

Morning Mantra

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

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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

Selling which emerged in last leg of trade dragged benchmarks lower on Wednesday as traders opted to book initial profits in risky assets. Markets started the day with marginal gains as sentiments remained positive with Trade Promotion Council of India's statement that the proposed free trade agreement between India and the European Union would benefit domestic exporters as EU is one of the biggest traditional markets for the country. Some support also came with a private survey stating that as India continues to maintain the momentum of its economic activities, hiring plans are likely to become stable during the July-September 2021 quarter mainly led by transportation and utilities and the services sector. Markets gained traction as risk sentiment improved on declining COVID-19 cases in India. An improved prospect of economic recovery led by sharp drop in daily caseload, ramping up vaccination process and phased withdrawal of restrictions imposed by states too aided sentiments. Traders were also energized as India's exports grew by 52.39 per cent to \$7.71 billion during the first week of this month on account of healthy growth in shipments in sectors including engineering, gems and jewellery and petroleum products.

However, markets took U-turn and entered into red terrain mainly by sell-off in public sector banks and auto stocks in the second half. Sentiments turned pessimistic as the World Bank slashed India's GDP forecast to 8.3 per cent for FY22, the fiscal year starting April 2021, as against its earlier estimate of 10.1 per cent. Besides, Union Finance Minister Nirmala Sitharaman is all set to chair a key meeting on June 11 to review infrastructure projects. Sentiments also dampened after India Ratings and Research warned that the burden of taxation, particularly indirect taxes, on households has worsened lately and is preventing them from spending more on consumption.

On the global front, European stocks were trading mostly in red, with investors holding on taking big bets ahead of a policy decision from the European Central Bank and US inflation reading later this week. Asian markets ended mostly in red ahead of the release of US inflation data that may give more clues about the Federal Reserve's next move. Back home, insurance industry stocks remained in focus as ICRA Ratings in a report said helped by higher growth in health and motor insurance segments, the general insurance industry is likely to clock a 7-9 per cent growth in gross direct premium income (GDPI) in the financial year 2021-22.

MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	51941.64	-333.93	-0.64
NIFTY	15635.35	-104.75	-0.67
MIDCAP	22610.68	-162.65	-0.71
SMLCAP	24591.61	-235.03	-0.95
BSEFMC	13276.45	-37.23	-0.28
AUTO	24014.98	-324.69	-1.33
POWER	3009.62	25.05	0.84
REALTY	2787.63	-46.23	-1.63
BSE IT	28047.53	-49.02	-0.17
BANKEK	39482.73	-363.75	-0.91
OIL GAS	17061.58	-292.14	-1.69
METAL	18634.12	-136.41	-0.73
INDIA VIX	14.75	-0.47	-3.10

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	702	1281	57
BSE	1387	1808	145

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	9219	6263	47
NSE CASH	88860	78337	13
NSE F&O	5940242	3389576	75

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	28.99	4.41	1.07
SENSEX	31.87	3.30	0.96

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	5896	6167	(272)
FII	7089	7935	(846)

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	4868.60	4332.05	537
Index Options	639065.54	646887.03	(7821)
Stock Futures	17080.24	17149.84	(70)
Stock Options	23888.48	24229.10	(341)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.12	1.30
BANK NIFTY	0.61	0.61

SECURITIES BAN FOR TRADE IN F&O FOR 10-06-2021

BHEL
CANBK
NATIONALUM
SAIL
SUNTV

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.016	6.006	0.17
USA	1.474	1.528	-3.54

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	90.08	90.07	0.01

CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
28 June - 21 USD-INR	73.10	0.07	0.10
28 June - 21 EUR-INR	89.12	0.17	0.19
28 June - 21 GBP-INR	103.57	0.28	0.27
28 June - 21 JPY- INR	66.82	0.08	0.12

KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	18991.47	-1.90	-0.10
Silver	27.87	0.25	0.89
Crude-Oil	70.03	-0.02	-0.03
Brent-Crude	72.30	0.05	0.07

INDEX TREND ANALYSIS

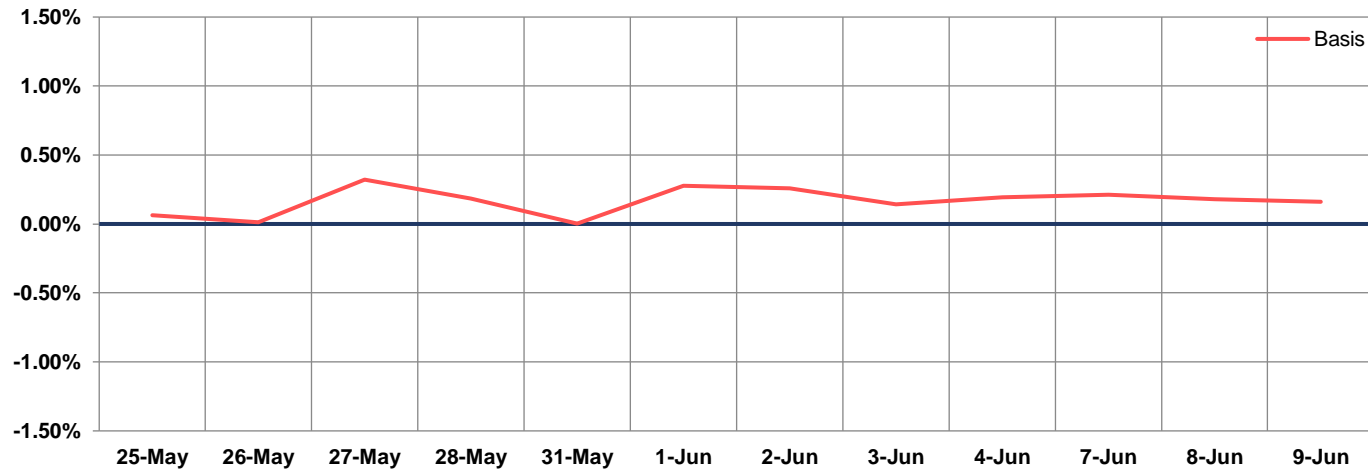
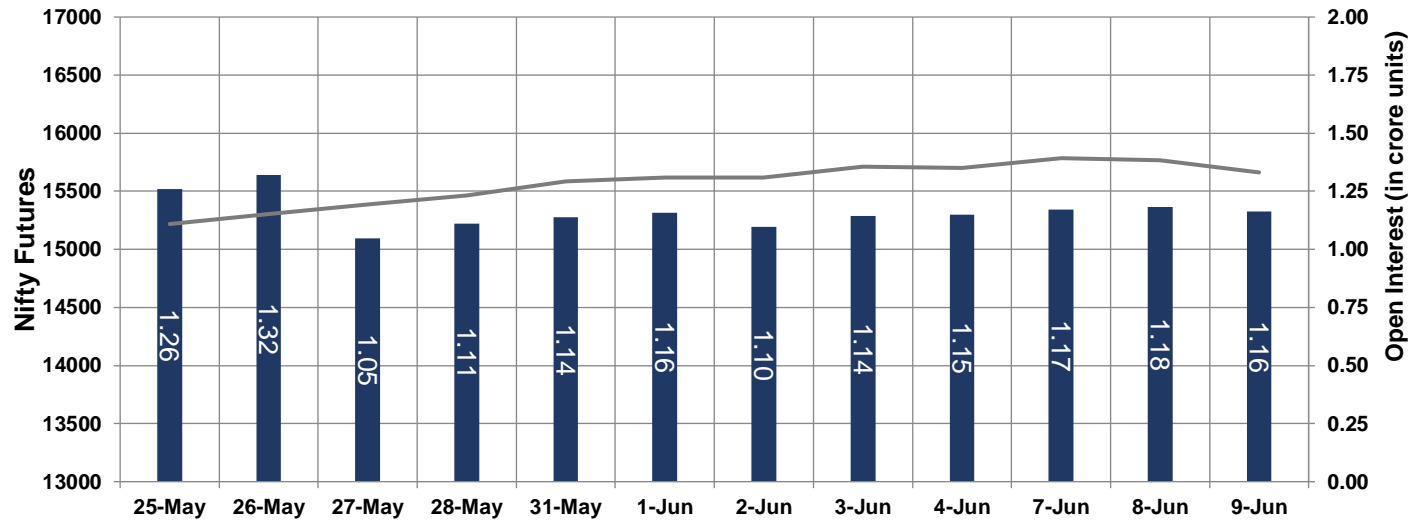
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	15635	15434	15535	15668	15768	15901	Neutral	Buy	Buy
SENSEX	51942	51305	51624	52035	52353	52765	Neutral	Buy	Buy
NIFTY FUTURES	15669	15472	15570	15693	15791	15913	Neutral	Buy	Buy
BANK NIFTY	34801	34187	34494	34948	35255	35709	Neutral	Buy	Buy
CNX IT	27539	27232	27386	27590	27743	27947	Buy	Buy	Buy
CNX MIDCAP	26848	26273	26560	26967	27254	27661	Buy	Buy	Buy
CNX SMALLCAP	9544	9346	9445	9600	9699	9854	Buy	Buy	Buy
INDIA VIX	14.75	10.34	12.55	14.14	16.35	17.94	Sell	Sell	Neutral

NIFTY TECHNICAL & INDICES LEVEL

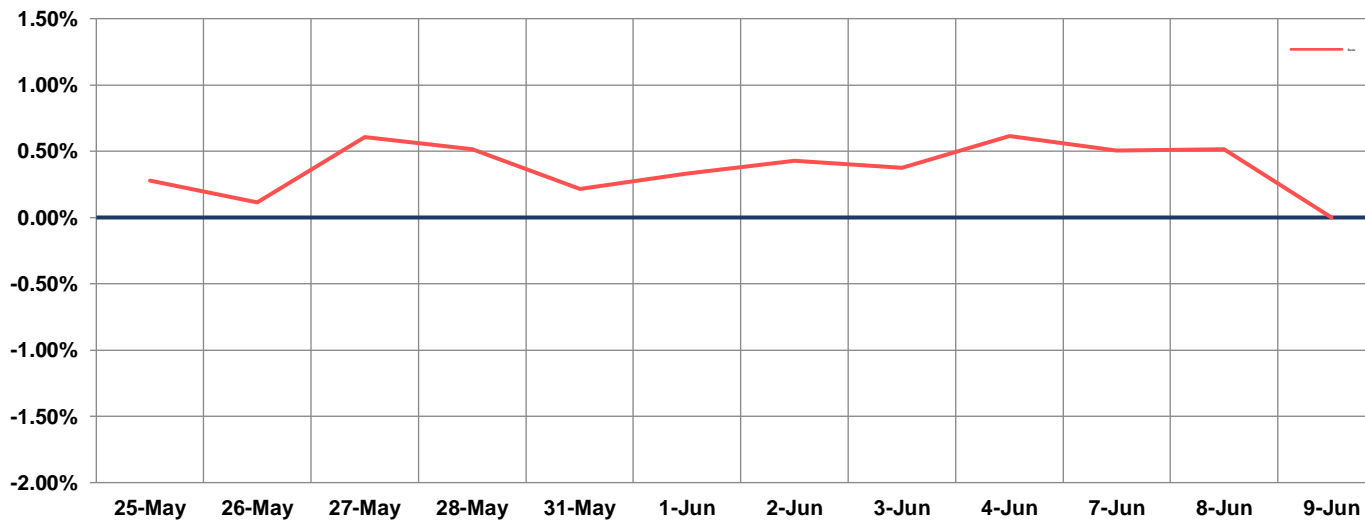
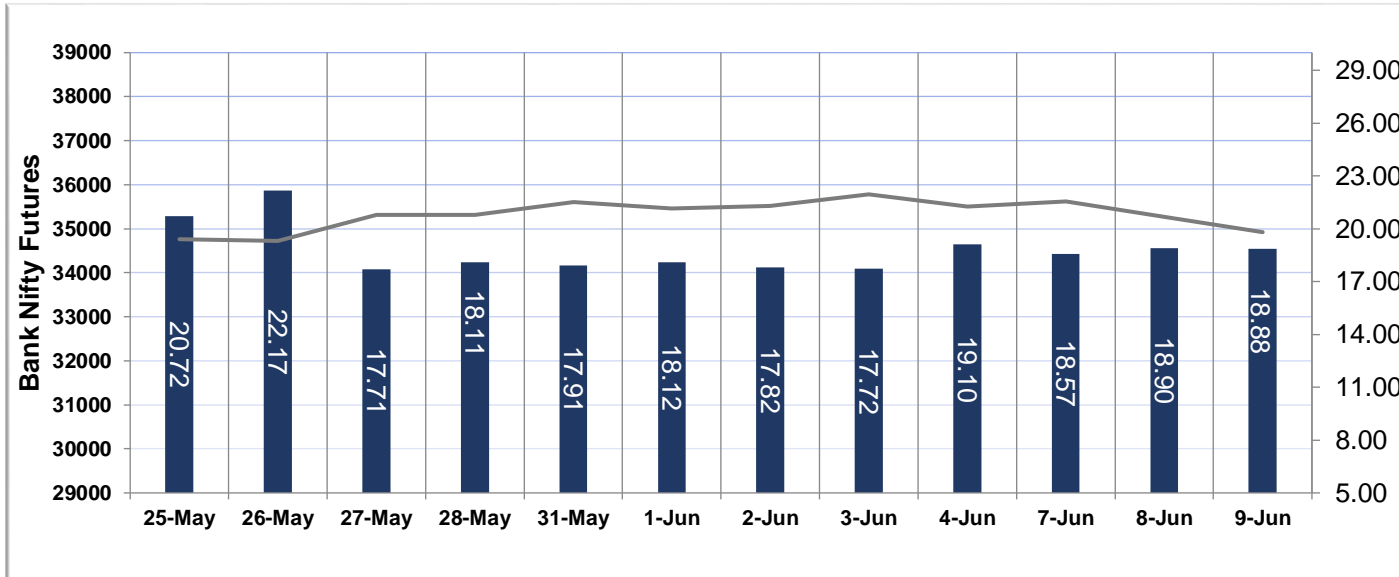


➤ Nifty Cash prices have settled at **15635.35** down by 0.67 percent from the previous close. On the upper side it has resistance of **15720** and **15810** levels, while lower side it has support of **15580** and **15430** levels. Intraday traders should be cautious and take position accordingly.

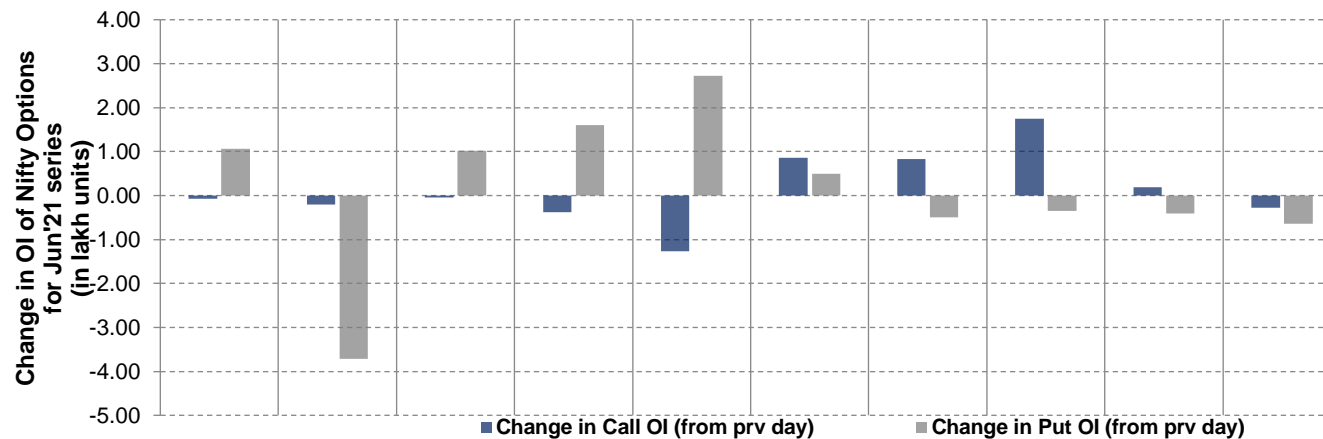
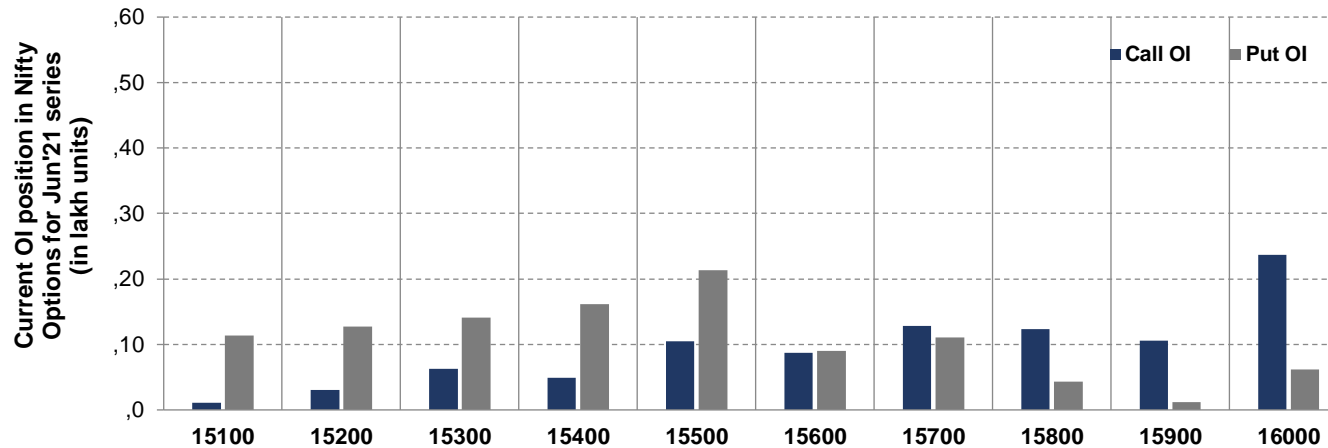
NIFTY FUTURES



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 0.03 million in open interests.
- Among Nifty puts 15,500 SP from the June month expiry was the most active put with an addition of 0.30 million in open interests.
- The maximum OI outstanding for Calls was at 16,000 SP (2.40mn) and that for Puts was at 15,500 SP (2.14mn)

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