

Morning Mantra

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

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MARKET COMMENTARY

Indian equity benchmarks ended in red on Thursday's trading session. The start of the day was on a negative note, as India reported 62,224 new Covid-19 cases on Wednesday, taking the total to 29,633,105. The death count climbed to 3,79,573 with 2,542 fresh fatalities. Domestic sentiments remained downbeat with a RBI article stating that bank deposits and currency holding with the public have been adversely impacted during the second COVID wave, indicating a heavy outgo towards pandemic-induced medical expenditure.

In late morning deals, key indices cut most of their losses, as traders found some support with the Central Board of Direct Taxes (CBDT) stating that the net direct tax collections (after adjusting refunds) between April 1-June 15 stood at Rs 1,85,871 crore, compared to Rs 92,762 crore over the corresponding period of the preceding year, representing an increase of 100.4 percent over the collections of the preceding year. The rise is mainly driven by personal income tax and advance tax collections.

But, in the last hours of the trade, markets again witnessed sharp fall and finally ended lower. Traders got cautious, after the commerce ministry said that sellers who do not declare local content percentage while uploading their products at public procurement portal GeM will lose out on business and will not be able to participate in bids in which buyer has chosen to procure only made-in-India items. Sentiments were also fragile as foreign institutional investors (FIIs) stood as net sellers in the capital market as they offloaded shares worth Rs 870.29 crore on June 16, as per provisional exchange data.

On the global front, European markets were trading lower after the Federal Reserve brought forward its forecasts for hiking interest rates as it looks to prevent overheating in the US economy. Asian markets ended mostly lower on Thursday, after the value of Singapore's non-oil domestic exports were down a seasonally adjusted 0.1 percent on month in May, Enterprise Singapore said on Thursday - coming in at SGD15.4 billion. That was well shy of expectations for an increase of 4.7 percent following the 8.8 percent decline in April. On a yearly basis, NODX climbed 8.8 percent - missing forecasts for an increase of 16.0 percent following the 6.0 percent increase in the previous month.

MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	52323.33	-178.65	-0.34
NIFTY	15691.40	-76.15	-0.48
MIDCAP	22396.07	-293.28	-1.29
SMLCAP	24868.93	-146.13	-0.58
BSEFMC	13476.04	8.15	0.06
AUTO	23572.04	-328.79	-1.38
POWER	2840.78	-69.37	-2.38
REALTY	2767.40	-49.56	-1.76
BSE IT	29236.34	249.89	0.86
BANKEX	39266.18	-409.73	-1.03
OIL GAS	17166.54	-60.74	-0.35
METAL	18429.51	-406.44	-2.16
INDIA VIX	15.29	0.42	2.86

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	684	1323	47
BSE	1358	1861	141

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	5786	6360	(9)
NSE CASH	71553	67358	6
NSE F&O	9456030	4428511	114

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	29.10	4.43	1.24
SENSEX	32.56	3.30	0.96

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	5108	5062	45
FII	6728	7607	(880)

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	4412.28	4789.86	(378)
Index Options	863305.36	863306.85	(1)
Stock Futures	14766.21	15225.81	(460)
Stock Options	20096.31	20183.22	(87)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.07	1.14
BANK NIFTY	0.74	0.67

SECURITIES BAN FOR TRADE IN F&O FOR 18-06-2021

ADANI PORTS
BHEL
CANBK
ESCORTS
PNB

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.019	6.019	0.00
USA	1.511	1.569	-3.71

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	91.90	91.12	0.85

CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
28 June - 21 USD-INR	74.18	0.76	1.04
28 June - 21 EUR-INR	88.56	-0.42	-0.47
28 June - 21 GBP-INR	103.50	-0.10	-0.09
28 June - 21 JPY- INR	67.01	0.23	0.34

KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1770.83	-48.26	-2.65
Silver	25.77	-1.40	-5.01
Crude-Oil	70.15	-2.00	-2.74
Brent-Crude	72.39	-2.01	-2.70

INDEX TREND ANALYSIS

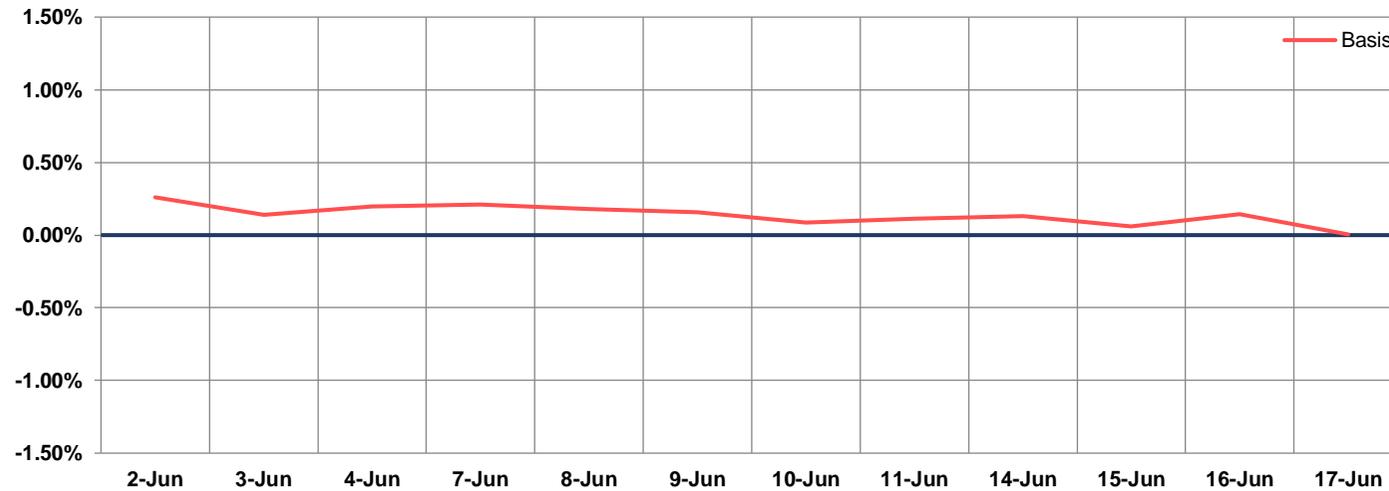
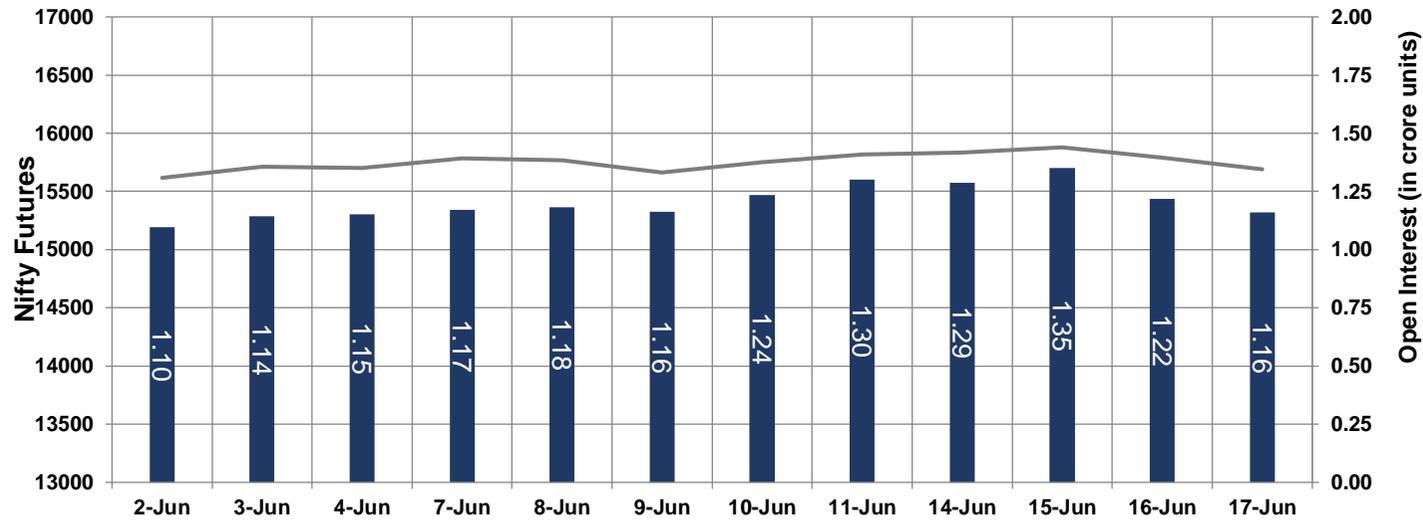
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	15691	15540	15616	15693	15768	15845	Neutral	Buy	Buy
SENSEX	52323	51813	52068	52296	52551	52779	Neutral	Buy	Buy
NIFTY FUTURES	15681	15543	15612	15695	15764	15846	Neutral	Buy	Buy
BANK NIFTY	34605	34224	34415	34649	34839	35073	Neutral	Buy	Buy
CNX IT	28611	28185	28398	28556	28770	28928	Buy	Buy	Buy
CNX MIDCAP	26776	26393	26584	26878	27070	27364	Neutral	Buy	Buy
CNX SMALLCAP	9659	9544	9601	9682	9739	9820	Neutral	Buy	Buy
INDIA VIX	15.29	13.77	14.53	15.29	16.05	16.81	Neutral	Sell	Neutral

NIFTY TECHNICAL & INDICES LEVEL

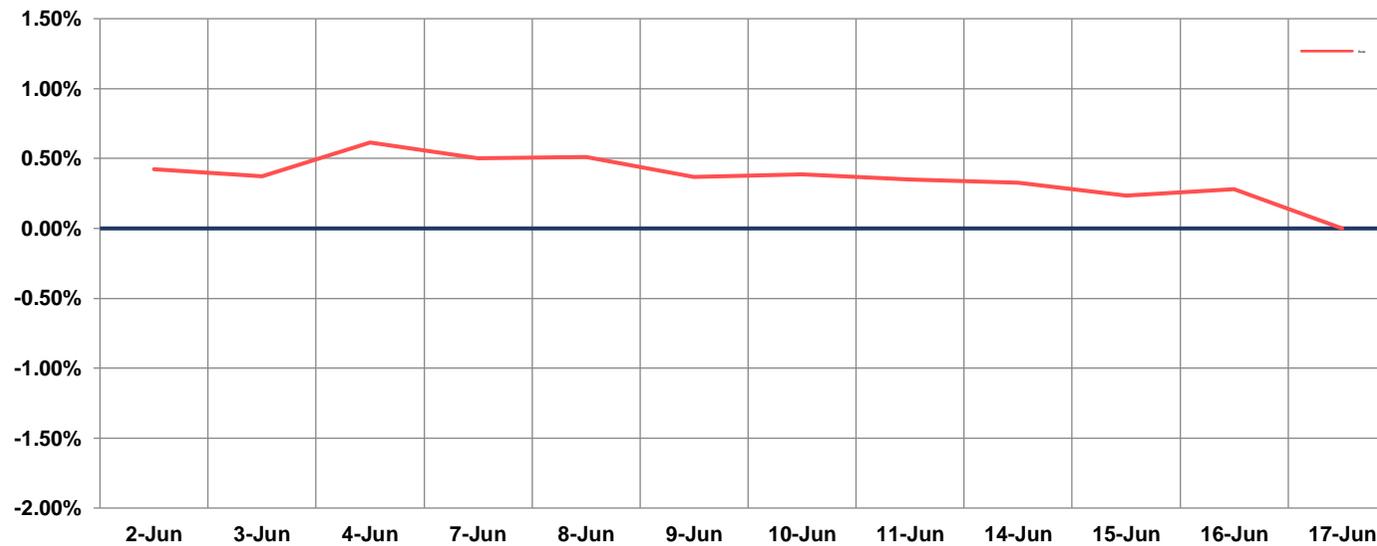
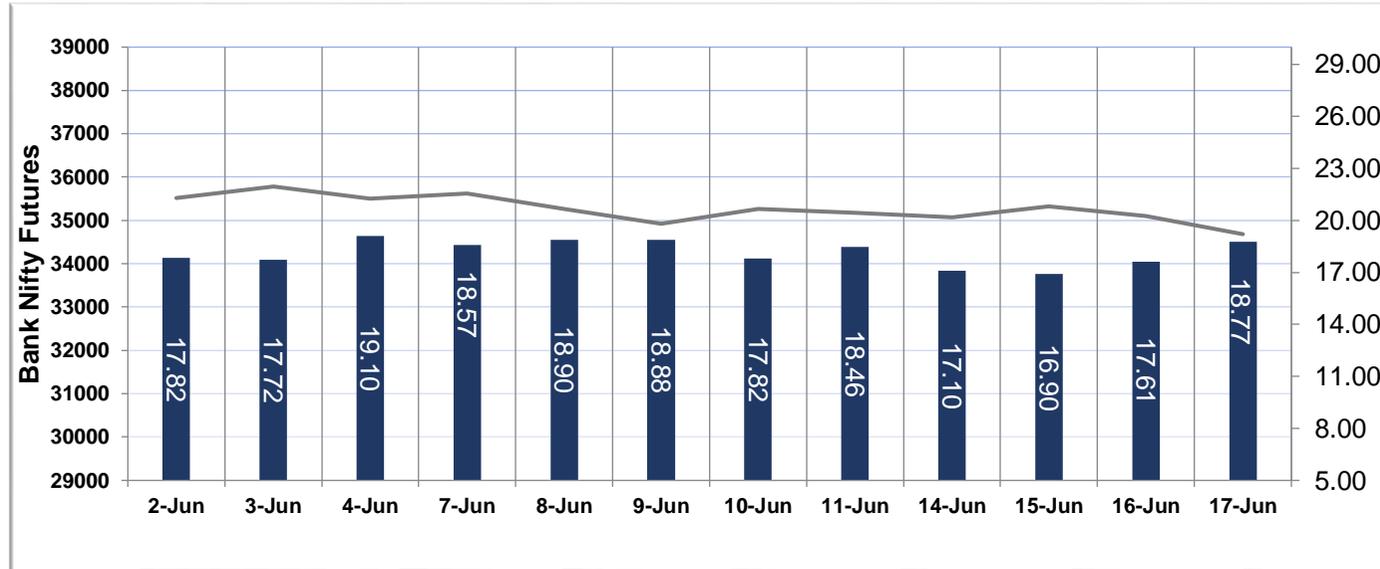


➤ Nifty Cash prices have settled at **15691.40** down by 0.48 percent from the previous close. On the upper side it has resistance of **15780** and **15850** levels, while lower side it has support of **15570** and **15490** levels. Intraday traders should be cautious and take position accordingly.

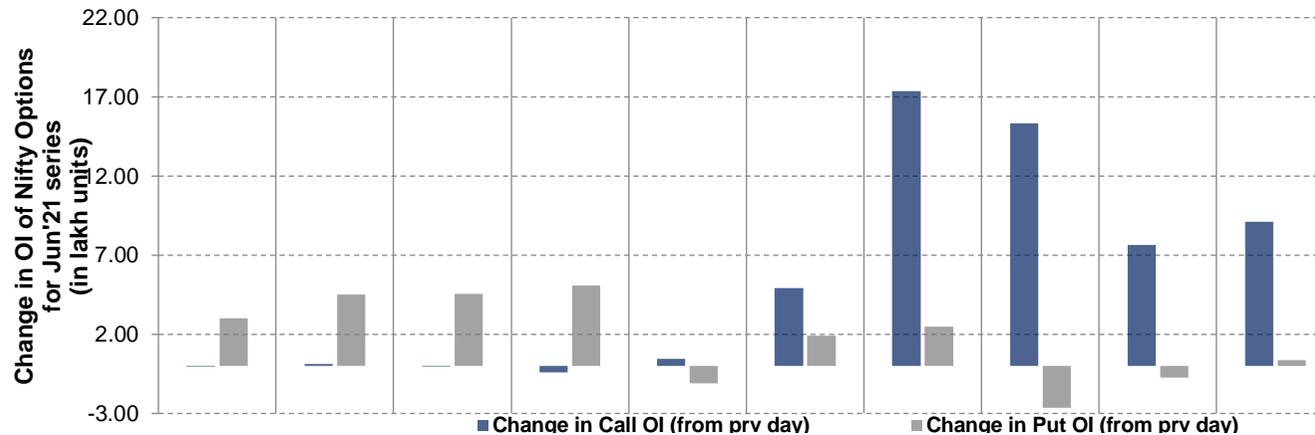
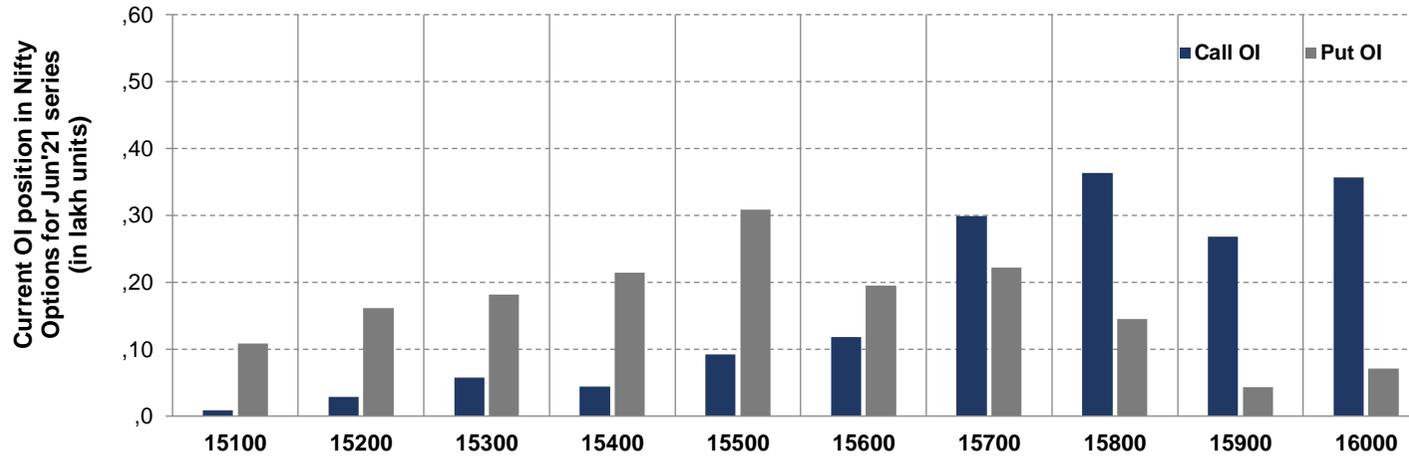
NIFTY FUTURES



BANK NIFTY FUTURES



NIFTY OPTIONS



- Among Nifty calls 15,800 SP from the June month expiry was the most active call with an addition of 1.53 million in open interests.
- Among Nifty puts 15,500 SP from the June month expiry was the most active put with a reduction of 0.11 million in open interests.
- The maximum OI outstanding for Calls was at 15,800 SP (3.63mn) and that for Puts was at 15,500 SP (3.10mn)

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