

# Morning Mantra

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

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## MARKET COMMENTARY

Sensex, Nifty ended at record closing highs on Tuesday. The start of the day was on positive note, amid report that India reported the lowest daily spike in infections since 31 March with 62,597 new cases in the last 24 hours. With this, the country's total coronavirus caseload has reached 29,570,035. Some support also came in with report that after making a late entry, the south-west monsoon has progressed steadily and, in the first fortnight, covered almost two-thirds of the country, which is almost 15 days ahead of schedule. Market participants largely overlooked the government report that India's retail inflation shot up to six-month high of 6.3 per cent in May, after easing to a three-month low of 4.23 per cent in April. Inflation, based on Consumer Price Index (CPI), has breached the Reserve Bank of India's (RBI) target range for the first time after five months.

Markets remained higher during the whole trading session, taking support with SBI Research's report that if there is no third wave of Covid-19 pandemic, the fiscal position of the Centre and the states will be much better than budgeted for FY22 and the states may garner Rs 60,000 crore more in tax collections at Rs 8.27 lakh crore this fiscal year than they have budgeted. Some optimism also came in with Federation of Indian Export Organisations (FIEO) stating that the order book position of exporters are healthy and the growth story will continue to be a mixed one as outbound shipments of both value added goods and raw material will contribute to push the overall exports of the country. It said India has started on a good note in 2021 and exports figures so far have been encouraging.

On the global front, European markets were trading higher as investors await the start of the U.S. Federal Reserve's latest monetary policy meeting. Asian markets ended mostly higher on Tuesday, after Japan's industrial production increased more than estimated in April. The Ministry of Economy, Trade and Industry said that industrial production rose a seasonally adjusted 2.9 percent month-on-month in April. In the initial estimate, output increased 2.5 percent. Shipment grew 3.1 percent monthly in April. According to the initial estimate, shipment rose 2.6 percent.

## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	52773.05	221.52	0.42
NIFTY	15869.25	57.40	0.36
MIDCAP	22907.41	136.26	0.60
SMLCAP	25186.27	110.85	0.44
BSEFMC	13407.03	104.70	0.79
AUTO	24092.52	1.85	0.01
POWER	2949.34	-15.67	-0.53
REALTY	2847.66	43.60	1.55
BSE IT	28908.23	80.27	0.28
BANEX	39930.73	358.44	0.91
OIL GAS	17271.11	73.23	0.43
METAL	19334.26	-86.68	-0.45
INDIA VIX	14.61	-0.11	-0.75

## ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	1184	807	66
BSE	1896	1328	144

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	7853	6411	23
NSE CASH	67245	78246	(14)
NSE F&O	3042114	3427113	(11)

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	29.43	4.48	1.20
SENSEX	33.06	3.35	0.95

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

FII-DII*	Buy	Sell	Net
DII	3875	4525	(649)
FII	7621	6987	634

Note: FII & DII Figures are provisional

## FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	2530.17	2541.54	(11)
Index Options	303948.88	304543.67	(595)
Stock Futures	15972.80	15220.16	753
Stock Options	20724.88	20775.91	(51)

## PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.42	1.42
BANK NIFTY	0.83	0.69

## SECURITIES BAN FOR TRADE IN F&O FOR 16-06-2021

ADANI PORTS
CANBK
ESCORTS
NATIONALUM
PNB
SUNTV

## 10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.040	6.004	0.60
USA	1.501	1.501	-0.02

## DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	90.57	90.52	0.06

## CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
28 June - 21 USD-INR	73.4	0.09	0.12
28 June - 21 EUR-INR	88.96	0.05	0.06
28 June - 21 GBP-INR	103.17	-0.26	-0.25
28 June - 21 JPY- INR	66.73	-0.16	-0.25

## KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1854.54	-12.24	-0.66
Silver	27.48	-0.39	-1.39
Crude-Oil	71.71	0.83	1.17
Brent-Crude	73.66	0.80	1.11

## INDEX TREND ANALYSIS

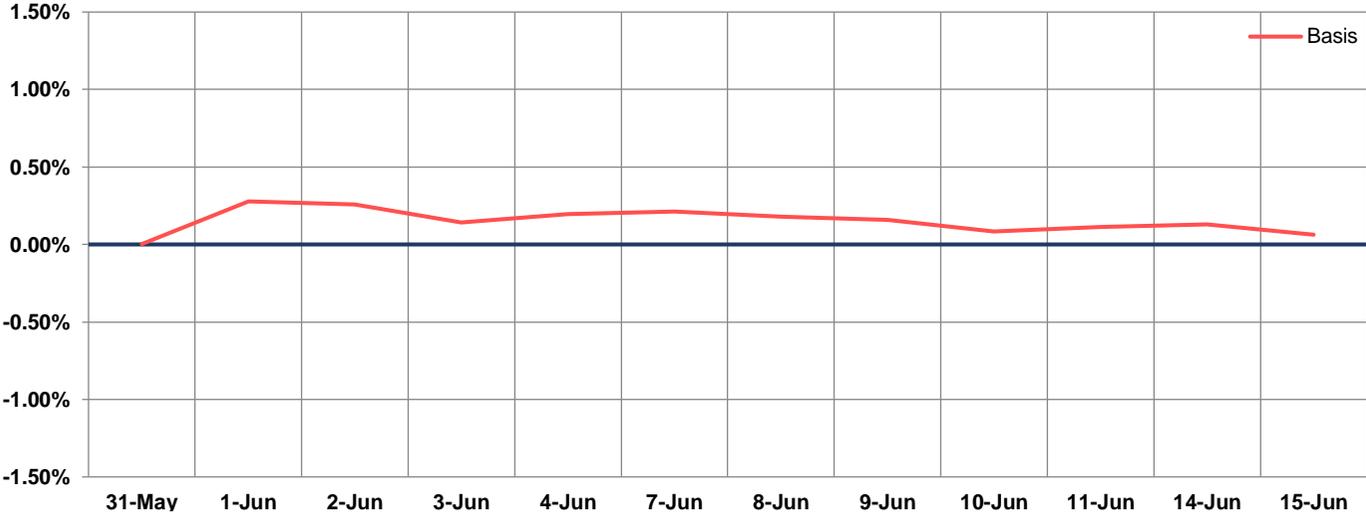
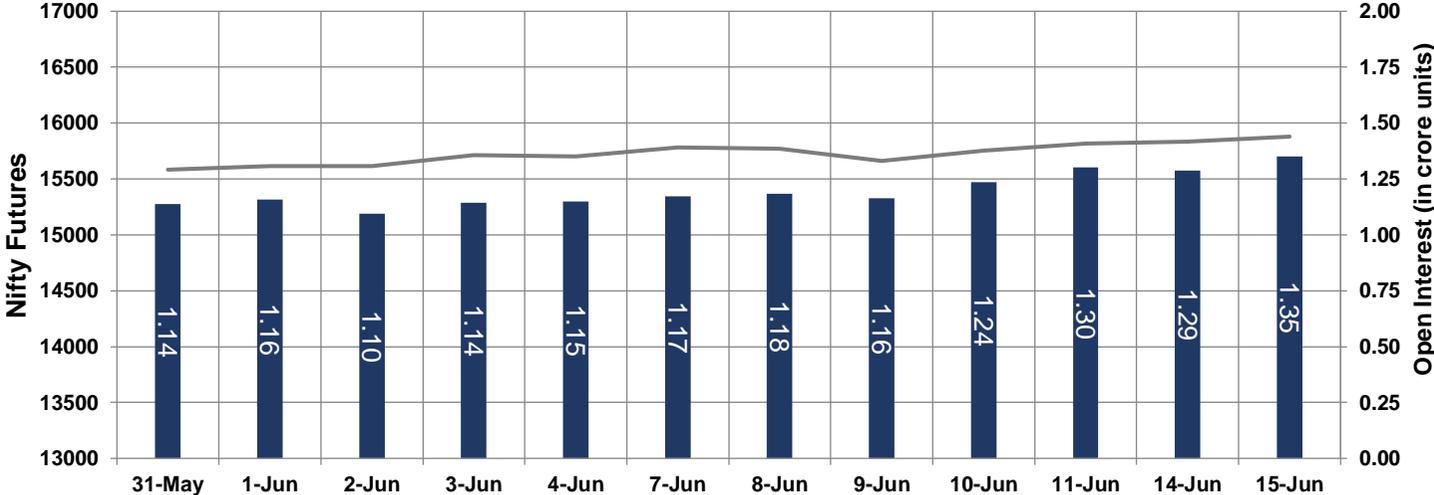
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	15869	15812	15841	15871	15900	15930	Buy	Buy	Buy
SENSEX	52773	52573	52673	52771	52871	52970	Buy	Buy	Buy
NIFTY FUTURES	15871	15823	15847	15878	15902	15933	Buy	Buy	Buy
BANK NIFTY	35248	34762	35005	35161	35404	35561	Buy	Buy	Buy
CNX IT	28378	28197	28288	28416	28506	28635	Buy	Buy	Buy
CNX MIDCAP	27364	27149	27257	27344	27452	27540	Buy	Buy	Buy
CNX SMALLCAP	9760	9711	9736	9774	9798	9836	Buy	Buy	Buy
INDIA VIX	14.61	12.46	13.53	14.35	15.42	16.23	Sell	Sell	Neutral

## NIFTY TECHNICAL & INDICES LEVEL

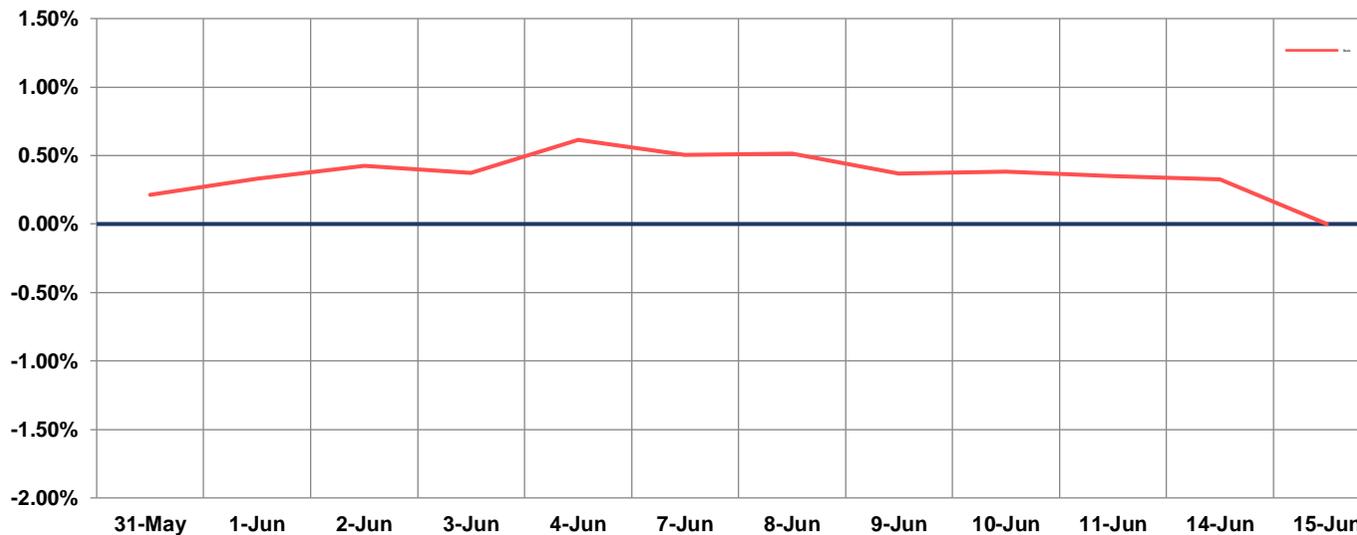
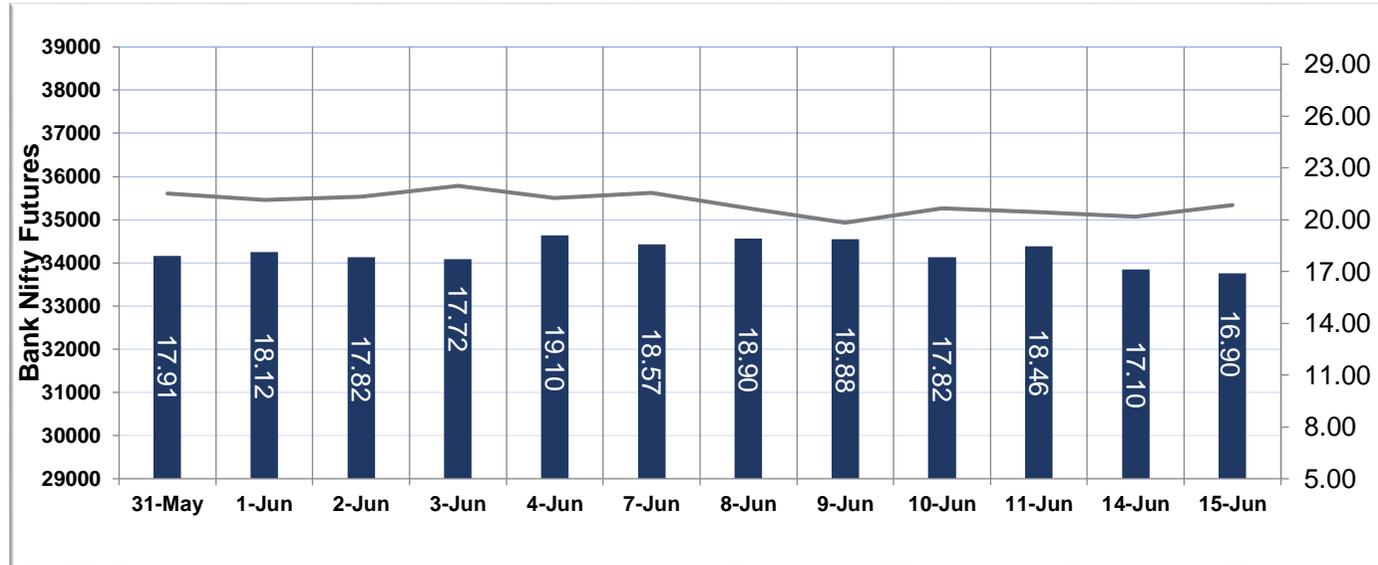


➤ Nifty Cash prices have settled at **15869.25** up by 0.36 percent from the previous close. On the upper side it has resistance of **15920** and **16040** levels, while lower side it has support of **15735** and **15580** levels. Intraday traders should be cautious and take position accordingly.

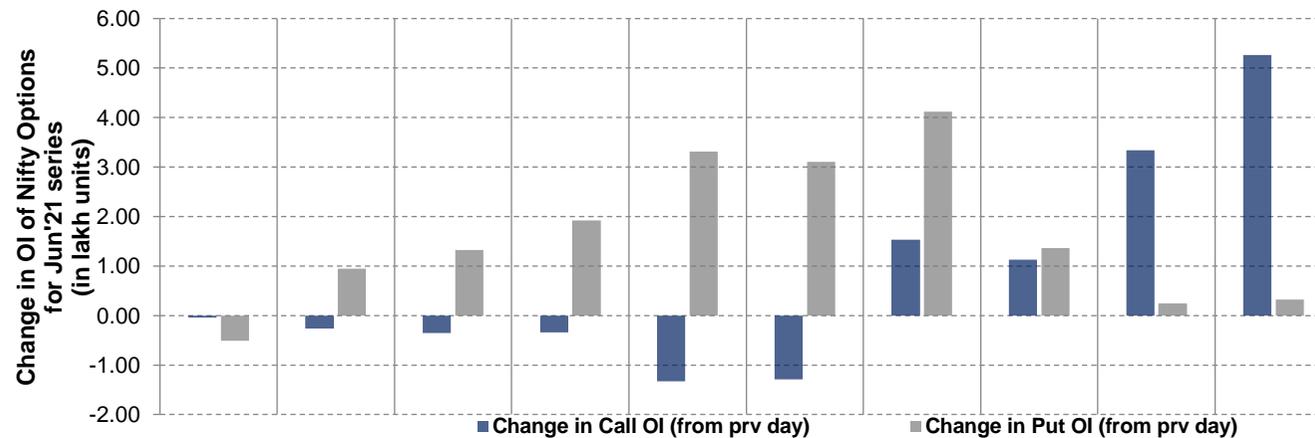
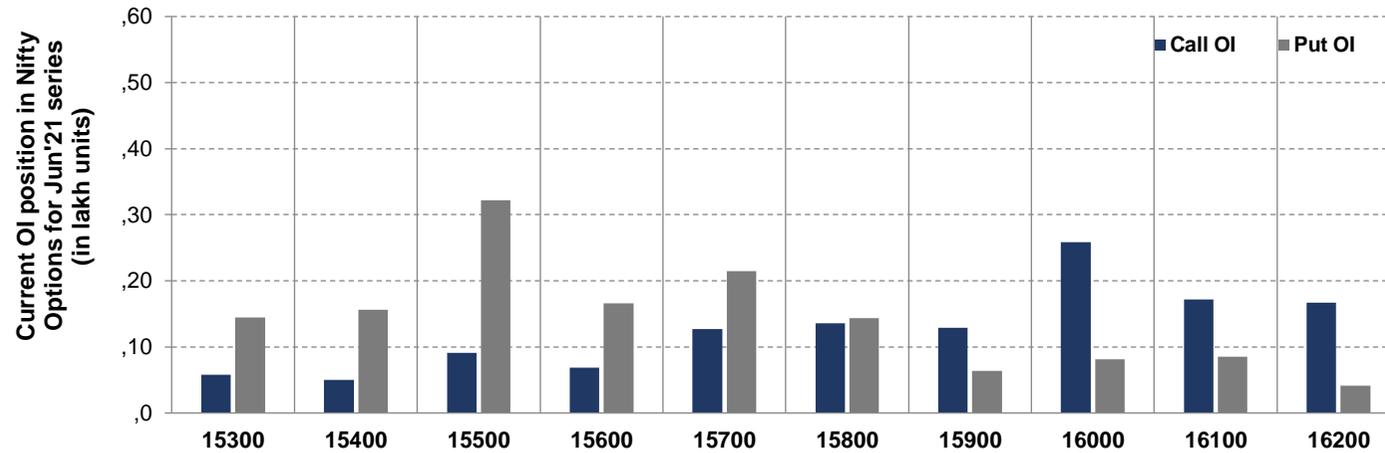
NIFTY FUTURES



## 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 0.11 million in open interests.
- Among Nifty puts 15,500 SP from the June month expiry was the most active put with an addition of 0.13 million in open interests.
- The maximum OI outstanding for Calls was at 16,000 SP (2.60mn) and that for Puts was at 15,500 SP (3.22mn)

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