

Morning Mantra

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

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MARKET COMMENTARY

Indian equity benchmarks ended flat with a positive bias on Monday's trading session. After a negative start of the trading day, markets saw a sharp fall during early morning deals, as Former RBI Governor D Subbarao has expressed concerns over 'extreme unevenness' in economic recovery and 'sharpening inequalities' between upper-income segments and lower-income households in the country, cautioning that the trend will hit growth prospects going forward. Terming the uneven recovery 'morally wrong and politically corrosive' he said liquidity in the domestic market and foreign fund inflows are leading to soaring prices of stocks and other assets despite disruptions due to the Covid pandemic.

However, in the last hours of the trade, markets turned positive, after Moody's Investors Service said that India's and Brazil's first-quarter 2021 real GDP data show a strong rebound in both economies following a contraction last year of 4.4 per cent in Brazil and 7.1 per cent in India. Brazil's first-quarter GDP expanded 1.2 per cent from the previous quarter and 2.3 per cent from first-quarter 2020. India's first-quarter GDP rose 1.5 per cent quarter on quarter and year on year. Traders took note of the government data showing that the Index of Industrial Production (IIP) stood at 126.6 points in April this year. The IIP was at 54 points in April 2020 and 126.5 points in April 2019. As per the partial data, IIP growth works out to be 134 per cent in April 2021 over the same month last year, mainly due to the low base effect.

On the global front, European markets were trading higher as investors look ahead to the June meeting of the US Federal Reserve. Asian markets settled mostly higher on Monday, after Malaysia's industrial production accelerated in April. The data from the Department of Statistics showed that industrial production rose 50.1 percent year-on-year in April, following a 9.3 percent increase in March. The growth in production was mainly driven by a rise in production of manufacturing industry, mining and quarrying, and electricity.

MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	52551.53	76.77	0.15
NIFTY	15811.85	12.50	0.08
MIDCAP	22771.12	-156.71	-0.68
SMLCAP	25075.42	-40.88	-0.16
BSEFMC	13302.33	4.70	0.04
AUTO	24090.67	-17.99	-0.07
POWER	2965.01	-59.95	-1.98
REALTY	2804.06	-44.13	-1.55
BSE IT	28827.96	130.89	0.46
BANEX	39572.29	-159.07	-0.40
OIL GAS	17197.88	62.57	0.37
METAL	19420.94	-5.00	-0.03
INDIA VIX	14.71	0.61	4.34

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	893	1137	63
BSE	1611	1711	159

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	6411	5964	7
NSE CASH	78246	71973	9
NSE F&O	3427113	2323418	48

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	29.32	4.46	1.20
SENSEX	32.94	3.34	0.95

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	4801	4257	544
FII	4339	4843	(504)

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	2755.67	5393.22	(2638)
Index Options	302251.44	298112.38	4139
Stock Futures	14423.39	13645.33	778
Stock Options	27728.23	27746.55	(18)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.42	1.35
BANK NIFTY	0.69	0.74

SECURITIES BAN FOR TRADE IN F&O FOR 15-06-2021

CANBK
IBULHSGFIN
NATIONALUM
PNB
SUNTV

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.004	6.006	-0.03
USA	1.467	1.462	0.57

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	90.44	90.49	-0.06

CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
28 June - 21 USD-INR	73.35	0.16	0.22
28 June - 21 EUR-INR	88.90	-0.01	-0.01
28 June - 21 GBP-INR	103.42	-0.19	-0.18
28 June - 21 JPY- INR	66.91	0.06	0.09

KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1863.47	-12.46	-0.64
Silver	27.89	0.01	0.04
Crude-Oil	71.75	0.84	1.13
Brent-Crude	7344	0.75	1.05

INDEX TREND ANALYSIS

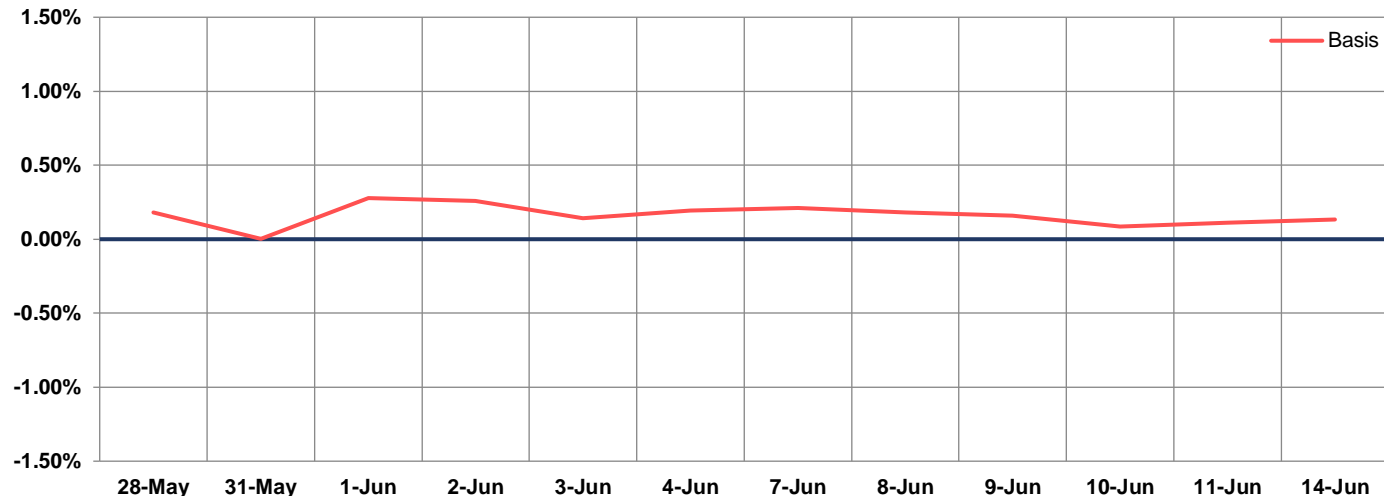
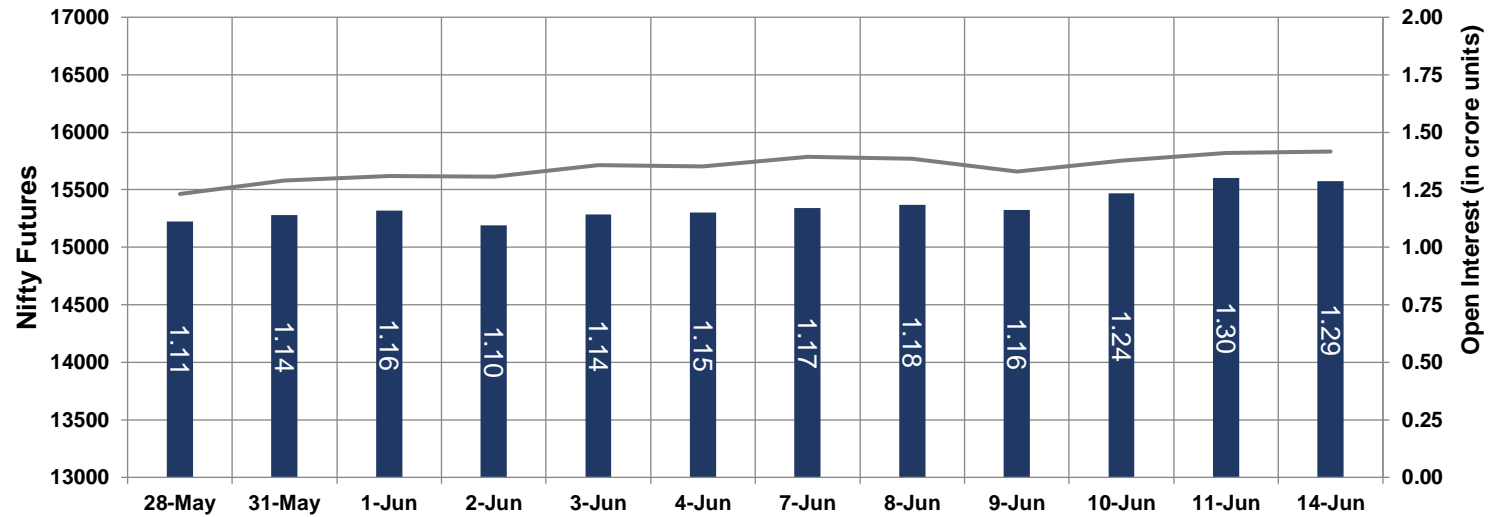
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	15812	15531	15671	15747	15888	15964	Buy	Buy	Buy
SENSEX	52552	51705	52128	52360	52783	53014	Buy	Buy	Buy
NIFTY FUTURES	15836	15554	15695	15772	15913	15989	Buy	Buy	Buy
BANK NIFTY	34951	34153	34552	34773	35172	35394	Neutral	Buy	Buy
CNX IT	28314	27973	28143	28305	28476	28638	Buy	Buy	Buy
CNX MIDCAP	27199	26349	26774	27034	27459	27719	Buy	Buy	Buy
CNX SMALLCAP	9717	9384	9551	9673	9840	9962	Buy	Buy	Buy
INDIA VIX	14.72	13.02	13.87	14.59	15.44	16.16	Sell	Sell	Neutral

NIFTY TECHNICAL & INDICES LEVEL

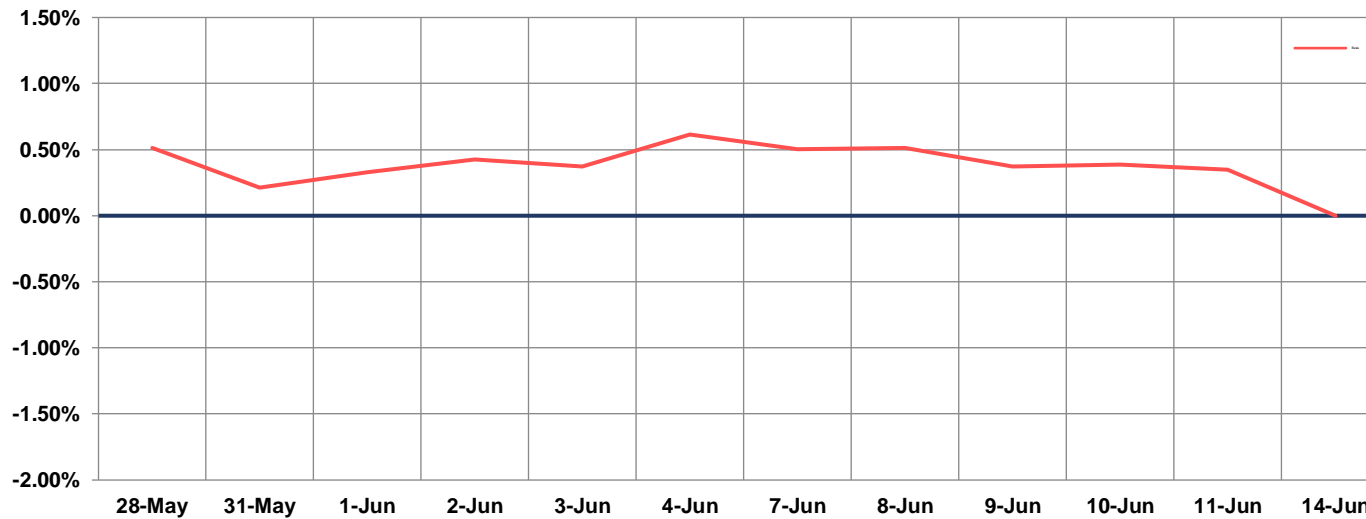
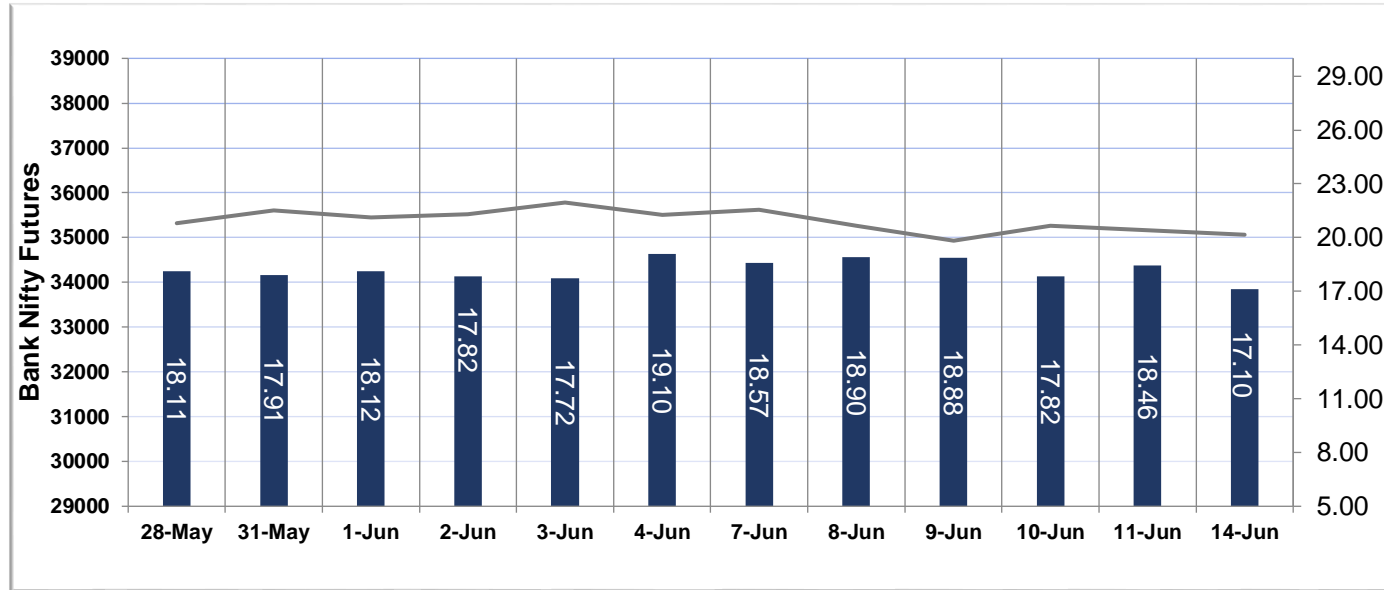


- Nifty Cash prices have settled at **15811.85** up by 0.08 percent from the previous close. On the upper side it has resistance of **15920** and **16040** levels, while lower side it has support of **15670** and **15580** levels. Intraday traders should be cautious and take position accordingly.s

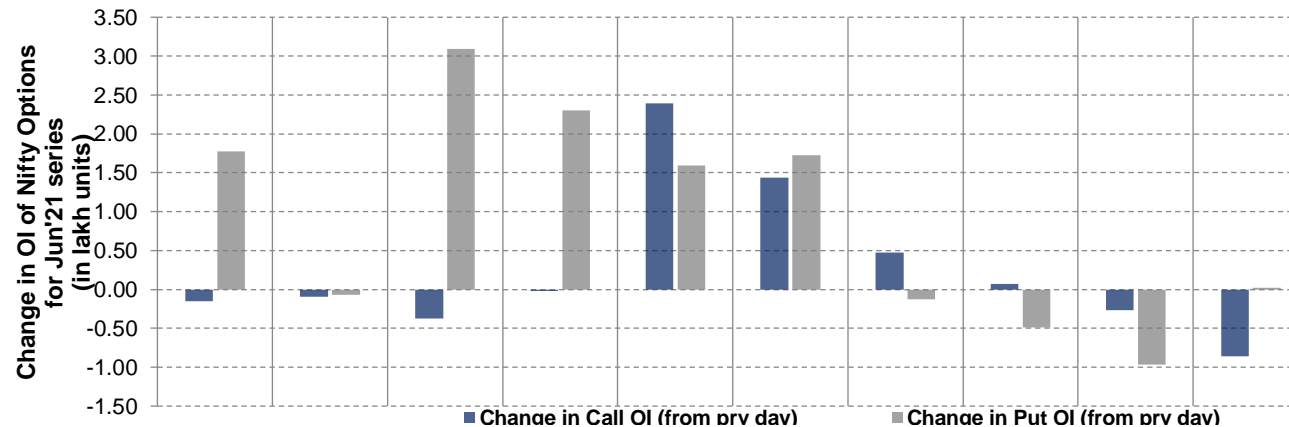
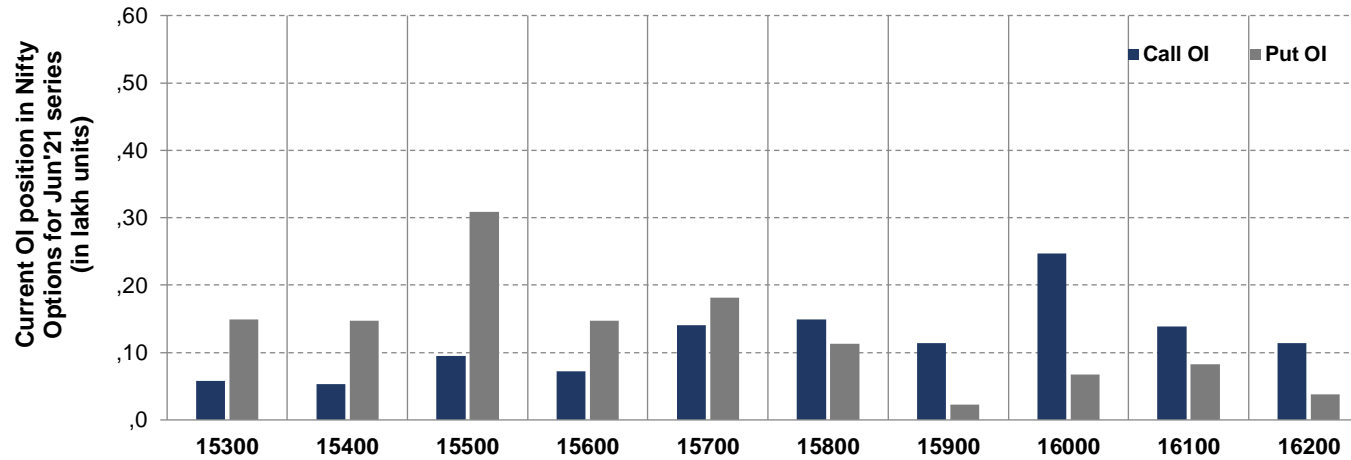
NIFTY FUTURES



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 0.01 million in open interests.
- Among Nifty puts 15,500 SP from the June month expiry was the most active put with an addition of 0.31 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 (3.10mn)

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