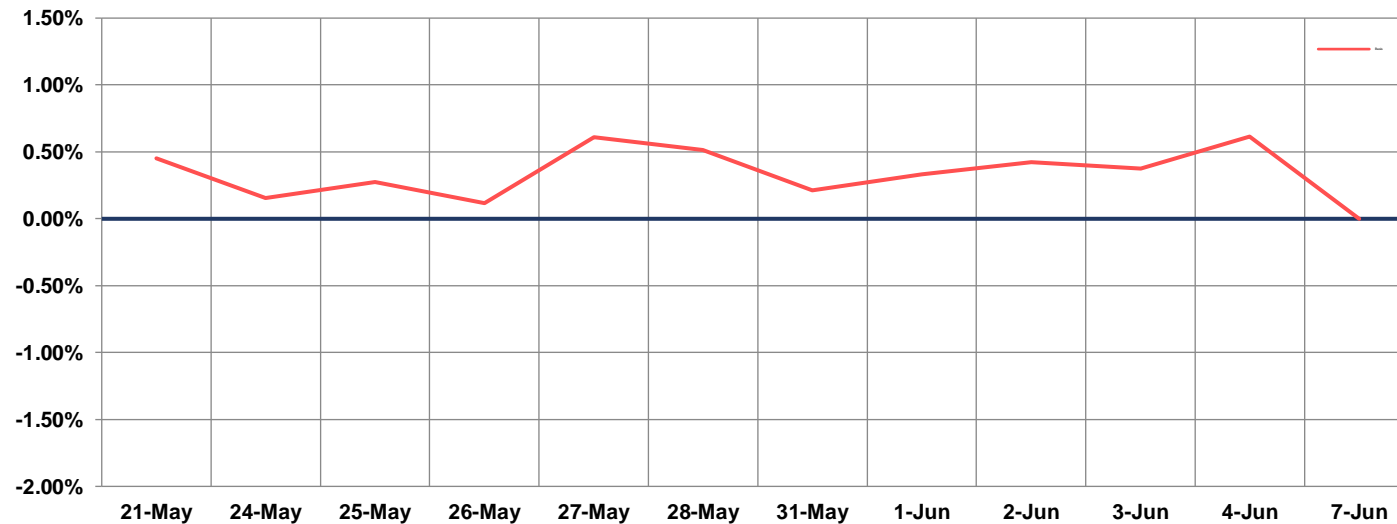
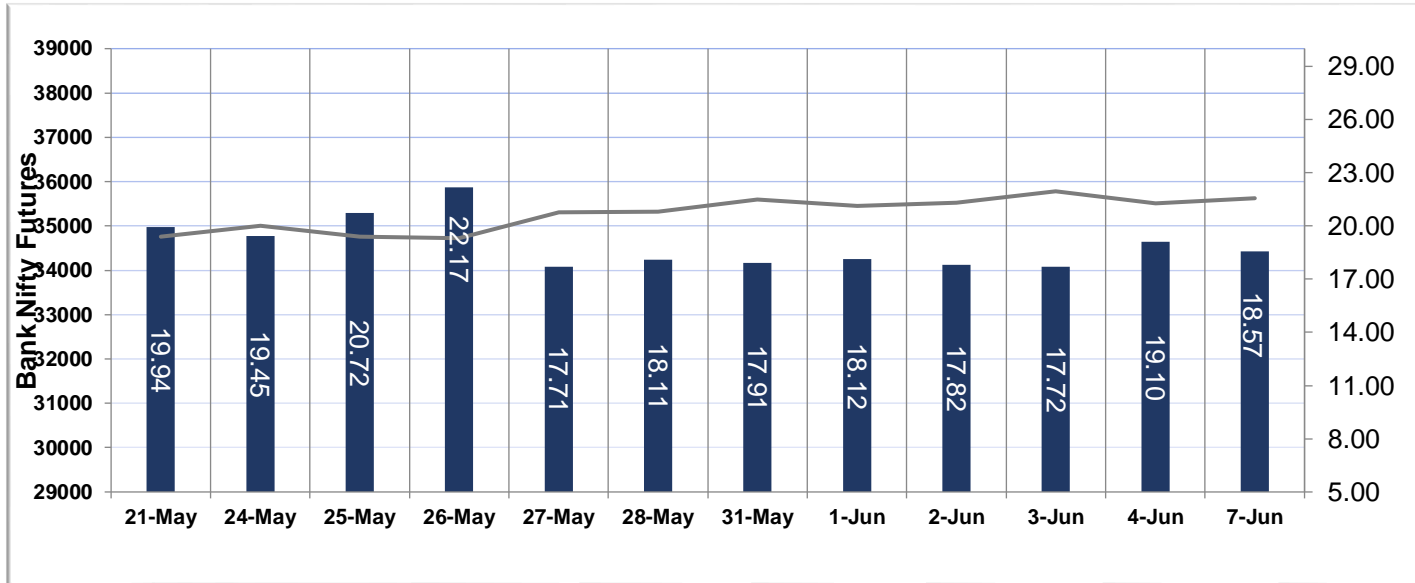


- Nifty Cash prices have settled at **15751.65** up by 0.52 percent from the previous close. On the upper side it has resistance of **15830** and **15960** levels, while lower side it has support of **15630** and **15550** levels. Intraday traders should be cautious and take position accordingly.

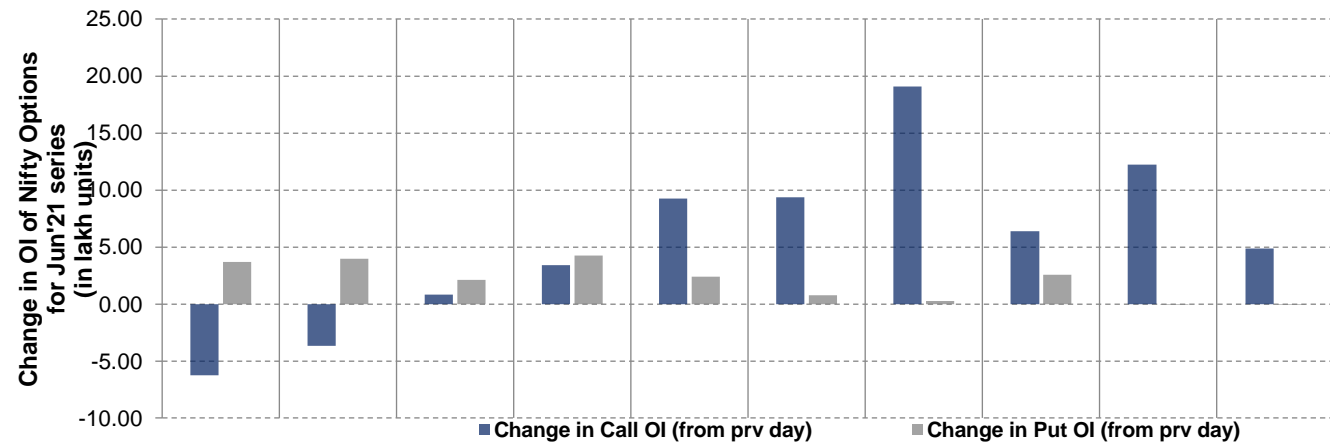
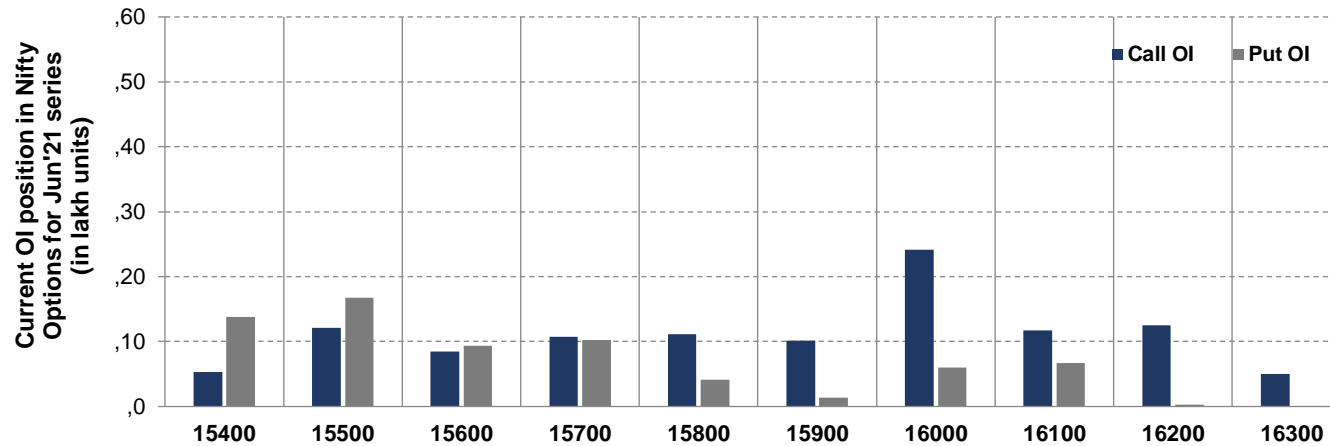
NIFTY FUTURES



BANK NIFTY FUTURES



NIFTY OPTIONS



- Among Nifty calls 16,000 SP from the June month expiry was the most active call with an addition of 1.91 million in open interests.
- Among Nifty puts 15,500 SP from the June month expiry was the most active put with an addition of 0.40 million in open interests.
- The maximum OI outstanding for Calls was at 16,000 SP (2.41mn) and that for Puts was at 15,500 SP (1.70mn)

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