

# Morning Mantra

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

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## MARKET COMMENTARY

Indian equity benchmarks ended lower with notable losses on Wednesday's trading session. After a negative start of the day, markets traded in green for little time during early morning deals, as the government data showed that India's merchandise exports grew 69.35 per cent year-on-year in May to \$32.27 billion on account of low-base effect as well as rising demand from external markets. The growth has been driven by demand for items such as petroleum goods, engineering goods and gems and jewellery.

But, key indices failed to hold their heads above water and remained lower till the end of the trading session, as traders got cautious, after State Bank of India's research division said that driven by several global and domestic factors, inflation may remain elevated in the coming months. Soumya Kanti Ghosh, Group Chief Economic Adviser at SBI, said that faster-than-anticipated and robust recovery in some advanced countries is likely to exert upward pressure on international commodity prices, including crude oil.

Sentiments over the street remained negative during the trading session, as Global forecasting firm Oxford Economics has said retail inflation spike in May might cause the RBI to revisit its focus on growth risks, adding that a rate hike is still unlikely this year. It stated that the underlying dynamics of the May inflation print augur caution and the recovery remains on uncertain ground and with fiscal support in retreat, the RBI will likely be hesitant to remove policy accommodation anytime soon.

On the global front, European markets were trading lower amid markets await the outcome of the U.S. Federal Reserve's policy meeting. Asian markets ended mostly lower on Wednesday, even after the overall value of core machine orders in Japan advanced a seasonally adjusted 0.6 percent on month in April, the Cabinet Office said on Wednesday - standing at 802.9 billion yen. That missed expectations for an increase of 2.7 percent and was down from 3.7 percent in March. On a yearly basis, core machine orders gained 6.5 percent - again missing expectations for 8.0 percent following the 0.2 percent contraction in the previous month.

## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	52501.98	-271.07	-0.51
NIFTY	15767.55	-101.70	-0.64
MIDCAP	22689.35	-218.06	-0.95
SMLCAP	25015.06	-171.21	-0.68
BSEFMC	13467.89	60.86	0.45
AUTO	23900.83	-191.69	-0.80
POWER	2910.15	-39.19	-1.33
REALTY	2816.96	-30.70	-1.08
BSE IT	28986.45	78.22	0.27
BANKEK	39675.91	-254.82	-0.64
OIL GAS	17227.28	-43.83	-0.25
METAL	18835.95	-498.31	-2.58
INDIA VIX	14.87	0.26	1.78

## ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	720	1290	50
BSE	1294	1837	124

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	6360	7853	(19)
NSE CASH	67358	67245	0
NSE F&O	4428511	3042114	46

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	29.24	4.45	1.20
SENSEX	32.90	3.34	0.95

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

FII-DII*	Buy	Sell	Net
DII	4028	4902	(874)
FII	5940	6811	(870)

Note: FII & DII Figures are provisional

## FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	3161.13	3747.22	(586)
Index Options	452454.53	450605.35	1849
Stock Futures	13040.16	13416.09	(376)
Stock Options	21450.33	21631.26	(181)

## PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.14	1.42
BANK NIFTY	0.67	0.83

## SECURITIES BAN FOR TRADE IN F&O FOR 17-06-2021

ADANI PORTS
BHEL
CANBK
ESCORTS
NATIONALUM
PNB

## 10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.045	6.045	0.00
USA	1.485	1.499	-0.91

## DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	90.52	90.53	-0.02

## CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
28 June - 21 USD-INR	73.41	-0.02	-0.03
28 June - 21 EUR-INR	89.00	0.02	0.02
28 June - 21 GBP-INR	103.61	0.34	0.33
28 June - 21 JPY- INR	66.84	0.12	0.18

## KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1859.76	1.95	0.10
Silver	27.73	0.05	0.20
Crude-Oil	72.51	0.39	0.54
Brent-Crude	74.63	0.64	0.88

## INDEX TREND ANALYSIS

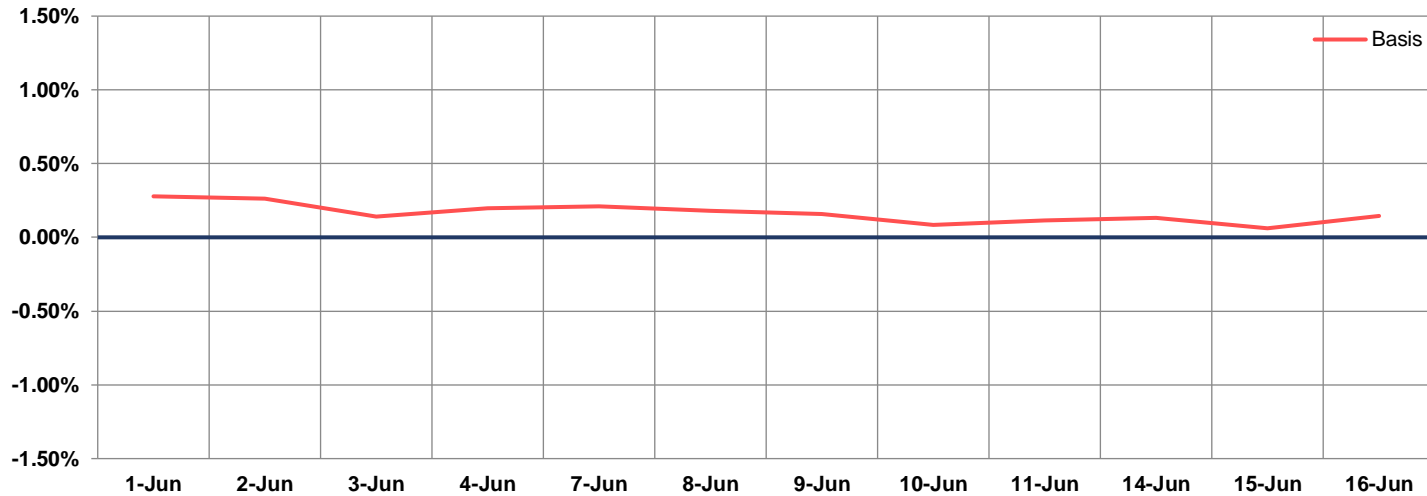
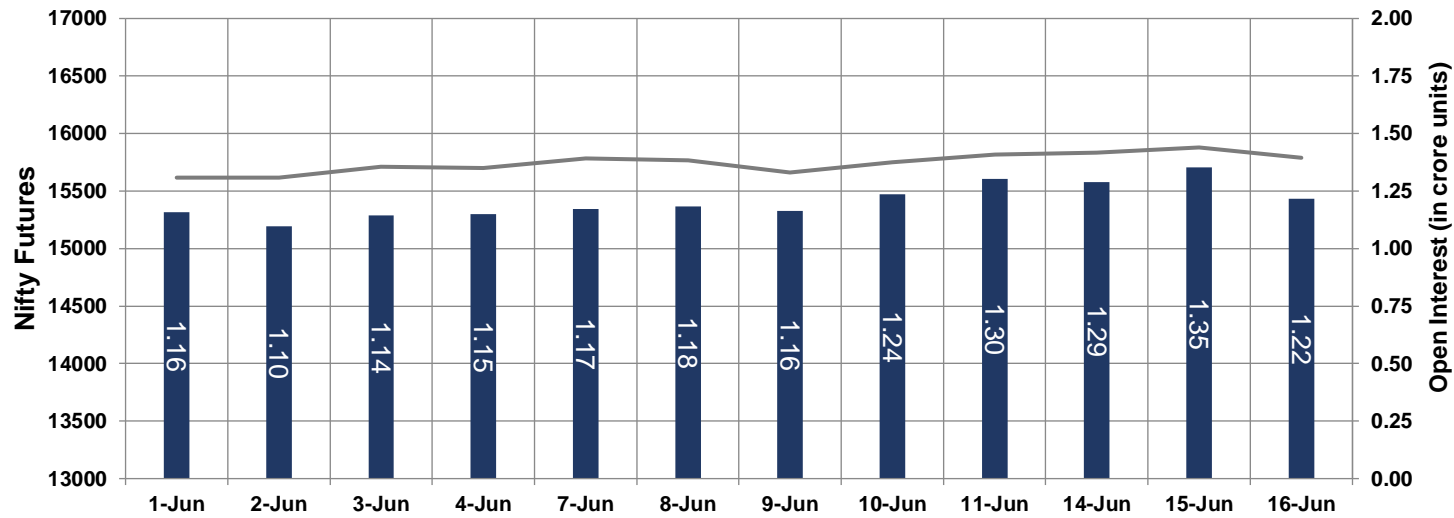
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	15768	15659	15713	15797	15851	15935	Neutral	Buy	Buy
SENSEX	52502	52191	52346	52581	52737	52972	Neutral	Buy	Buy
NIFTY FUTURES	15777	15690	15734	15809	15853	15928	Neutral	Buy	Buy
BANK NIFTY	35004	34636	34820	35100	35284	35564	Neutral	Buy	Buy
CNX IT	28449	28071	28260	28430	28619	28789	Buy	Buy	Buy
CNX MIDCAP	27109	26834	26971	27184	27321	27534	Neutral	Buy	Buy
CNX SMALLCAP	9710	9597	9653	9739	9795	9881	Buy	Buy	Buy
INDIA VIX	14.86	12.90	13.88	14.60	15.58	16.30	Neutral	Sell	Neutral

## NIFTY TECHNICAL & INDICES LEVEL

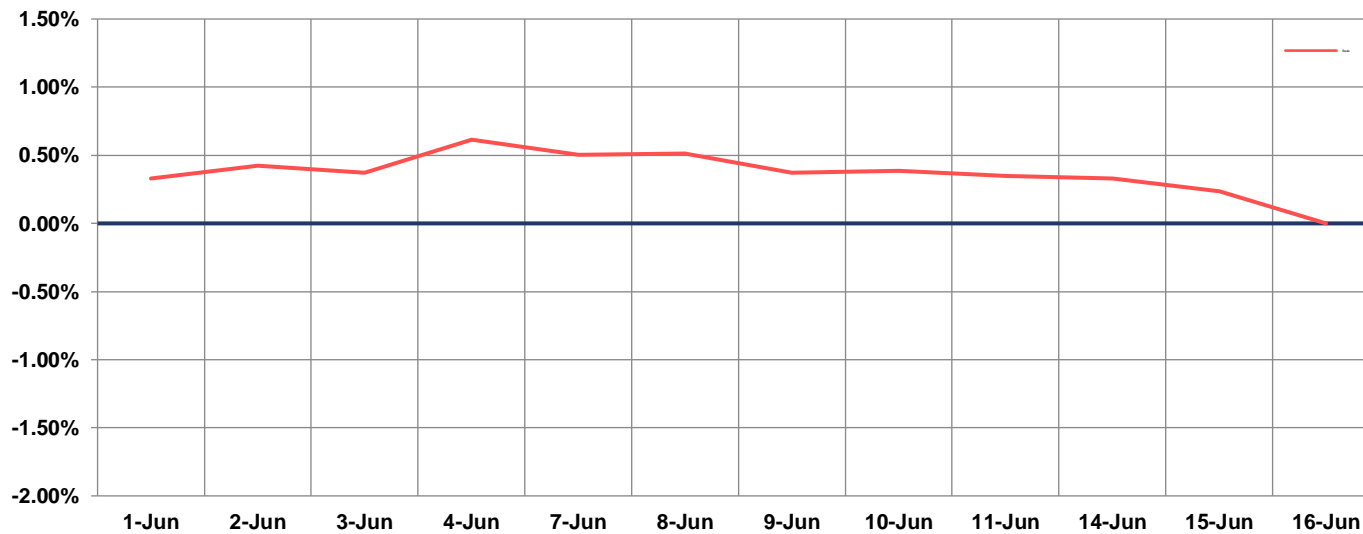
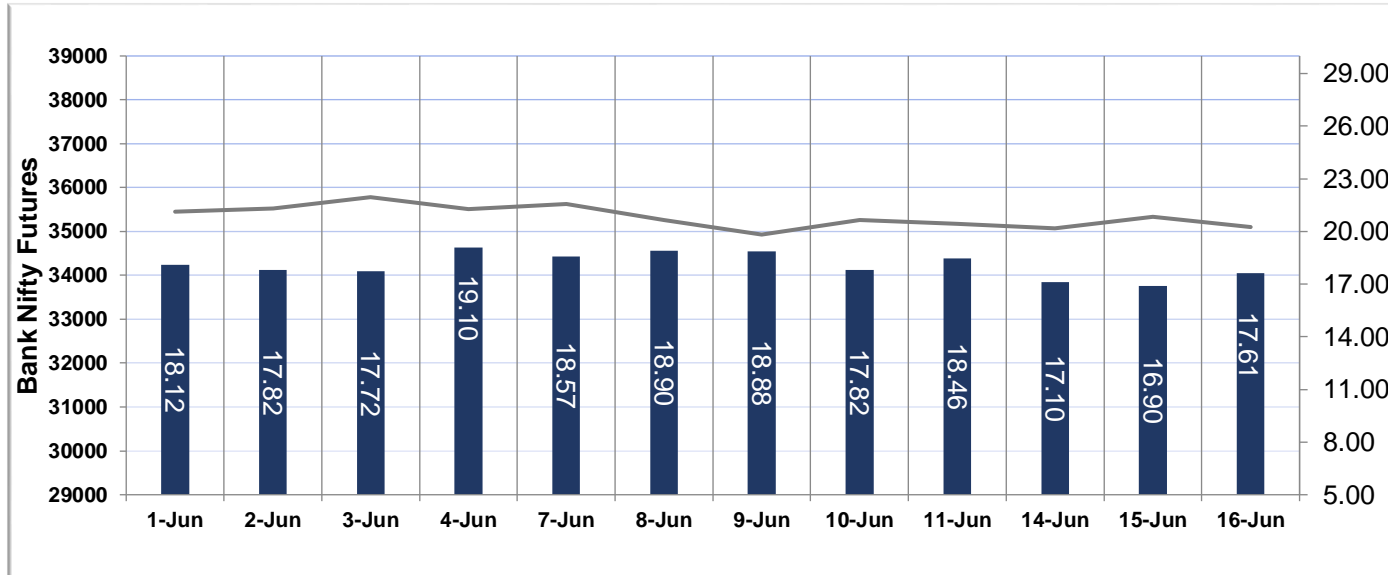


- Nifty Cash prices have settled at **15767.55** down by 0.64 percent from the previous close. On the upper side it has resistance of **15820** and **15960** levels, while lower side it has support of **15640** and **15580** levels. Intraday traders should be cautious and take position accordingly.

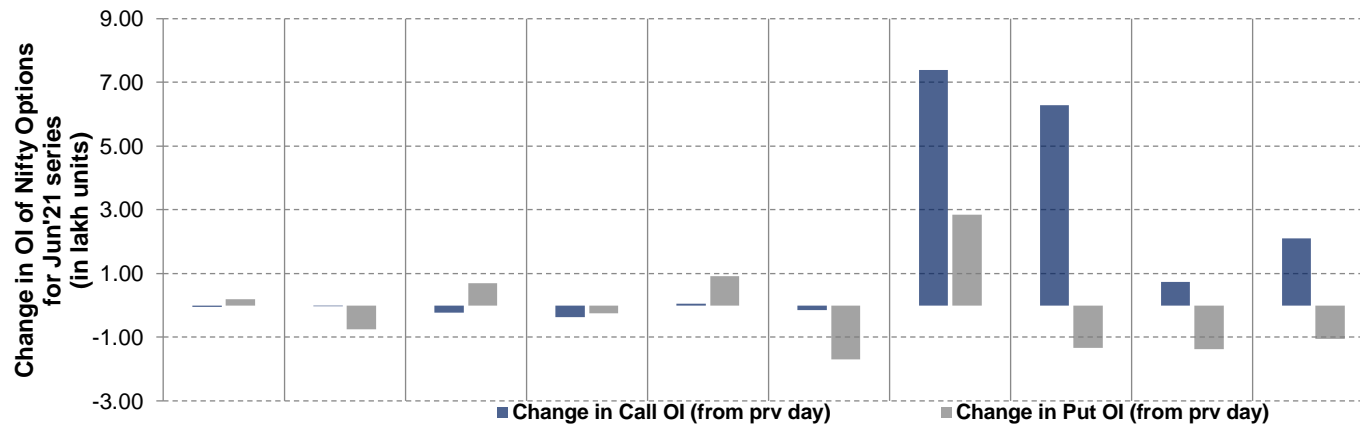
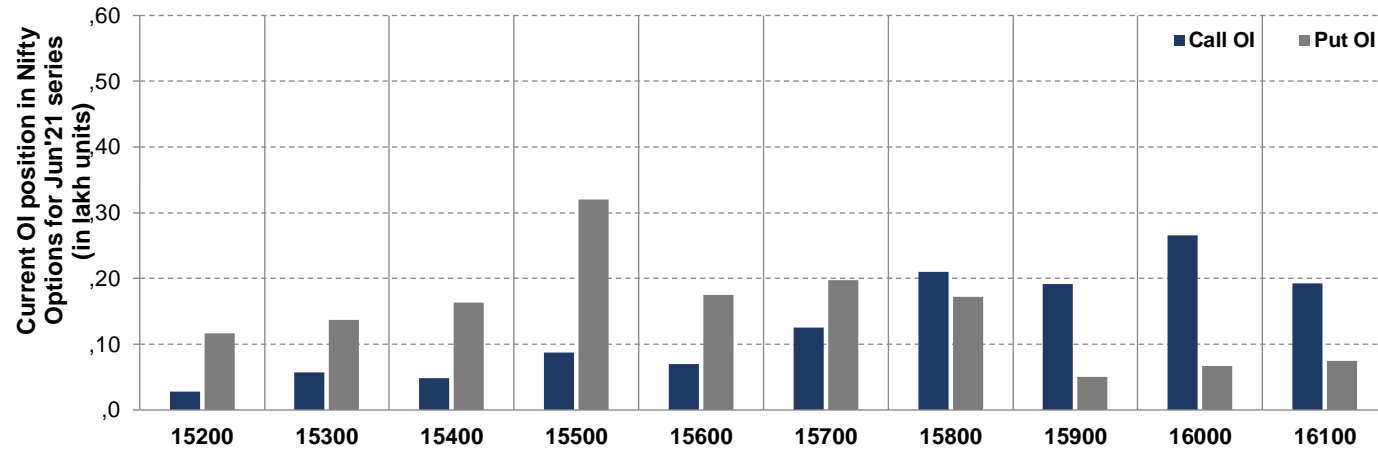
## NIFTY FUTURES



## 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 0.07 million in open interests.
- Among Nifty puts 15,500 SP from the June month expiry was the most active put with a reduction of 0.02 million in open interests.
- The maximum OI outstanding for Calls was at 16,000 SP (2.66mn) and that for Puts was at 15,500 SP (3.20mn)



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