

Morning Mantra

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

ISO 9001 : 2015 Certified



Table of Contents

Page No.	Particulars
1	Market Commentary
2	Market Summary and Numbers that matter
3	G-Sec Yields, Currency Futures, Dollar Index, Key Commodities Tracker & Index Trend Analysis
4	Nifty Technical
5	Nifty Futures
6	Bank Nifty Futures
7	Nifty Options
8	Disclaimer

MARKET COMMENTARY

Indian equity benchmarks ended flat with a negative bias on Tuesday. After a cautious start, key indices remained weak for the whole trading session, after domestic credit ratings agency Crisil has cut India's gross domestic product (GDP) growth forecast to 9.5 per cent for the current fiscal (FY22) as compared to 11 percent projected earlier due to the hit to private consumption and investments following the second wave of COVID-19. It joins other watchers who have cut their FY22 growth projections, with some pegging it as low as 7.9 percent. The economy had contracted by 7.3 percent in FY21.

Markets remained volatile during the trading session and finally ended the day in red terrain, as PHD Chamber of Commerce and Industry (PHDCCI) in its latest survey pointed out that businesses are struggling with rising cost of raw materials amid the second COVID wave as restrictions in many parts of the country have disrupted supply chains and also impacted the pace of economic recovery. In a survey, the industry body said that going ahead, a substantial stimulus to push the growth of the Indian economy impacted by the second wave of the pandemic would be crucial.

However, losses were limited, as Fitch Solutions held an optimistic outlook for the Indian consumer over 2021 with real growth in household spending forecast at 9.1 per cent year-on-year. This marks the start of a recovery from the negative 9.3 per cent year-on-year contraction over 2020. Besides, the government pledged to provide free COVID-19 vaccines to all adults, in an effort to rein in a pandemic that has killed hundreds of thousands. Also, daily COVID-19 cases in India have been on a downward trend since early May, with data from the health ministry on Tuesday showing 86,498 infections in the last 24 hours.

On the global front, European markets were trading mostly in green, as investors look ahead to euro zone growth and employment data for the first quarter, and remain focused on concerns over rising inflation. Asian markets ended mostly lower on Tuesday, after Japan's gross domestic product shrank an annualized 3.9 percent on year in the first quarter of 2021, the Cabinet Office said in Tuesday's final reading. That exceeded expectations for a decline of 4.8 percent following the 11.7 percent surge in the three months prior.

MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	52275.57	-52.94	-0.10
NIFTY	15740.10	-11.55	-0.07
MIDCAP	22773.33	85.28	0.38
SMLCAP	24826.64	229.27	0.93
BSEFMC	13313.68	104.16	0.79
AUTO	24339.67	140.99	0.58
POWER	2984.57	22.46	0.74
REALTY	2833.86	27.89	0.99
BSE IT	28096.55	390.20	1.41
BANKEX	3948.48	-385.01	-0.96
OIL GAS	17354.32	22.46	0.13
METAL	18770.53	-262.95	-1.38
INDIA VIX	15.22	-0.35	-2.23

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	1055	915	60
BSE	1802	1407	135

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	6263	7471	(16)
NSE CASH	78337	80161	(2)
NSE F&O	3389576	2624914	29

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	29.19	4.44	1.07
SENSEX	32.13	3.32	0.95

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	3936	5563	(1627)
FII	7647	6224	1423

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	2576.99	2644.37	(67)
Index Options	327796.60	326938.65	858
Stock Futures	13758.88	14282.80	(524)
Stock Options	17218.69	17439.71	(221)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.30	1.41
BANK NIFTY	0.61	0.68

SECURITIES BAN FOR TRADE IN F&O FOR 09-06-2021

IBULHSGFIN
NATIONALUM
PNB
SAIL
SUNTV

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.006	6.022	-0.27
USA	1.531	1.570	-2.46

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	90.10	89.95	0.17

CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
28 June - 21 USD-INR	73.02	0.045	0.062
28 June - 21 EUR-INR	88.93	0.175	0.197
28 June - 21 GBP-INR	103.27	-0.025	-0.024
28 June - 21 JPY- INR	66.72	0.002	0.003

KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1890.55	-8.42	-0.44
Silver	27.67	-0.21	-0.76
Crude-Oil	68.57	-0.66	-0.95
Brent-Crude	70.80	-0.70	-0.98

INDEX TREND ANALYSIS

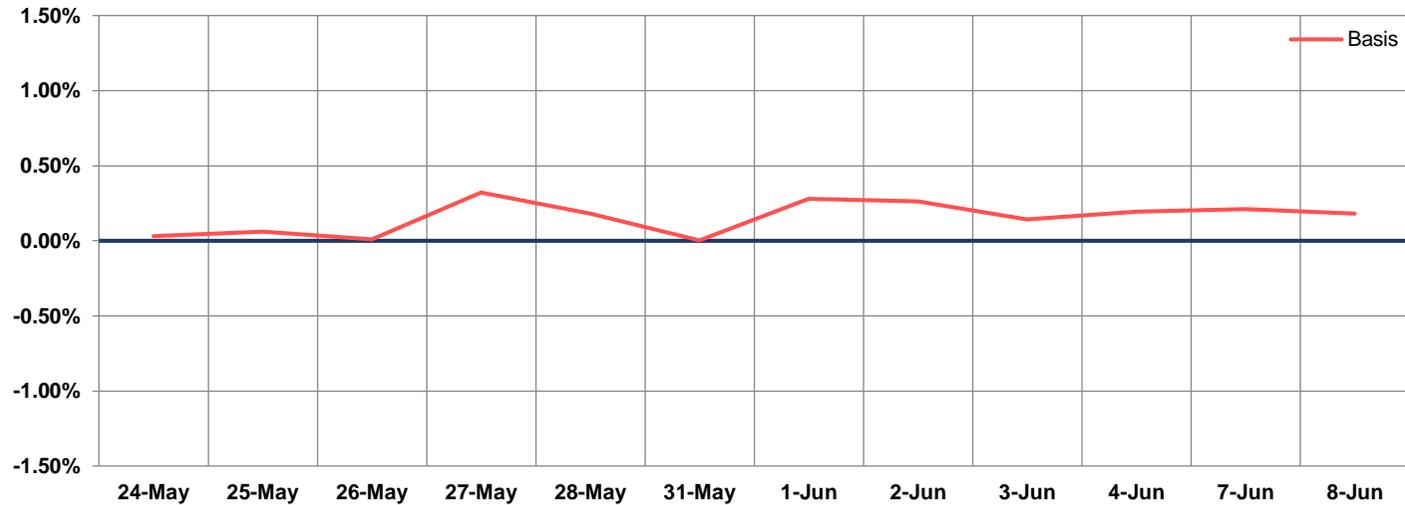
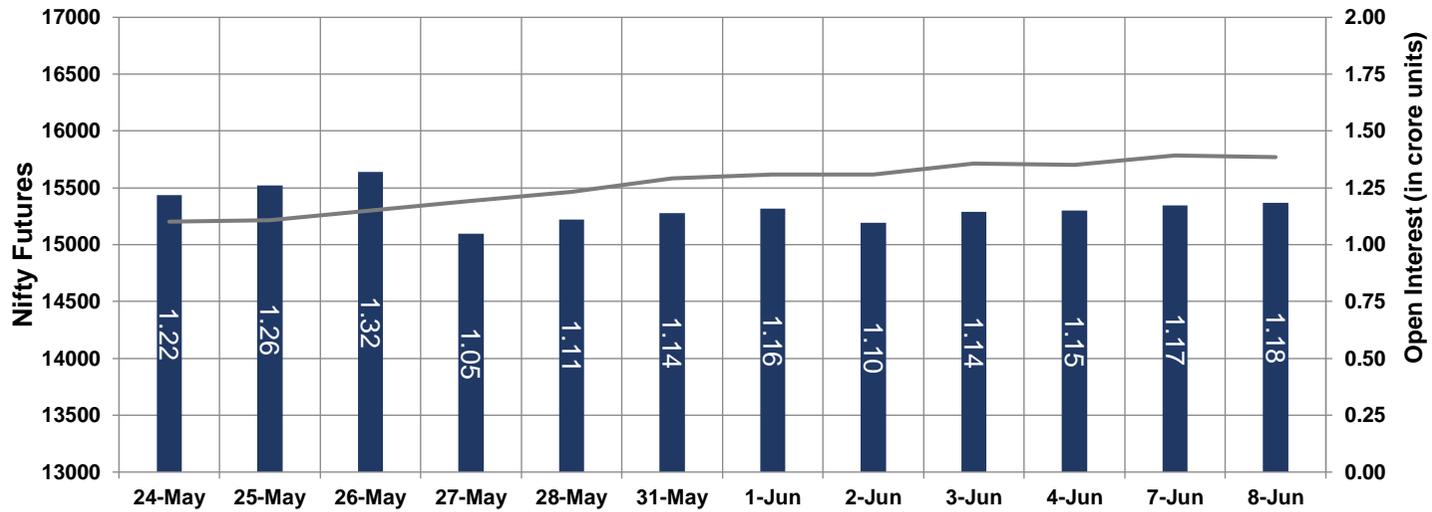
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	15740	15634	15687	15733	15786	15832	Buy	Buy	Buy
SENSEX	52276	51984	52130	52281	52427	52578	Buy	Buy	Buy
NIFTY FUTURES	15764	15663	15713	15752	15802	15841	Buy	Buy	Buy
BANK NIFTY	35085	34679	34882	35166	35369	35653	Neutral	Buy	Buy
CNX IT	27624	27222	27423	27578	27778	27933	Buy	Buy	Buy
CNX MIDCAP	27043	26577	26810	26951	27184	27324	Buy	Buy	Buy
CNX SMALLCAP	9674	9529	9601	9642	9714	9755	Buy	Buy	Buy
INDIA VIX	15.22	12.76	13.99	14.80	16.02	16.83	Sell	Sell	Neutral

NIFTY TECHNICAL & INDICES LEVEL

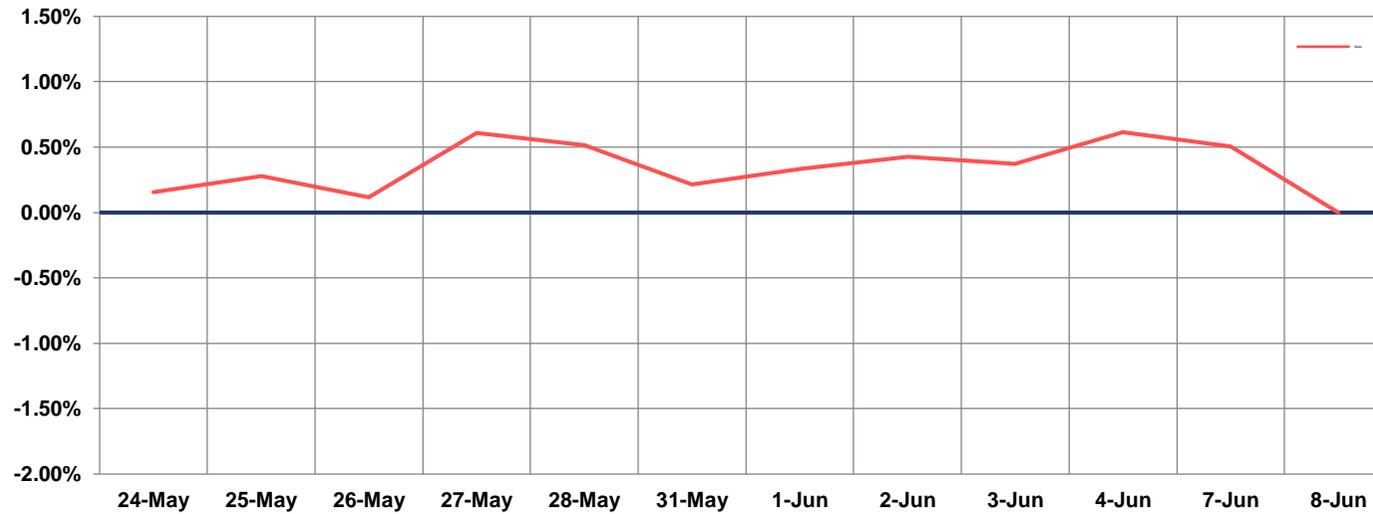
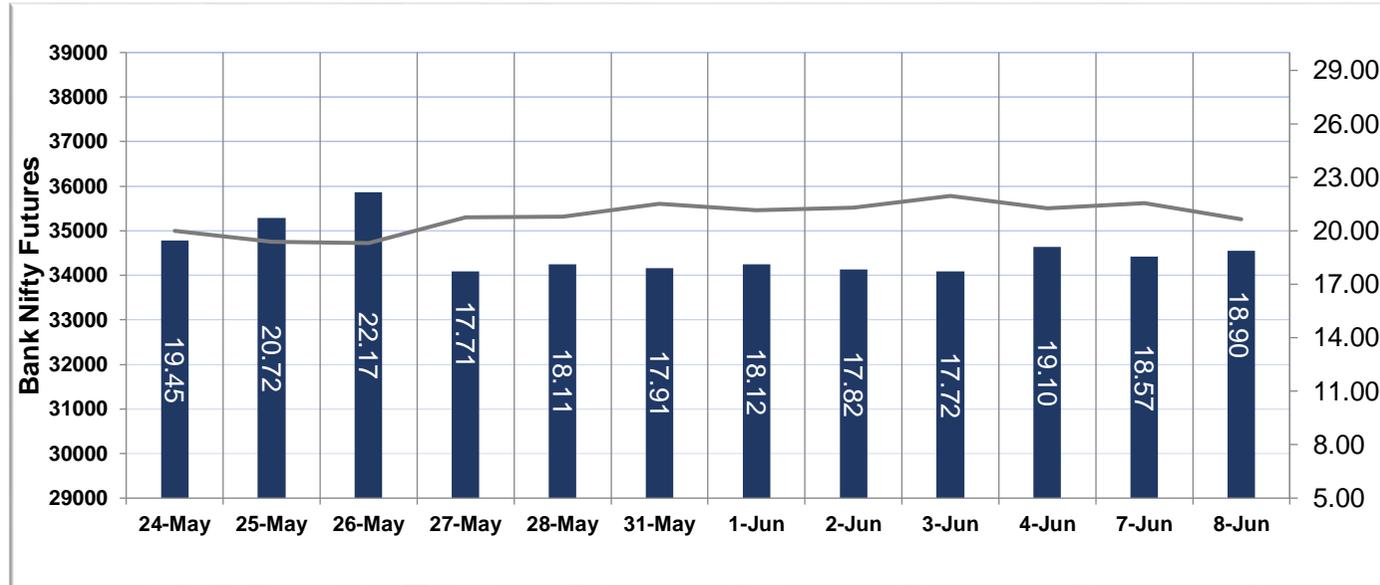


- Nifty Cash prices have settled at **15740.10** down by 0.07 percent from the previous close. On the upper side it has resistance of **15820** and **15960** levels, while lower side it has support of **15630** and **15570** levels. Intraday traders should be cautious and take position accordingly.

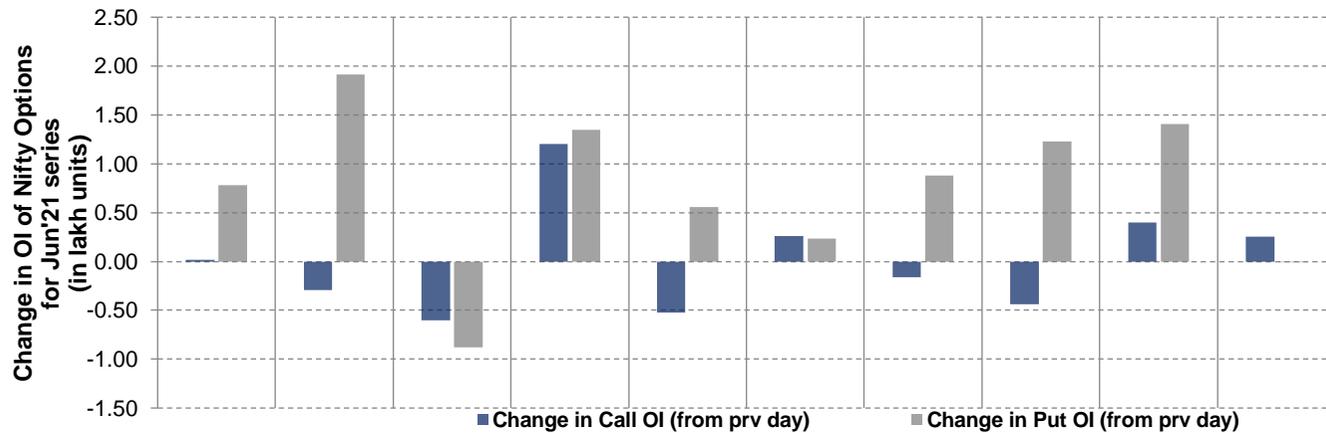
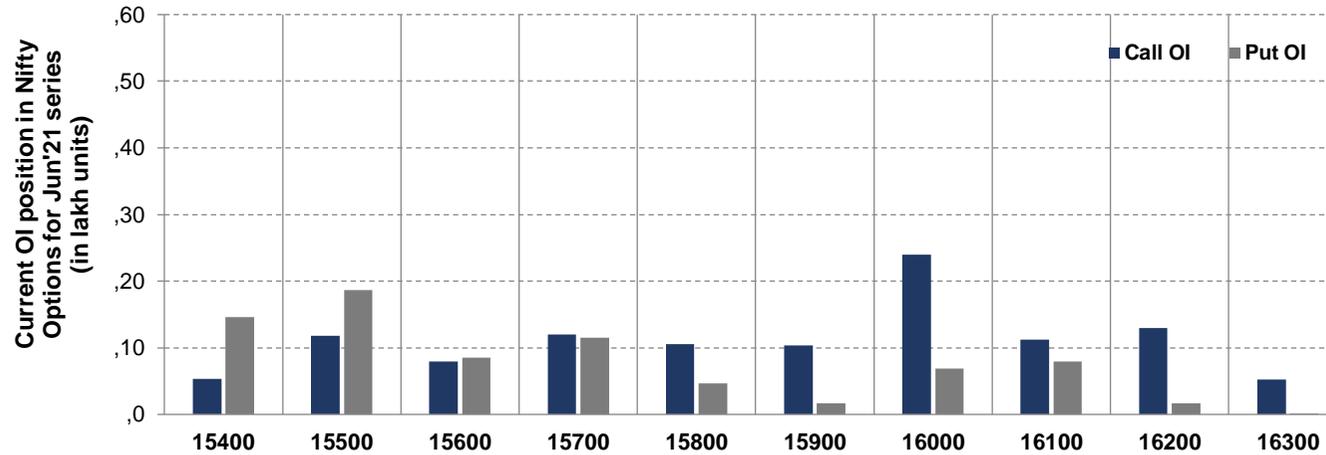
NIFTY FUTURES



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 15,500 SP from the June month expiry was the most active put with an addition of 0.20 million in open interests.
- The maximum OI outstanding for Calls was at 16,000 SP (2.4mn) and that for Puts was at 15,500 SP (1.90mn)

Disclaimer:

The Information provided by SMS or in newsletter or in any document has been prepared by Shah Investor's Home Ltd (SIHL). The Information provided by SMS or in newsletter does not constitute an offer or solicitation for the purchase or sale of any financial instrument or as an official confirmation of any transaction. The information contained herein is from publicly available data or other sources believed to be reliable, but we do not represent that it is accurate or complete and it should not be relied on as such. SIHL or any of its affiliates/ group companies shall not be in any way responsible for any loss or damage that may arise to any person from any error in the information contained in this report or SMS. This Information provided by SMS, reports or in newsletter is provided for assistance only and is not intended to be and must not alone be taken as the basis for an investment decision. The user assumes the entire risk of any use made of this information. Each recipient of this Information provided by SMS, report or in newsletter should make such investigation as it deems necessary to arrive at an independent evaluation of an investment in the securities of companies referred to in this information provided by SMS, report or in newsletter (including the merits and risks involved), and should consult his own advisors to determine the merits and risks of such investment. The investment discussed or views expressed may not be suitable for all investors. This information is strictly confidential and is being furnished to you solely for your information.

The information should not be reproduced or redistributed or passed on directly or indirectly in any form to any other person or published, copied, in whole or in part, for any purpose. The information provided by report or SMS is not directed or intended for distribution to, or use by, any person or entity who is a citizen or resident of or located in any locality, state, country or other jurisdiction, where such distribution, publication, availability or use would be contrary to law, regulation or which would subject SIHL and affiliates/ group companies to any registration or licensing requirements within such jurisdiction. The distribution of this Information provided by SMS or in newsletter in certain jurisdictions may be restricted by law, and persons in whose possession this Information provided by SMS or in newsletter comes, should inform themselves about and observe, any such restrictions. The information given or Information provided by SMS, report or in newsletter is as of the date of the issue date of report or the date on which SMS provided and there can be no assurance that future results or events will be consistent with this information. This information is subject to change without any prior notice. SIHL reserves the right to make modifications and alterations to this statement as may be required from time to time. However, SIHL is under no obligation to update or keep the information current.

Nevertheless, SIHL is committed to providing independent and transparent recommendation to its client and would be happy to provide any information in response to specific client queries. Neither SIHL nor any of its affiliates, group companies, directors, employees, agents or representatives shall be liable for any damages whether direct, indirect, special or consequential including lost revenue or lost profits that may arise from or in connection with the use of the information. Past performance is not necessarily a guide to future performance. The disclosures of interest statements incorporated in the Information provided by SMS, report or in newsletter are provided solely to enhance the transparency and should not be treated as endorsement of the views expressed in the report. The analyst for this report certifies that all of the views expressed in this report accurately reflect his or her personal views about the subject company or companies and its or their securities, and no part of his or her compensation was, is or will be, directly or indirectly related to specific recommendations or views expressed in this report.

About Us:

Shah Investor's Home Ltd (SIHL) is an ISO 9001:2015 Certified financial Services Company established in 1994 at Ahmadabad, Gujarat. Customer satisfaction is guaranteed through our diversified product portfolio, professional management and customer first attitude. SIHL was the first broking house in Gujarat with membership in National Securities Depository Ltd (NSDL) and was the first broking name providing services in NSE F&O in Ahmedabad. Today, SIHL ranks among the top most players in Gujarat in retail stock broking area with 45 branches, 350 franchisee across India and providing service to more than 1,25,000 clients.