

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 Tuesday. Markets made a strong start of the day, as sentiments got a boost with report that India reported 39,000 Covid cases, the lowest since March 18. The pace of vaccination also picked up, boosting expectations of a faster economic recovery. On Monday, India administered a record 8.1 million doses as the central government-led free for all vaccination drive kicked off. Some support also came in as the survey conducted by Ficci showed that with states easing lockdown curbs due to declining number of COVID-19 cases, there are immediate indications of improvement in economic activity as companies are hopeful of better performance in the next 6 to 12 months.

Traders remained positive during the trading session, as the RBI data showed that bank credit grew by 5.74 per cent to Rs 108.43 lakh crore and deposits rose by 9.73 per cent to Rs 153.13 lakh crore in the fortnight ended June 4, 2021. However, in the last hour of the trade, key indices cut most of their gains to end the trading day on a flat note, as traders got concerned with report stating that Indian companies' market capitalization has grown at the fastest pace last year among major economies despite contraction in GDP, flagging the risks to financial stability it poses.

On the global front, European markets were trading mostly in red as investors paused for breath after recent volatility driven by the US interest rate outlook. Asian markets settled mostly higher on Tuesday, after Taiwan's export orders increased more than expected in May. The data from the Ministry of Economic Affairs showed that export orders advanced 29.8 percent year-on-year in May. Orders for mineral products accelerated 182.1 percent yearly in May and those of basic metals and articles thereof surged 95.3 percent. Demand for plastics and articles thereof, rubber and articles thereof increased 80.7 percent and transport equipment gained 73.8 percent.

MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	52588.71	14.25	0.03
NIFTY	15772.75	26.25	0.17
MIDCAP	22493.26	73.20	0.33
SMLCAP	25060.31	206.06	0.83
BSEFMC	13525.44	-28.20	-0.21
AUTO	23570.67	303.30	1.30
POWER	2865.70	33.12	1.17
REALTY	2785.94	-21.03	-0.75
BSE IT	29271.98	206.96	0.71
BANKEK	39373.66	-126.77	-0.32
OIL GAS	17183.62	118.45	0.69
METAL	18258.73	62.77	0.34
INDIA VIX	14.74	-0.32	-2.12

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	1207	792	55
BSE	1996	1254	113

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	5498	6254	(12)
NSE CASH	65062	60876	7
NSE F&O	4430681	3740221	18

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	29.05	4.32	1.21
SENSEX	32.29	3.38	0.99

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	5099	4797	302
FII	6488	7516	(1028)

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	6199.68	5530.42	669
Index Options	457367.03	450527.39	6840
Stock Futures	46767.15	47104.48	(337)
Stock Options	11928.49	11917.72	11

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.08	1.22
BANK NIFTY	0.76	1.08

SECURITIES BAN FOR TRADE IN F&O FOR 23-06-2021

IDEA
SUNTV

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.026	6.028	-0.05
USA	1.4852	1.4850	0.01

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	92.03	91.89	0.14

CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
28 June - 21 USD-INR	74.37	0.18	0.24
28 June - 21 EUR-INR	88.46	0.19	0.21
28 June - 21 GBP-INR	103.24	0.27	0.26
28 June - 21 JPY- INR	67.31	-0.09	-0.14

KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1779.86	-3.69	-0.21
Silver	25.83	-0.10	-0.40
Crude-Oil	73.06	-0.06	-0.08
Brent-Crude	74.92	0.02	0.03

INDEX TREND ANALYSIS

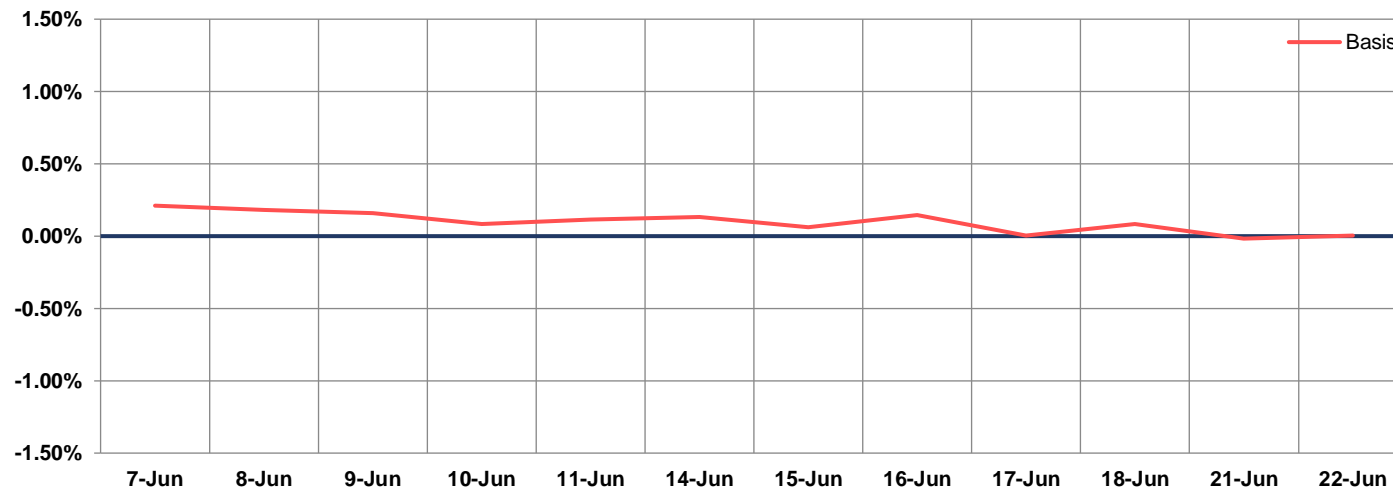
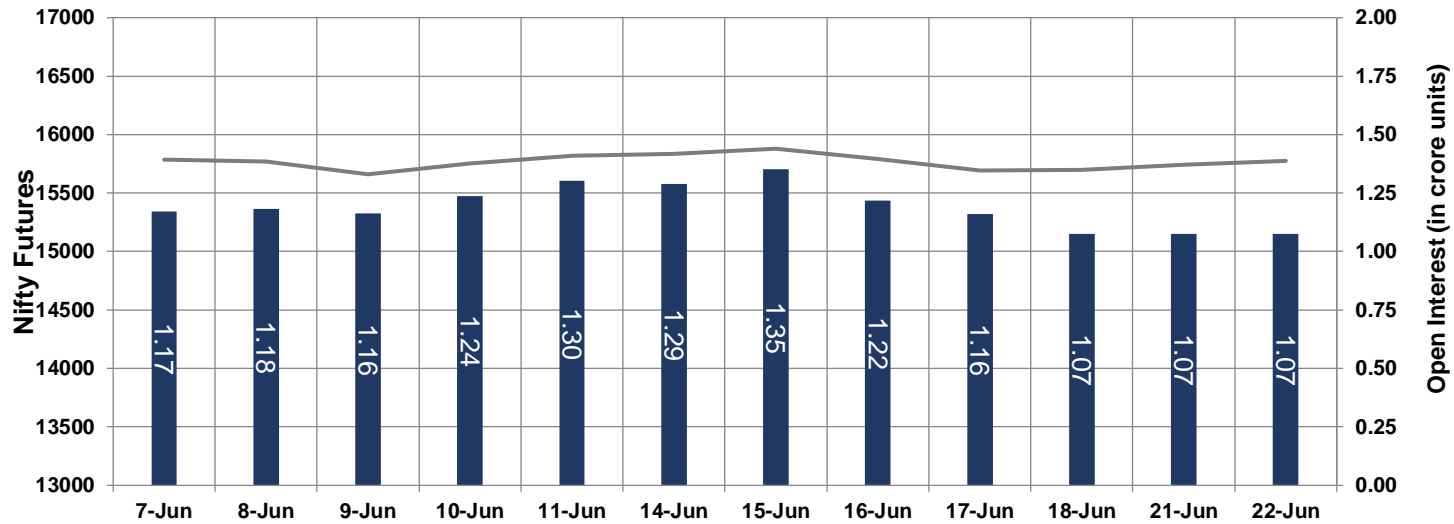
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	15773	15663	15718	15807	15862	15951	Buy	Buy	Buy
SENSEX	52589	52186	52387	52722	52924	53259	Buy	Buy	Buy
NIFTY FUTURES	15757	15670	15713	15795	15839	15920	Buy	Buy	Buy
BANK NIFTY	34745	34280	34512	34897	35130	35515	Neutral	Neutral	Buy
CNX IT	28524	28266	28395	28525	28654	28785	Buy	Neutral	Buy
CNX MIDCAP	26733	26500	26616	26802	26918	27104	Neutral	Buy	Buy
CNX SMALLCAP	9686	9615	9651	9707	9742	9798	Buy	Buy	Buy
INDIA VIX	14.74	14.07	14.40	14.76	15.09	15.45	Sell	Sell	Neutral

NIFTY TECHNICAL & INDICES LEVEL

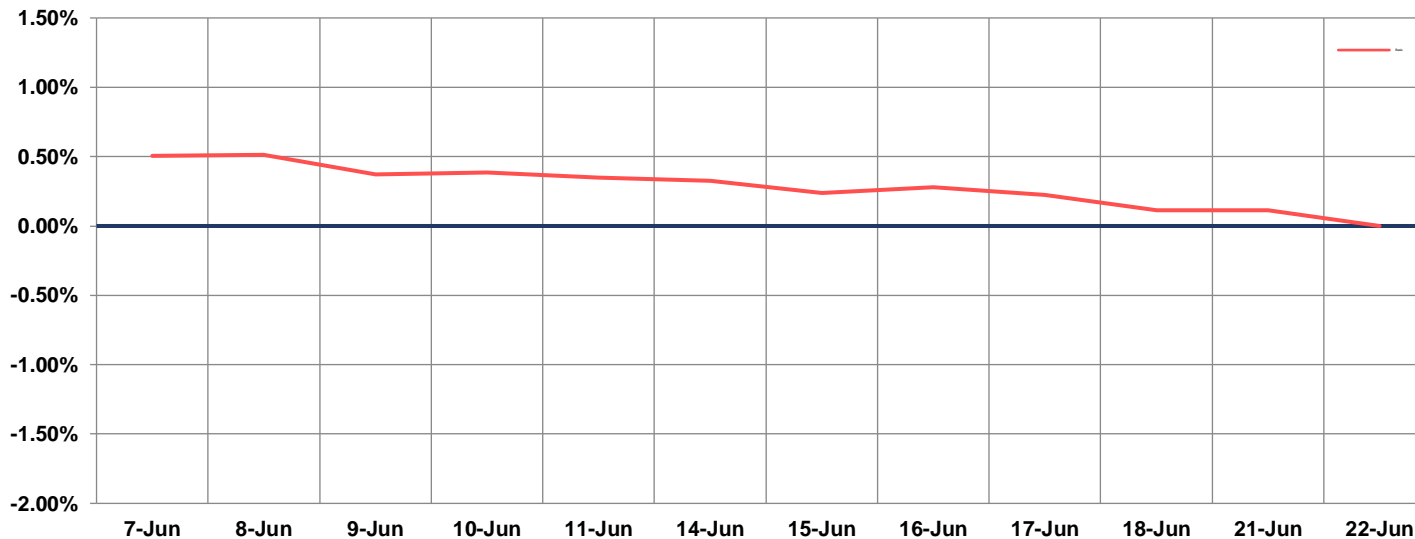
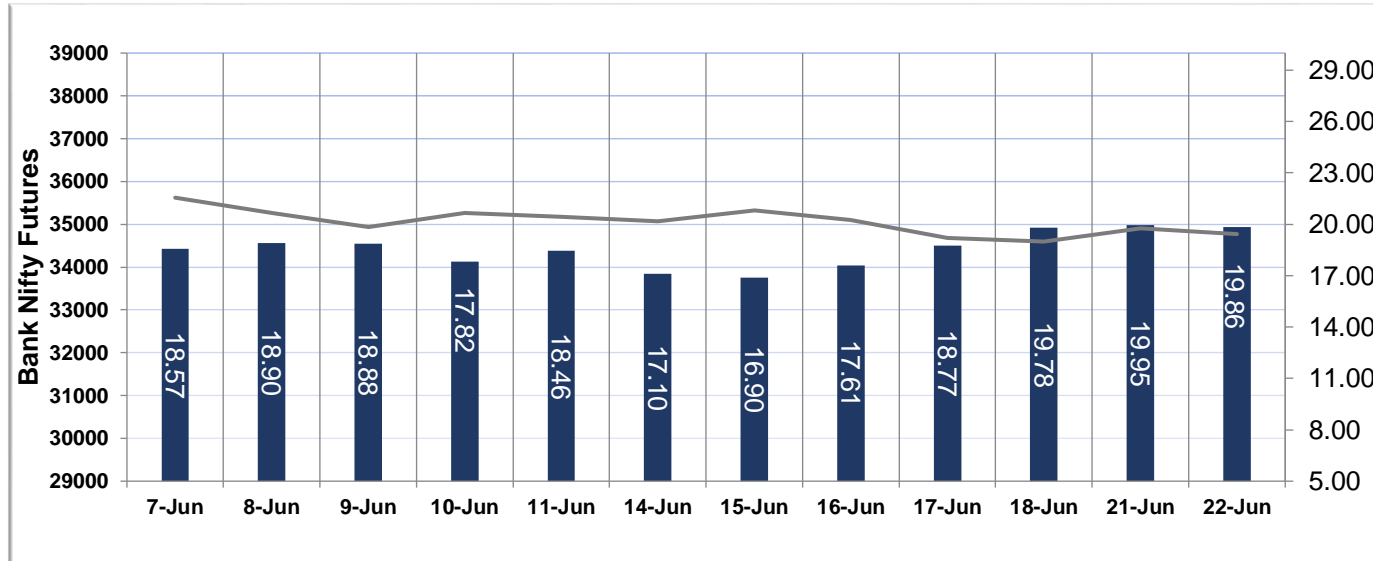


➤ Nifty Cash prices have settled at **15772.75** up by 0.17 percent from the previous close. On the upper side it has resistance of **15850** and **15930** levels, while lower side it has support of **15630** and **15520** levels. Intraday traders should be cautious and take position accordingly.

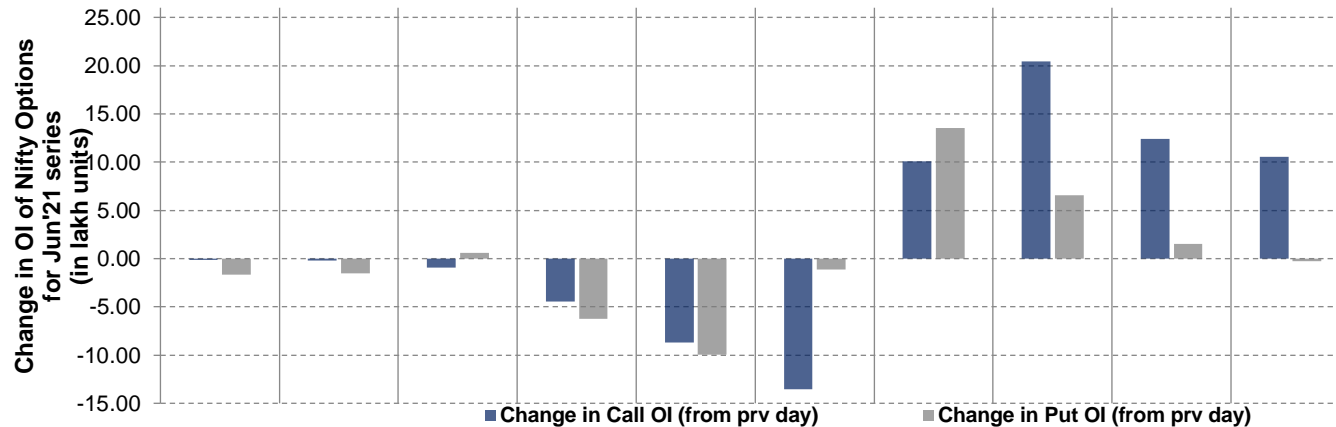
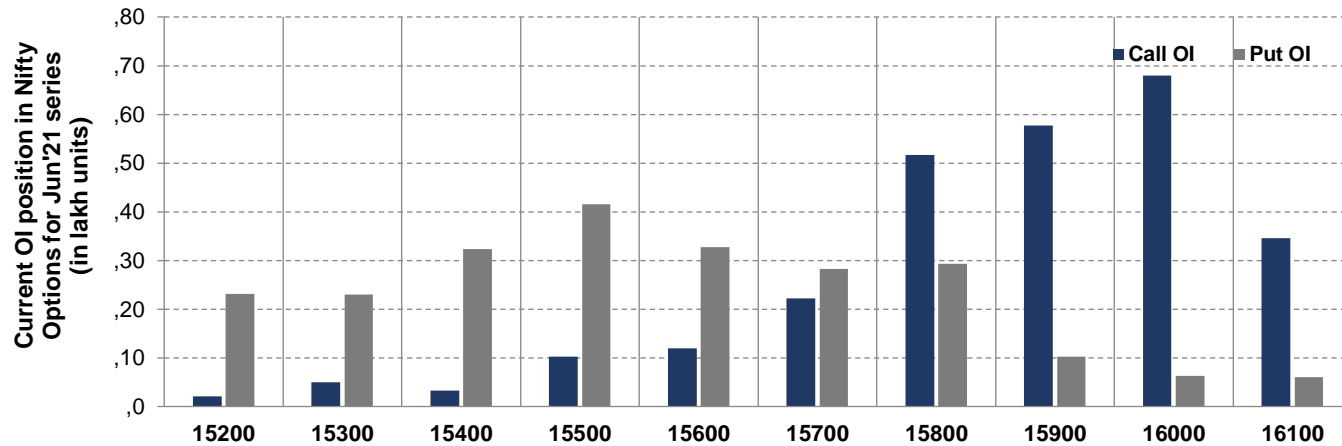
NIFTY FUTURES



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 1.24 million in open interests.
- Among Nifty puts 15,500 SP from the June month expiry was the most active put with a reduction of 0.62 million in open interests.
- The maximum OI outstanding for Calls was at 16,000 SP (6.80mn) and that for Puts was at 15,500 SP (4.15mn)

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