

# Morning Mantra

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

ISO 9001 : 2015 Certified



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## MARKET COMMENTARY

Indian equity benchmarks ended in green on Friday. After a positive start, key indices remained higher for the whole trading session, as a fall in the number of Covid cases in the country supported the sentiment on D-Street. Fresh daily cases remained below the 1 lakh mark for the fourth day straight as India reported 91,000 cases in the last 24 hours. The steady decline in cases is igniting hopes of the further reopening of the economy, providing support to market mood. Traders took encouragement with Commerce Secretary Anup Wadhawan's statement that India's export of agricultural and allied products in 2020-21 grew by 17.34 per cent to \$41.25 billion, and this growth momentum is expected to be sustained in the current fiscal as well.

Finally, markets ended higher, as the Centre for Monitoring Indian Economy (CMIE) in its report stated that the gradual unlocking process across India is likely to restore about two-thirds of the 25 million non-farm jobs lost following the lockdown in May. That would be 17 million out of the 25 million non-farm jobs lost during the month. Traders also found some solace with credit rating agency Icra Ratings' report that the country's gross domestic product (GDP) will grow at 8.5 per cent in FY2021-22, with decline in number of fresh COVID-19 cases and easing of restrictions. It expects the gross value added (GVA) at basic prices (at constant 2011-12 prices) to grow at 7.3 per cent in FY2022.

On the global front, European markets were trading higher buoyed by hopes that major central banks will remain accommodative despite signs of rising inflation, while a rally in miners boosted UK shares. Asian markets ended mostly lower on Friday, after export prices in South Korea were up 12.3 percent on year in May, the Bank of Korea said on Friday - up from 11.1 in April. Individually, prices for exports of agricultural goods fell 2.4 percent on year and manufacturing products climbed 12.4 percent. Import prices jumped an annual 13.8 percent on year in April, slowing from the 15.3 percent gain in the previous month.

## MARKET SUMMARY

| Domestic Indices | Close    | Points  | % Change |
|------------------|----------|---------|----------|
| SENSEX           | 52474.76 | 174.29  | 0.33     |
| NIFTY            | 15799.35 | 61.60   | 0.39     |
| MIDCAP           | 22927.83 | 32.77   | 0.14     |
| SMLCAP           | 25116.30 | 100.41  | 0.40     |
| BSEFMC           | 13297.63 | -39.47  | -0.30    |
| AUTO             | 24108.66 | 119.97  | 0.50     |
| POWER            | 3024.96  | 0.59    | 0.02     |
| REALTY           | 2848.19  | -30.55  | -1.06    |
| BSE IT           | 28697.07 | 414.57  | 1.47     |
| BANKEX           | 39731.36 | -142.89 | -0.36    |
| OIL GAS          | 17135.31 | 19.06   | 0.11     |
| METAL            | 19425.94 | 603.39  | 3.21     |
| INDIA VIX        | 14.10    | -0.90   | -5.98    |

## ADVANCE-DECLINE

| Index | Advance | Decline | Unchanged |
|-------|---------|---------|-----------|
| NSE   | 1038    | 960     | 51        |
| BSE   | 1731    | 1465    | 130       |

## MARKET TURNOVER (₹ in Crs)

| Segment  | Current | Previous | Net % |
|----------|---------|----------|-------|
| BSE CASH | 5964    | 5543     | 8     |
| NSE CASH | 71973   | 69991    | 3     |
| NSE F&O  | 2323418 | 8346719  | (72)  |

## KEY INDICES RATIOS

| INDEX  | P/E   | P/B  | Dividend Yield |
|--------|-------|------|----------------|
| NIFTY  | 29.30 | 4.46 | 1.18           |
| SENSEX | 32.22 | 3.3  | 0.95           |

## FII & DII - CAPITAL MARKETS (₹ in Crs)

| FII-DII* | Buy  | Sell | Net |
|----------|------|------|-----|
| DII      | 5213 | 4546 | 666 |
| FII      | 5161 | 5143 | 19  |

Note: FII & DII Figures are provisional

## FII DERIVATIVES (₹ in Crs)

| FII           | Buy       | Sell      | Net   |
|---------------|-----------|-----------|-------|
| Index Futures | 2565.58   | 2687.28   | (122) |
| Index Options | 213238.33 | 213893.94 | (656) |
| Stock Futures | 12892.54  | 12708.59  | 184   |
| Stock Options | 21062.37  | 21134.84  | (72)  |

## PUT-CALL RATIO

| Index      | Current | Previous |
|------------|---------|----------|
| NIFTY      | 1.35    | 1.31     |
| BANK NIFTY | 0.74    | 0.86     |

## SECURITIES BAN FOR TRADE IN F&O FOR 14-06-2021

|            |
|------------|
| BHEL       |
| CANBK      |
| IBULHSGFIN |
| NATIONALUM |
| SUNTV      |

## 10-YEAR GOVERNMENT SECURITIES YIELD

| Country | Current | Previous | % Chg |
|---------|---------|----------|-------|
| INDIA   | 6.006   | 6.019    | -0.22 |
| USA     | 1.454   | 1.459    | -0.38 |

## DOLLAR INDEX

| Dollar Index | Current | Previous | % Chg |
|--------------|---------|----------|-------|
| DXY          | 90.56   | 90.09    | 0.49  |

## CURRENCY FUTURES

| Expiry                | Close  | Chg Point | % Chg  |
|-----------------------|--------|-----------|--------|
| 28 June - 21 USD-INR  | 73.20  | 0.002     | 0.003  |
| 28 June - 21 EUR-INR  | 88.89  | -0.227    | -0.255 |
| 28 June - 21 GBP-INR  | 103.59 | 0.428     | 0.414  |
| 28 June - 21 JPY- INR | 66.87  | -0.070    | -0.104 |

## KEY COMMODITIES TRACKER

| Commodity   | Current | Chg Point | % Chg |
|-------------|---------|-----------|-------|
| Gold        | 1880.71 | -17.65    | -0.93 |
| Silver      | 28.05   | 0.08      | 0.28  |
| Crude-Oil   | 70.77   | 0.48      | 0.68  |
| Brent-Crude | 72.70   | 0.17      | 0.25  |

## INDEX TREND ANALYSIS

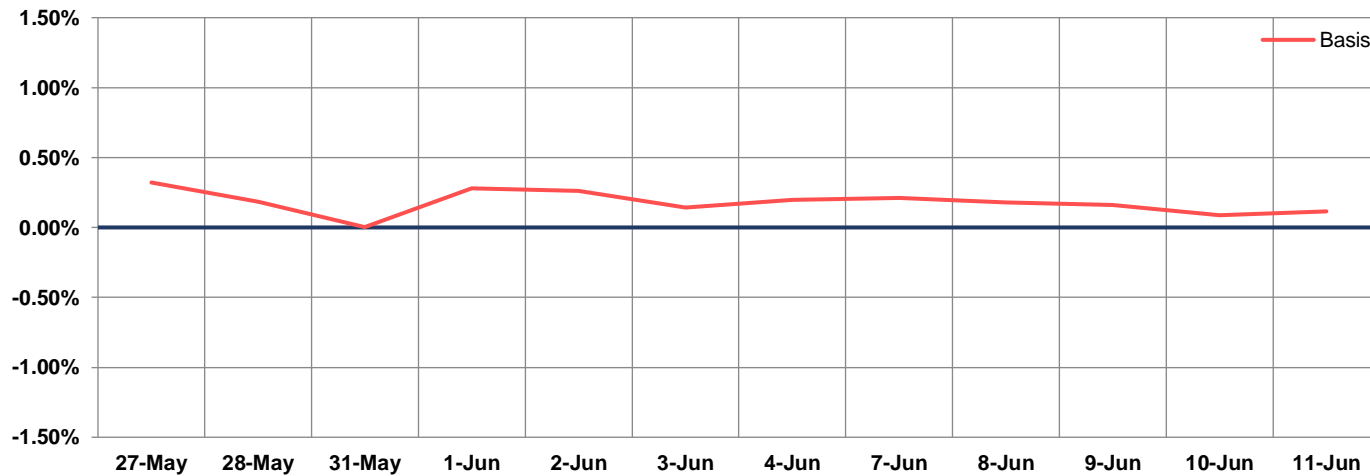
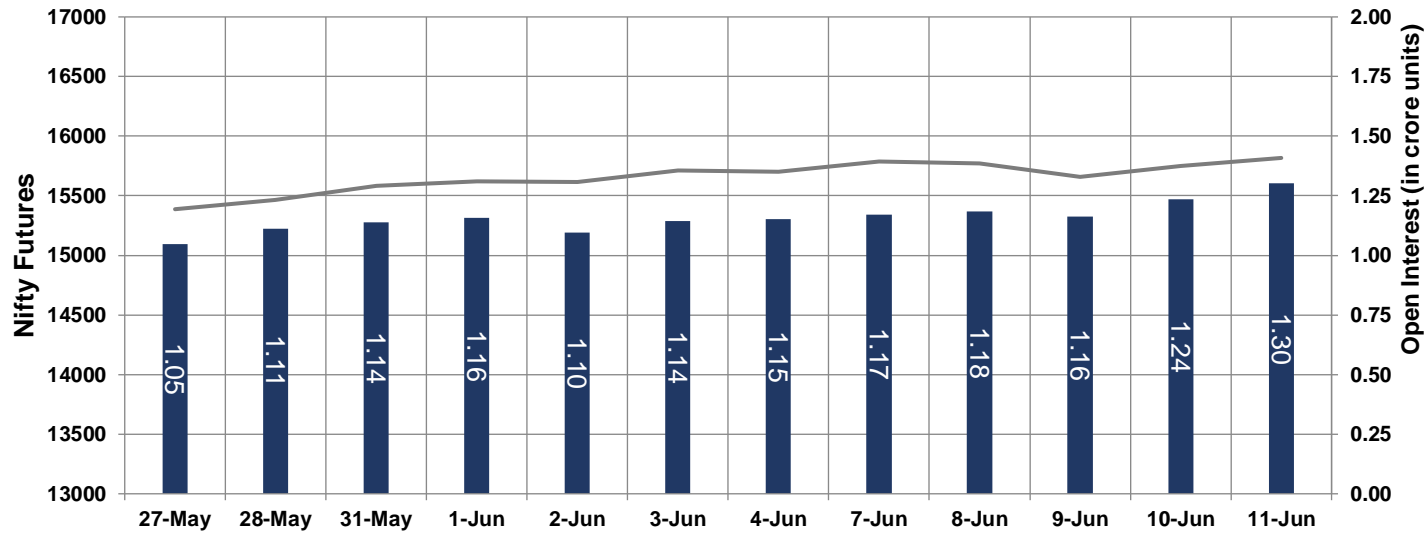
| INDEX         | CLOSE | S2    | S1    | PIVOT | R1    | R2    | DAILY   | WEEKLY | MONTHLY |
|---------------|-------|-------|-------|-------|-------|-------|---------|--------|---------|
| NIFTY         | 15799 | 15709 | 15754 | 15795 | 15840 | 15881 | Buy     | Buy    | Buy     |
| SENSEX        | 52475 | 52249 | 52362 | 52502 | 52615 | 52754 | Buy     | Buy    | Buy     |
| NIFTY FUTURES | 15821 | 15717 | 15769 | 15812 | 15865 | 15908 | Buy     | Buy    | Buy     |
| BANK NIFTY    | 35047 | 34642 | 34844 | 35094 | 35297 | 35547 | Neutral | Buy    | Buy     |
| CNX IT        | 28218 | 27602 | 27910 | 28129 | 28437 | 28656 | Buy     | Buy    | Buy     |
| CNX MIDCAP    | 27329 | 27070 | 27200 | 27337 | 27467 | 27604 | Buy     | Buy    | Buy     |
| CNX SMALLCAP  | 9750  | 9672  | 9711  | 9751  | 9789  | 9829  | Buy     | Buy    | Buy     |
| INDIA VIX     | 14.10 | 13.29 | 13.69 | 14.35 | 14.75 | 15.41 | Sell    | Sell   | Neutral |

## NIFTY TECHNICAL & INDICES LEVEL

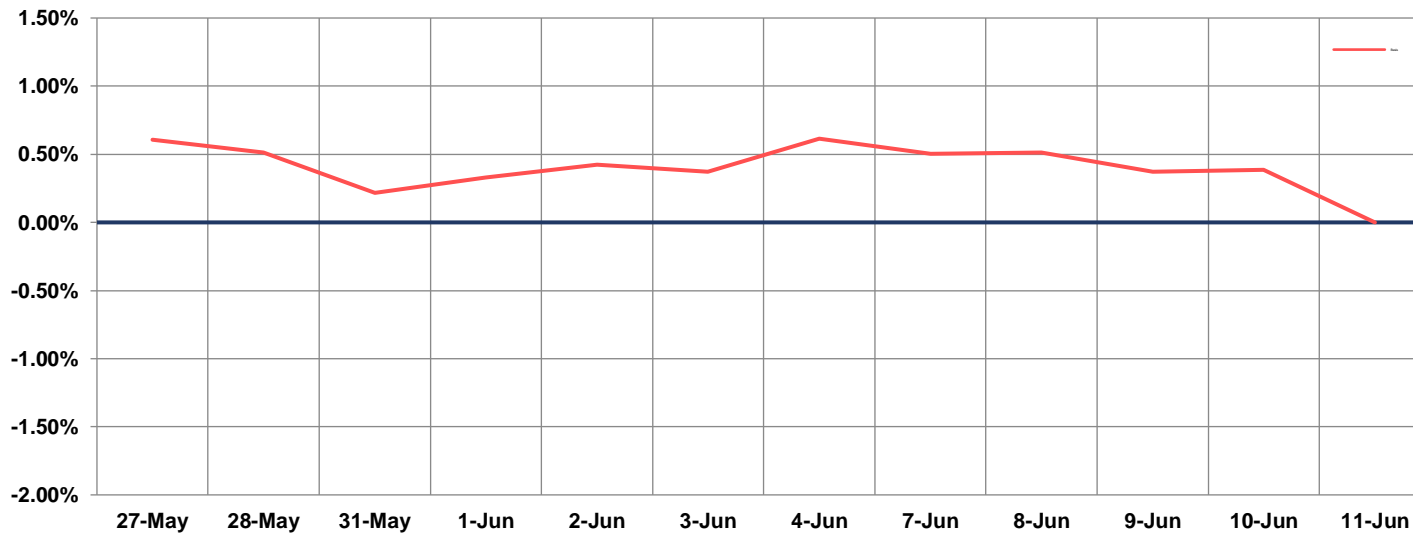
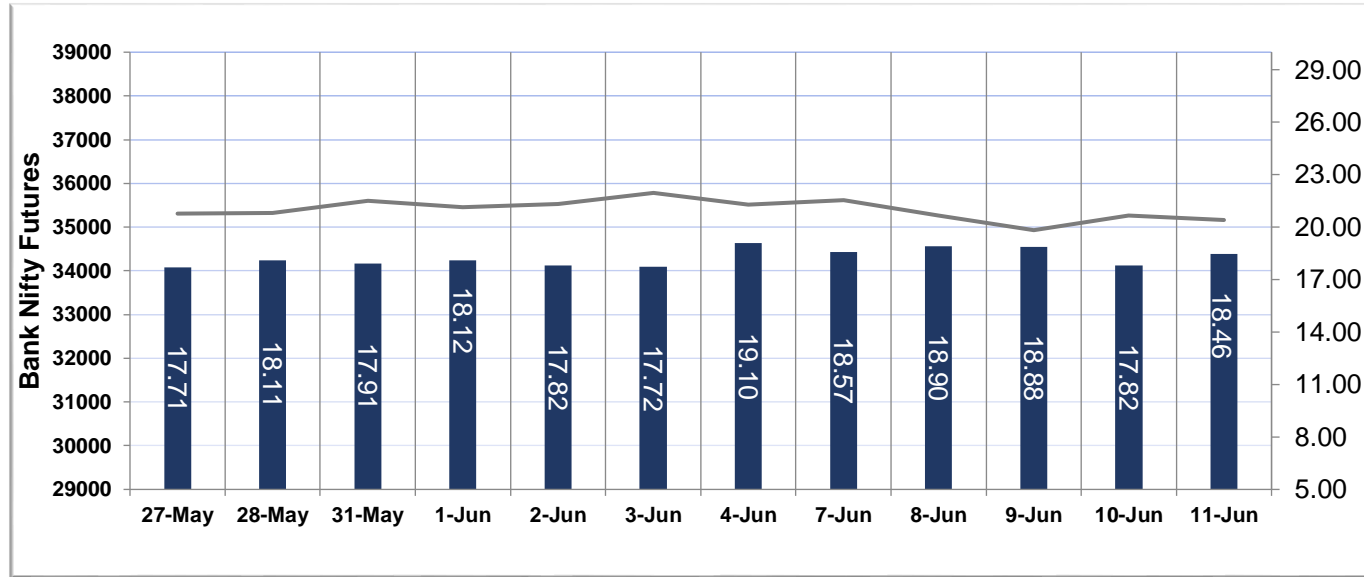


- Nifty Cash prices have settled at **15799.35** up by 0.39 percent from the previous close. On the upper side it has resistance of **15920** and **16040** levels, while lower side it has support of **15670** and **15580** levels. Intraday traders should be cautious and take position accordingly.

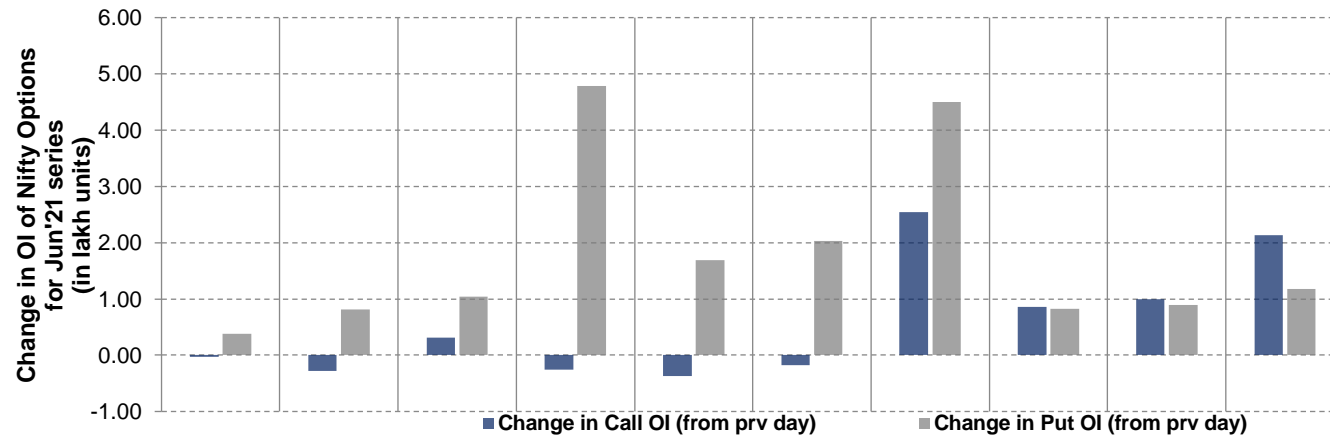
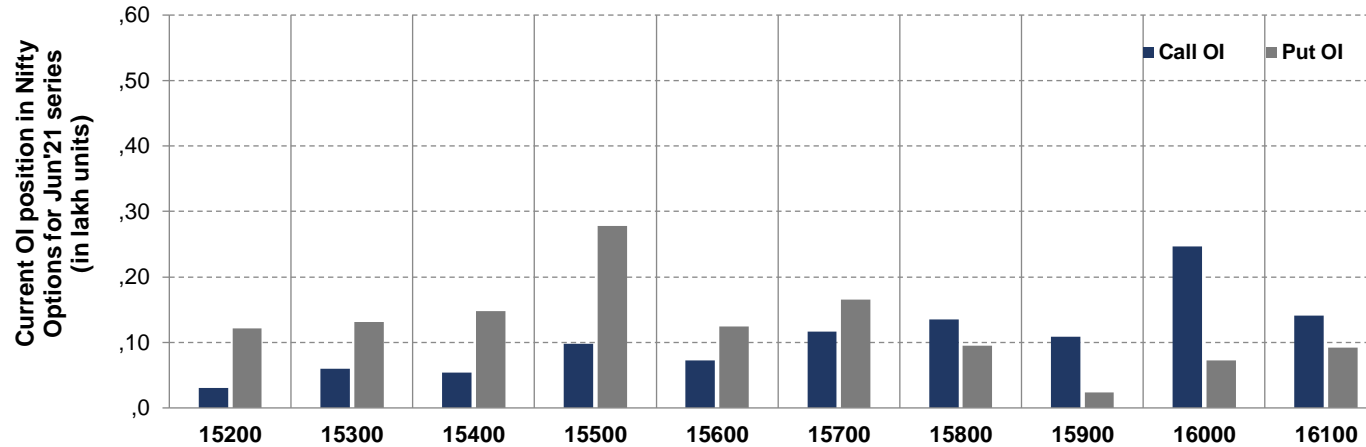
## NIFTY FUTURES



## BANK NIFTY FUTURES



## NIFTY OPTIONS



- Among Nifty calls 16,000 SP from the June month expiry was the most active call with an addition of 0.10 million in open interests.
- Among Nifty puts 15,500 SP from the June month expiry was the most active put with an addition of 0.50 million in open interests.
- The maximum OI outstanding for Calls was at 16,000 SP (2.50mn) and that for Puts was at 15,500 SP (2.80mn)



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