

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

Indian equity benchmarks ended Thursday's trade in green terrain with frontline gauges settling above their crucial 52,300 (Sensex) and 15,700 (Nifty) levels. Markets started the session on optimistic note as traders took encouragement with Finance Ministry's report stating that faster vaccine coverage and frontloading of fiscal measures announced in this year's budget would be the major factors in boosting the investment and consumption cycles and, in turn, reviving the economy, as economic activities have slowed down amid the second wave of Covid-19 and lockdowns across states. Meanwhile, the Finance Ministry said it has released third monthly instalment of revenue deficit grant of Rs 9,871 crore to 17 states. With the release of this instalment, total Rs 29,613 crore has been released in the first three months of the current financial year as Post Devolution Revenue Deficit (PDRD) Grant to states.

Markets extended gains to end near intraday high levels as traders took some support with the Department of Economic Affairs (DEA) in its monthly report stating that the economic impact of the second wave COVID-19 is likely to be restricted to the first quarter of 2022. As per the DEA, rapid vaccination of India's population and the frontloading of the fiscal measures are the key to invigorating investment and consumption. Meanwhile, all-powerful GST Council, chaired by Finance Minister Nirmala Sitharaman, will meet on June 12 to decide on GST rate cut for COVID essentials and black fungus medicine.

On the global front, European counters were trading flat as traders await the European Central Bank (ECB) releasing its latest monetary policy decision, and giving its view on the eurozone recovery. Asian markets ended mostly in green ahead of US inflation data and a European Central Bank meeting, while traders also tracked China-US relations after Joe Biden dropped a Trump-era bid to ban TikTok and WeChat. Back home, insurance industry stocks remained in focus as non-life insurers reported an 11.35 per cent rise in gross direct premium income in May, over the same period last year, which was marred by a nationwide lockdown to curb the spread of the coronavirus. Sugar stocks remained in sweet spot as Crisil Rating report said the profitability of integrated sugar mills is likely to go up by 75-100 basis points (bps) this financial year due to high exports for the second consecutive season and increased supplies of ethanol for blending with petrol. Stocks related to auto sector remained buzzing as automobile retail sales crashed 55 percent in May compared to April as the COVID-19 lockdowns imposed across several states crippled vehicle offtake. Total vehicle retails (including tractors) during May fell to 535,855 units from 1.18 million units sold in April, as per data shared by the Federation of Automobile Dealer Association (FADA).

MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	52300.47	358.83	0.69
NIFTY	15737.75	102.40	0.65
MIDCAP	22895.06	284.38	1.26
SMLCAP	25015.89	424.28	1.73
BSEFMC	13337.10	60.65	0.46
AUTO	23988.69	-26.29	-0.11
POWER	3024.37	14.75	0.49
REALTY	2878.74	91.11	3.27
BSE IT	28282.50	234.97	0.84
BANKEX	39874.25	391.52	0.99
OIL GAS	17116.25	54.67	0.32
METAL	18822.55	188.43	1.01
INDIA VIX	15.00	0.25	1.69

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	1537	474	49
BSE	2456	727	150

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	5543	9219	(40)
NSE CASH	69991	88860	(21)
NSE F&O	8346719	5940242	41

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	29.18	4.44	1.15
SENSEX	32.10	3.32	0.96

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	4282	4857	(575)
FII	7448	6118	1330

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	2590.77	3535.04	(944)
Index Options	882249.78	883234.59	(985)
Stock Futures	14201.29	12739.75	1462
Stock Options	17792.28	17751.11	41

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.31	1.12
BANK NIFTY	0.86	0.61

SECURITIES BAN FOR TRADE IN F&O FOR 11-06-2021

BHEL
CANBK
IBULHSGFIN
NATIONALUM
SUNTV

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.020	6.016	0.07
USA	1.518	1.489	1.93

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	90.04	90.12	-0.09

CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
28 June - 21 USD-INR	73.20	0.10	0.14
28 June - 21 EUR-INR	89.14	0.02	0.03
28 June - 21 GBP-INR	103.20	-0.37	-0.36
28 June - 21 JPY- INR	66.86	0.06	0.09

KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1891.15	2.43	0.14
Silver	27.89	0.07	0.28
Crude-Oil	70.34	0.38	0.63
Brent-Crude	72.70	0.48	0.66

INDEX TREND ANALYSIS

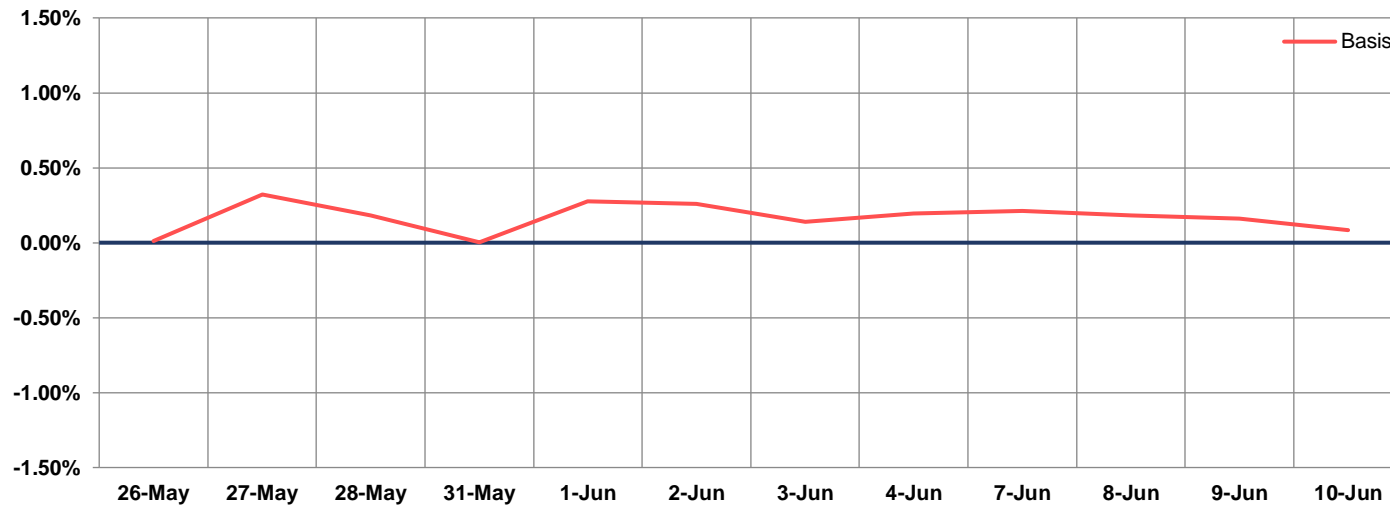
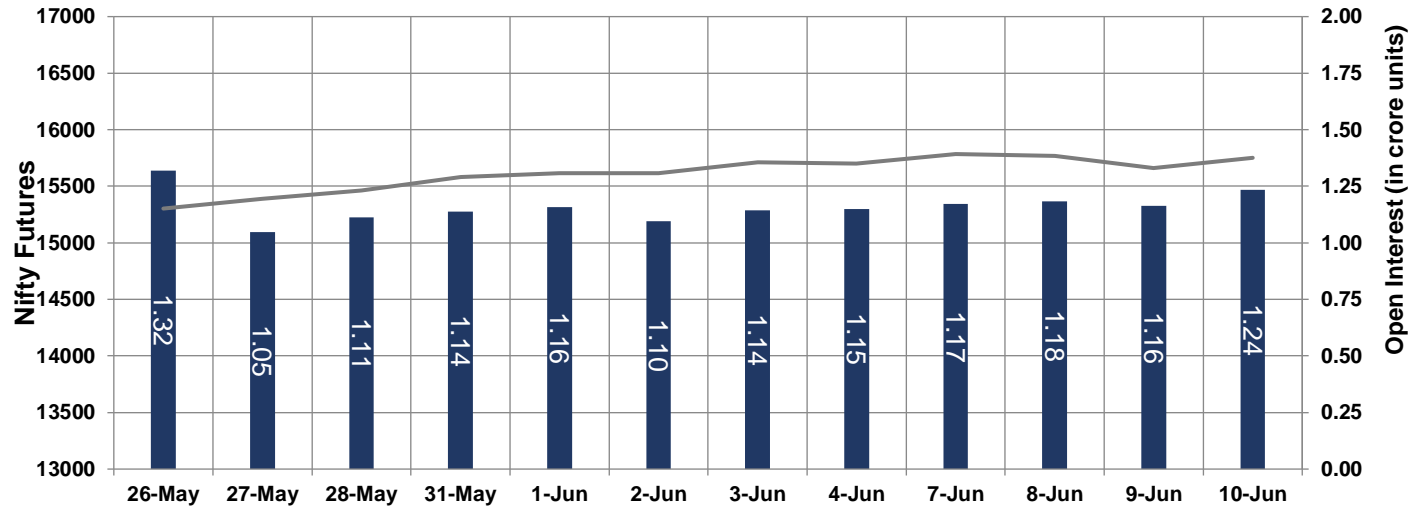
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	15738	15610	15674	15713	15777	15815	Buy	Buy	Buy
SENSEX	52300	51813	52057	52202	52445	52590	Buy	Buy	Buy
NIFTY FUTURES	15753	15615	15684	15726	15795	15837	Buy	Buy	Buy
BANK NIFTY	35131	34579	34855	35010	35286	35442	Buy	Buy	Buy
CNX IT	27798	27585	27691	27757	27863	27929	Buy	Buy	Buy
CNX MIDCAP	27268	26924	27096	27195	27367	27466	Buy	Buy	Buy
CNX SMALLCAP	9698	9569	9633	9670	9734	9770	Buy	Buy	Buy
INDIA VIX	15.00	13.77	14.38	14.79	15.41	15.81	Sell	Sell	Neutral

NIFTY TECHNICAL & INDICES LEVEL

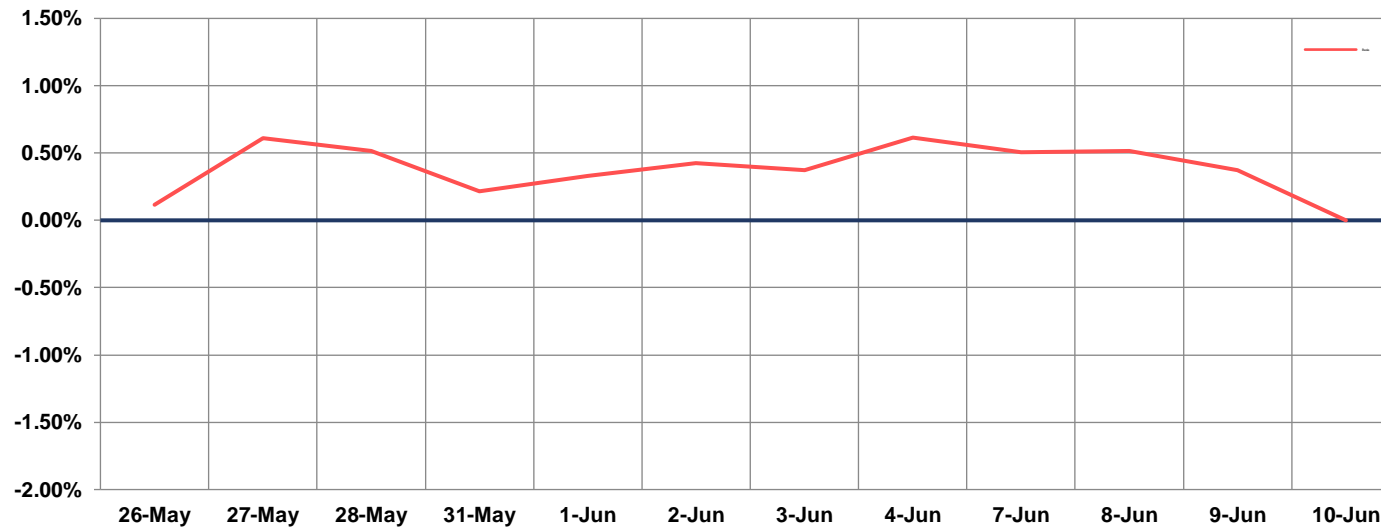
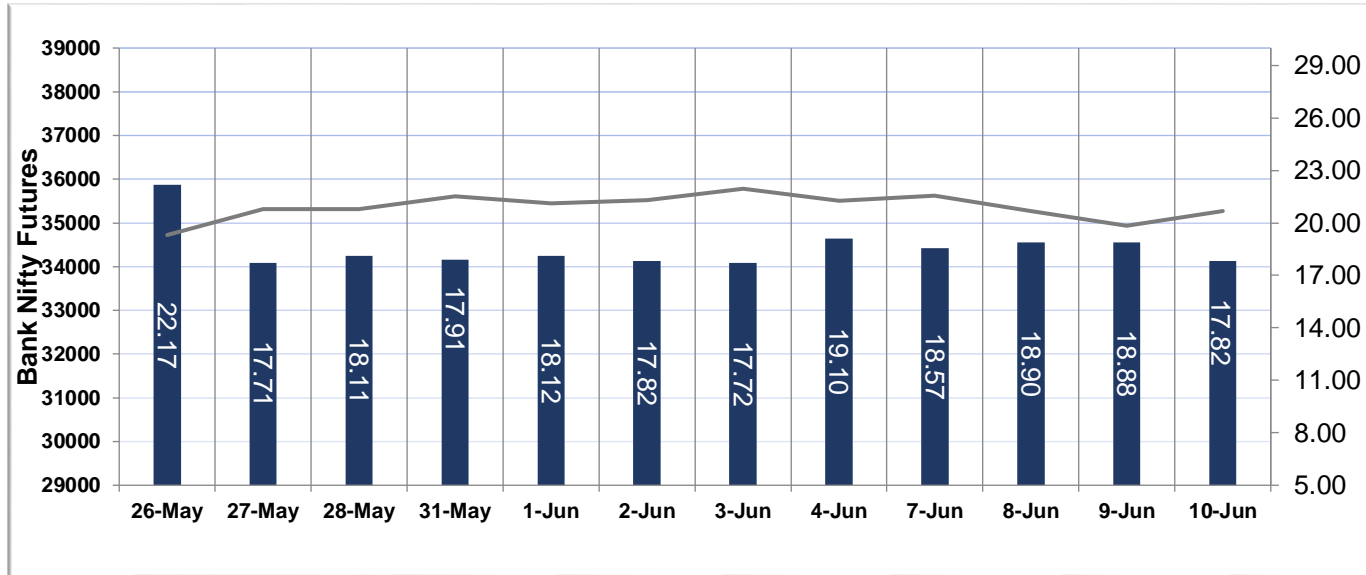


➤ Nifty Cash prices have settled at **15737.75** up by 0.65 percent from the previous close. On the upper side it has resistance of **15850** and **15935** levels, while lower side it has support of **15670** and **15580** levels. Intraday traders should be cautious and take position accordingly.

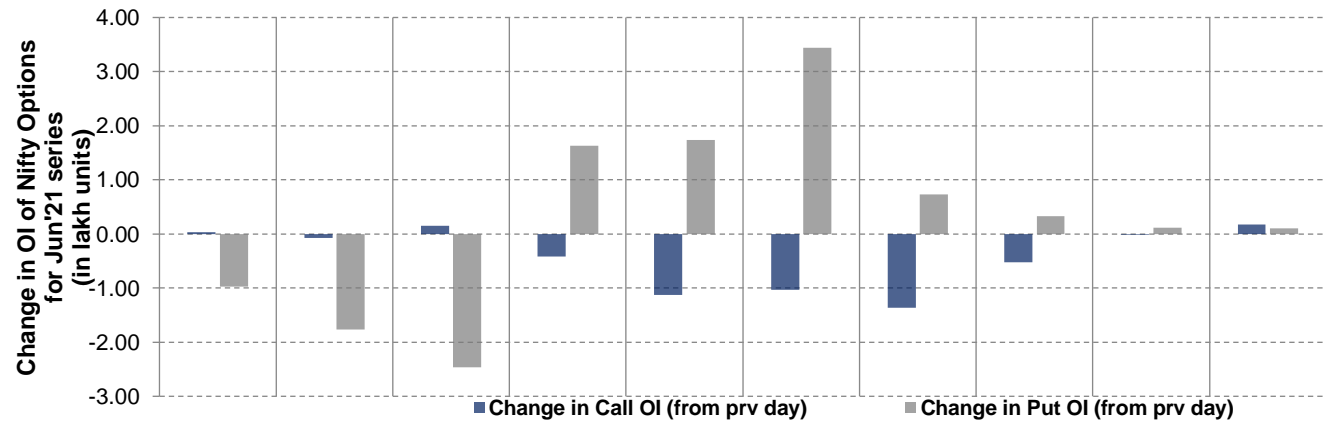
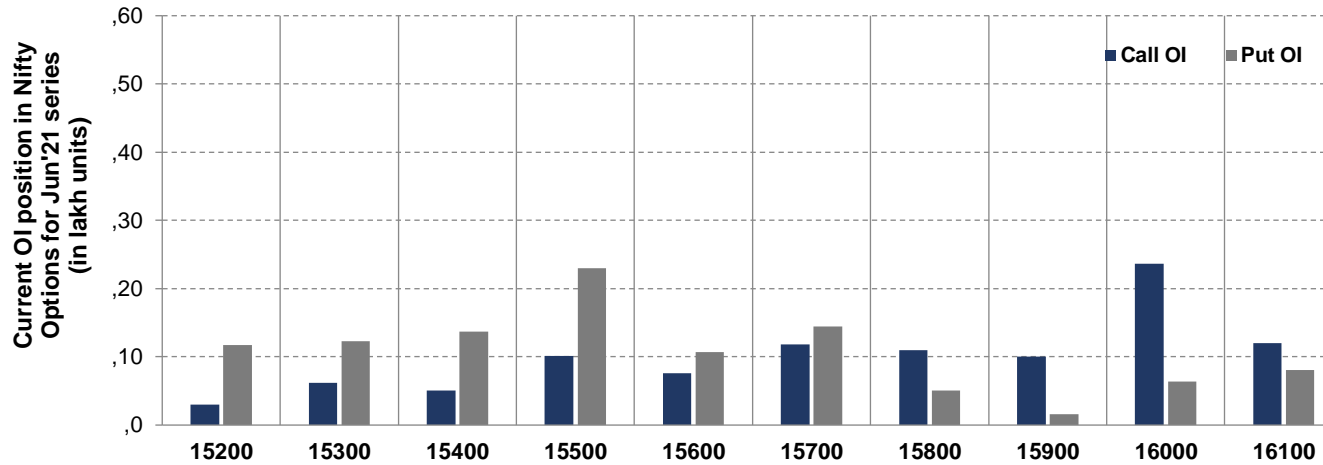
NIFTY FUTURES



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 0.002 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 (2.40mn) and that for Puts was at 15,500 SP (2.30mn)

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