

Morning Mantra

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

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MARKET COMMENTARY

Indian equity benchmarks ended higher with notable gains on Monday. After a negative start, markets remained lower for the most part of the trading session, as cautiousness came after Care Ratings said the credit growth for FY22 is likely to remain in low double-digit on the back of muted economic activity. Traders were cautious, as private report has projected real GDP growth of 8.7 per cent in FY22, down from 11.1 per cent it had forecast earlier. However, it revised up the FY23 forecast from 4 per cent to 5.4 per cent.

Adding more worries among market participants, a private report stated that hiring across sectors declined in May, though the tech industry job market rebounded from the pandemic-induced downturn as many technology companies have been on full expansion mode. There was a 2 percent decline in the overall number of new job posts in May on the SCIKEY Market Network, a job site, including in sectors like banking with a dip of 12 percent, retail 16 percent, and FMCG 12 percent, while there was a growth of 5 percent in the insurance sector.

But, in the last hours of the trade, indices turned positive, taking support with a UN report stated that India received \$64 billion in Foreign Direct Investment in 2020, the fifth largest recipient of inflows in the world, It also said that the COVID-19 second wave in the country weighs heavily on the country's overall economic activities but its strong fundamentals provide optimism for the medium term. Some support also came in as Chief Economic Advisor (CEA) K V Subramanian has said the government is open to coming out with more measures to boost the economy which has been hit by the second wave of the coronavirus pandemic.

On the global front, European markets were trading higher. Asian markets ended mostly lower on Monday, after China kept its benchmark lending rates unchanged, as widely expected. The one-year loan prime rate was maintained at 3.85 percent and the five-year loan prime rate was retained at 4.65 percent. The one-year and five-year loan prime rates were last lowered in April 2020. The one-year loan prime rate was cut by 20 basis points and five-year rate by 10 basis points in April 2020.

MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	52574.46	230.01	0.44
NIFTY	15746.50	63.15	0.40
MIDCAP	22420.06	181.85	0.82
SMLCAP	24854.25	205.42	0.83
BSEFMC	13553.64	50.15	0.37
AUTO	23267.37	-118.63	-0.51
POWER	2832.58	70.43	2.55
REALTY	2806.97	64.86	2.37
BSE IT	29065.02	-81.45	-0.28
BANKEK	39499.93	322.01	0.82
OIL GAS	17065.17	198.72	1.18
METAL	18195.96	137.37	0.76
INDIA VIX	15.06	0.26	1.77

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	1255	771	57
BSE	2023	1289	151

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	6254	8819	(29)
NSE CASH	60876	97405	(38)
NSE F&O	3740221	3922007	(5)

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	29.19	4.31	1.22
SENSEX	32.35	3.39	0.98

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	4028	3890	138
FII	4675	5920	(1245)

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	4897.46	5375.91	(478)
Index Options	359343.78	357609.84	1734
Stock Futures	34895.78	34821.75	74
Stock Options	14859.92	14408.84	451

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.22	1.18
BANK NIFTY	1.08	0.80

SECURITIES BAN FOR TRADE IN F&O FOR 22-06-2021

IDEA
SUNTV

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.034	6.006	0.47
USA	1.440	1.450	-0.71

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	91.94	92.26	-0.35

CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
28 June - 21 USD-INR	74.22	0.22	0.29
28 June - 21 EUR-INR	88.32	0.14	0.15
28 June - 21 GBP-INR	103.00	0.15	0.14
28 June - 21 JPY- INR	67.43	0.21	0.31

KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1785.02	21.81	1.24
Silver	26.00	0.27	1.03
Crude-Oil	72.77	1.13	1.58
Brent-Crude	74.40	0.89	0.20

INDEX TREND ANALYSIS

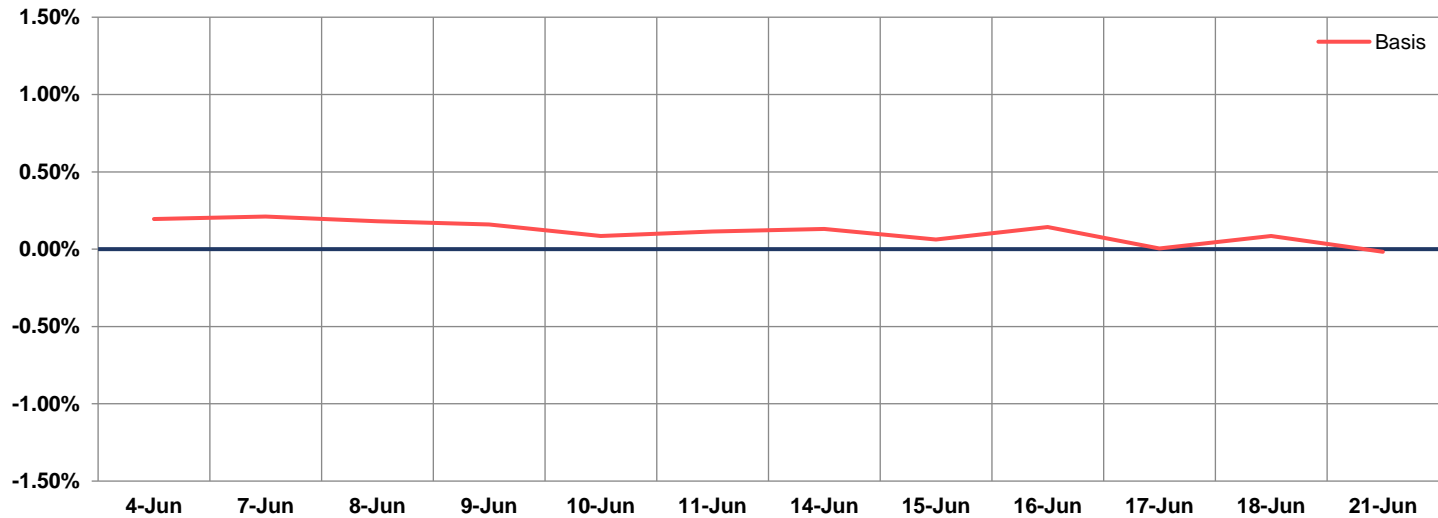
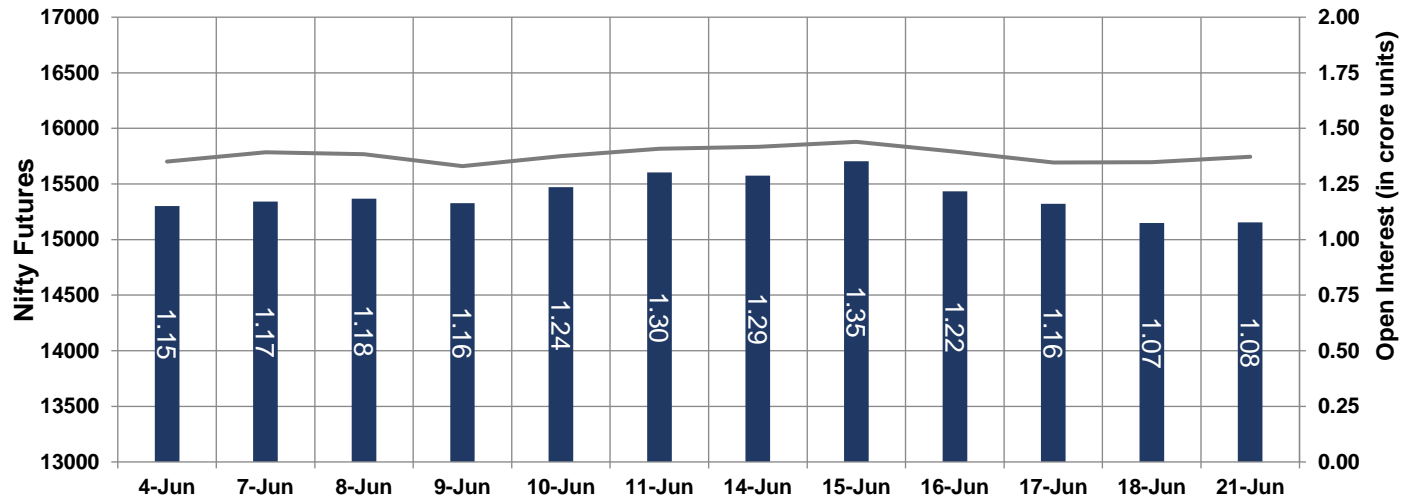
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	15747	15413	15580	15672	15839	15932	Buy	Buy	Buy
SENSEX	52574	51426	52000	52315	52889	53204	Buy	Buy	Buy
NIFTY FUTURES	15749	15422	15586	15673	15836	15924	Buy	Buy	Buy
BANK NIFTY	34871	33589	34230	34579	35220	35569	Neutral	Neutral	Buy
CNX IT	28367	27972	28169	28281	28479	28591	Neutral	Neutral	Buy
CNX MIDCAP	26705	25791	26248	26487	26945	27184	Neutral	Buy	Buy
CNX SMALLCAP	9636	9330	9483	9565	9718	9800	Neutral	Buy	Buy
INDIA VIX	15.06	13.21	14.14	15.30	16.22	17.38	Neutral	Sell	Neutral

NIFTY TECHNICAL & INDICES LEVEL

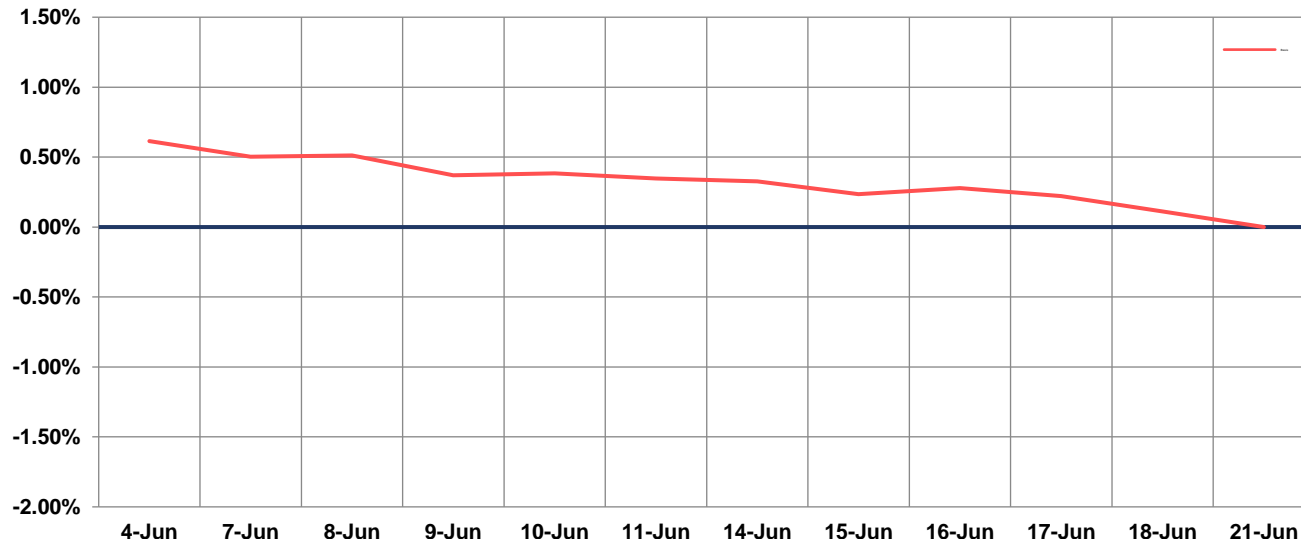
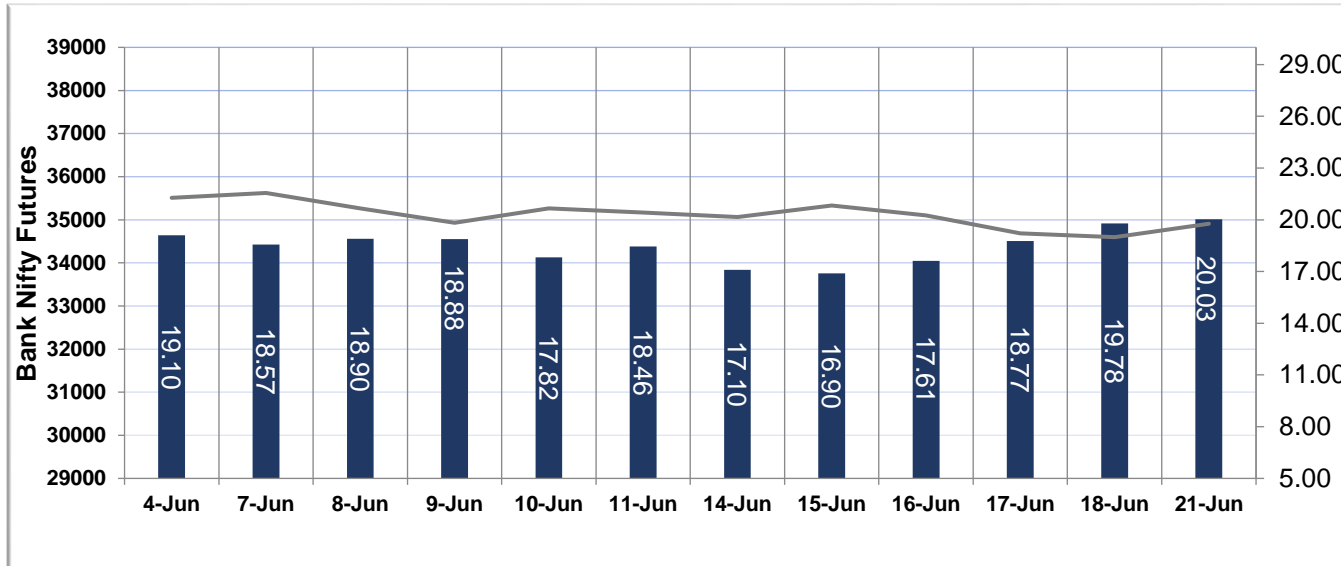


- Nifty Cash prices have settled at **15746.50** up by 0.40 percent from the previous close. On the upper side it has resistance of **15810** and **15930** levels, while lower side it has support of **15630** and **15550** levels. Intraday traders should be cautious and take position accordingly.

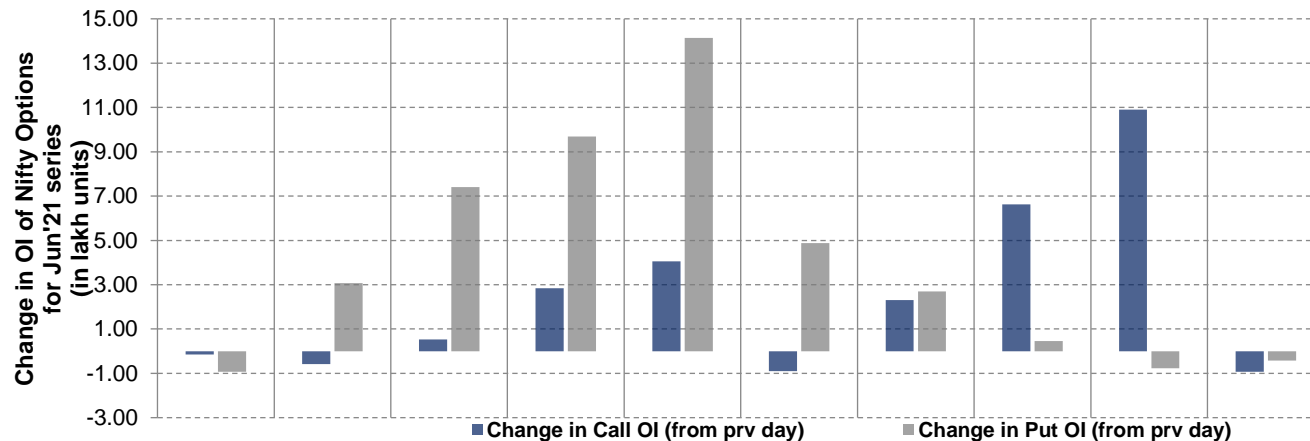
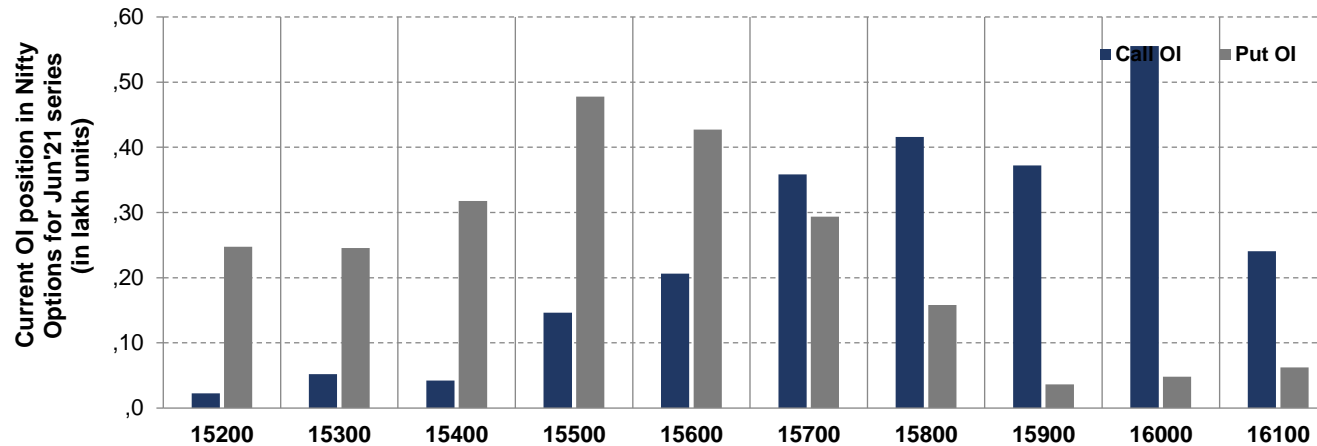
NIFTY FUTURES



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 1.10 million in open interests.
- Among Nifty puts 15,500 SP from the June month expiry was the most active put with an addition of 1.00 million in open interests.
- The maximum OI outstanding for Calls was at 16,000 SP (5.55mn) and that for Puts was at 15,500 SP (4.80mn)

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