

# 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 Thursday. Markets made a positive start of the trading day, as sentiments got a boost with data released by the Department for Promotion of Industry and Internal Trade (DPIIT) showing that India had attracted a total foreign direct investments (FDI) inflow of \$6.24 billion in April, up by 38 per cent year-on-year. Meanwhile, India has recorded 54,319 cases in the last 24 hours, taking the country's total coronavirus caseload to 30,082,169. India also recorded a spike in new deaths with 978 fatalities being reported yesterday. The death toll now stands at 392,014.

Firm trade persisted over the Dalal Street for the whole trading session and in the second half of the trading session, markets added more gains to end on a strong note. Traders remained positive, after the government has notified the accounting standards for small and medium companies that revise the turnover and borrowing limits as well as help in making disclosure requirements less onerous. Besides, Finance Minister Nirmala Sitharaman said the government will actively pursue cases against economic offenders to bring back defrauded money of banks.

On the global front, European markets were trading higher as investors focused on an economic rebound against the backdrop of fears of a tapering in global monetary stimulus, while Carrefour rose on plans to potentially restructure its foreign units. Asian markets ended mostly higher on Thursday, after consumer sentiment in South Korea strengthened in June, the Bank of Korea said on Thursday with a composite consumer sentiment index score of 110.3 - up from 105.2 in May. Consumer sentiment regarding current living standards was unchanged, at 93, while the outlook was two points higher at 95. Consumer sentiment related to future household income was two points higher at 100, while the outlook was five points higher at 113.

## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	52699.00	392.92	0.75
NIFTY	15790.45	103.50	0.66
MIDCAP	22320.39	-114.26	-0.51
SMLCAP	24896.86	-55.76	-0.22
BSEFMC	13533.47	33.24	0.25
AUTO	23751.91	65.23	0.28
POWER	2812.21	-31.39	-1.10
REALTY	2750.86	-21.90	-0.79
BSE IT	29875.51	846.44	2.92
BANKEK	39427.30	297.56	0.76
OIL GAS	16677.25	-297.78	-1.75
METAL	18195.89	128.59	0.71
INDIA VIX	15.10	-0.27	-1.74

## ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	778	1184	58
BSE	1410	1799	141

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	4429	12928	(66)
NSE CASH	63681	64386	(1)
NSE F&O	8099901	5270239	54

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	29.08	4.32	1.22
SENSEX	32.16	3.40	1.03

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

FII-DII*	Buy	Sell	Net
DII	5378	4239	1139
FII	7094	9985	(2891)

Note: FII & DII Figures are provisional

## FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	9059.99	7280.05	1780
Index Options	729209.51	738020.99	(8811)
Stock Futures	28766.02	28789.32	(23)
Stock Options	8471.12	7079.26	1392

## PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.16	0.96
BANK NIFTY	0.92	0.68

## SECURITIES BAN FOR TRADE IN F&O FOR 25-06-2021

NIL
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## 10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.012	6.018	-0.10
USA	1.489	1.487	0.10

## DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	91.72	91.80	-0.09

## CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
28 June - 21 USD-INR	74.20	-0.10	-0.14
28 June - 21 EUR-INR	88.58	-0.18	-0.21
28 June - 21 GBP-INR	103.33	-0.38	-0.37
28 June - 21 JPY- INR	66.98	0.04	0.06

## KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1784.58	7.21	0.40
Silver	26.11	0.25	0.98
Crude-Oil	72.92	-0.16	-0.22
Brent-Crude	75.17	-0.05	-0.05

## INDEX TREND ANALYSIS

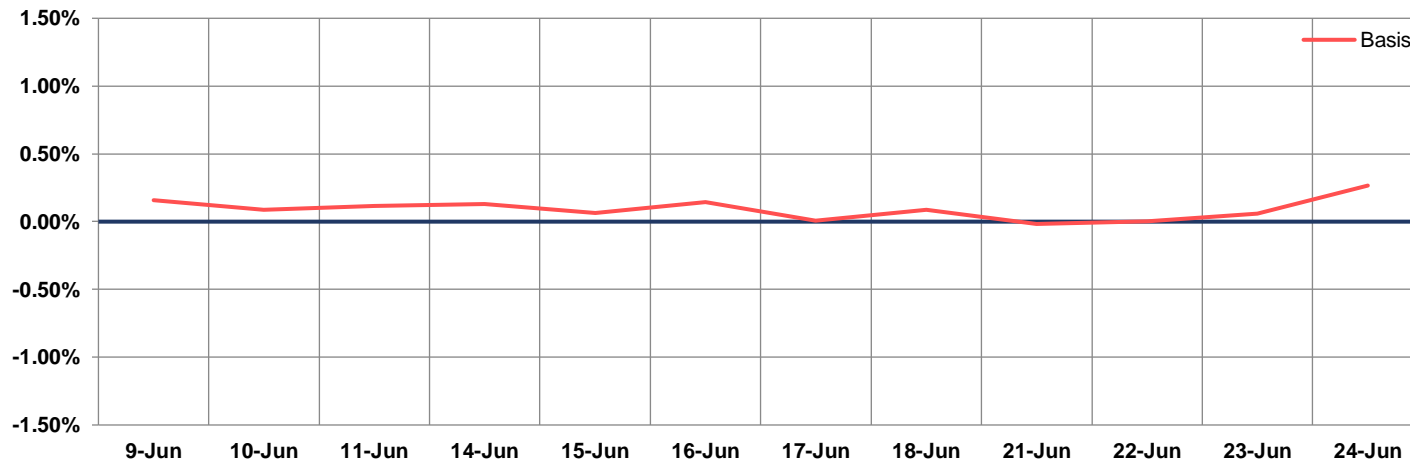
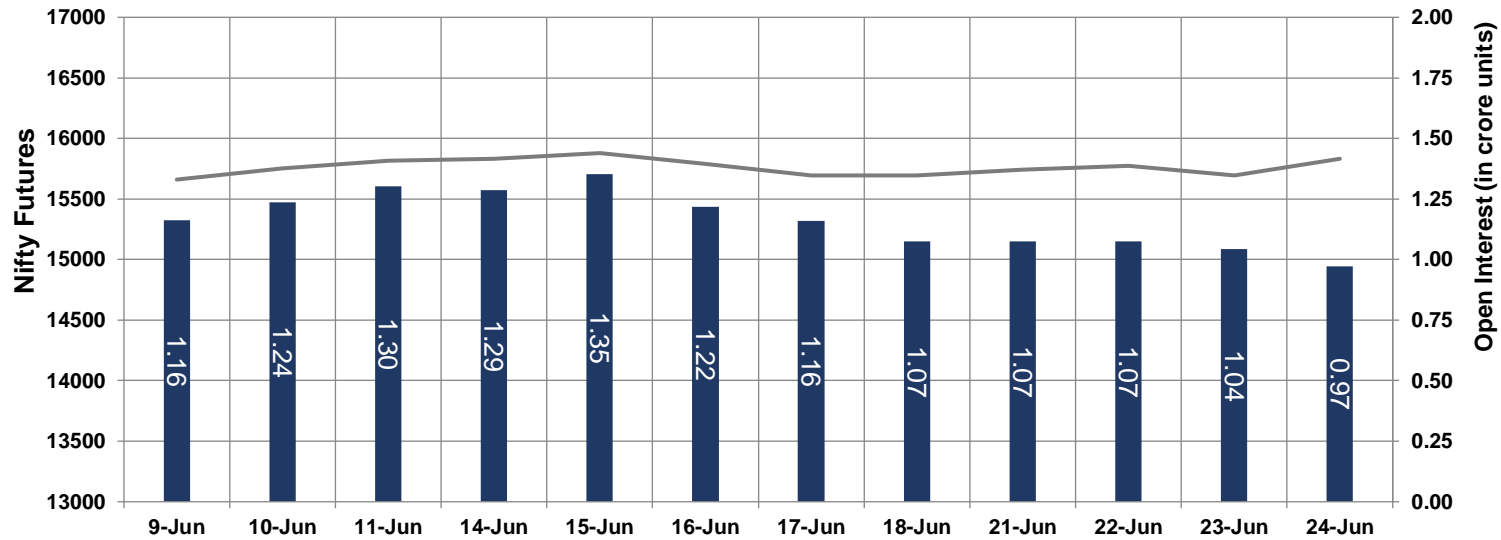
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	15790	15653	15722	15772	15840	15890	Buy	Buy	Buy
SENSEX	52699	52193	52446	52638	52891	53084	Buy	Buy	Buy
NIFTY FUTURES	15790	15633	15712	15766	15844	15898	Buy	Buy	Buy
BANK NIFTY	34827	34442	34634	34785	34977	35128	Neutral	Neutral	Buy
CNX IT	29048	28093	28571	28835	29312	29576	Buy	Neutral	Buy
CNX MIDCAP	26601	26406	26504	26628	26726	26850	Neutral	Buy	Buy
CNX SMALLCAP	9639	9567	9603	9651	9688	9736	Neutral	Buy	Buy
INDIA VIX	15.10	14.50	14.80	15.22	15.52	15.94	Neutral	Sell	Neutral

## NIFTY TECHNICAL & INDICES LEVEL

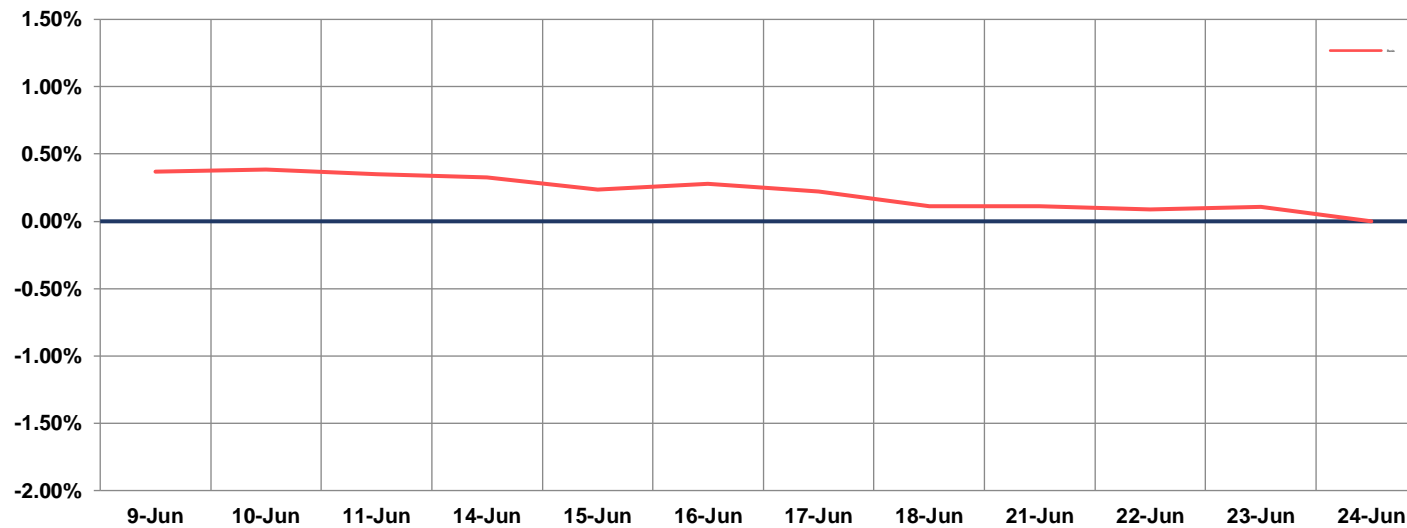
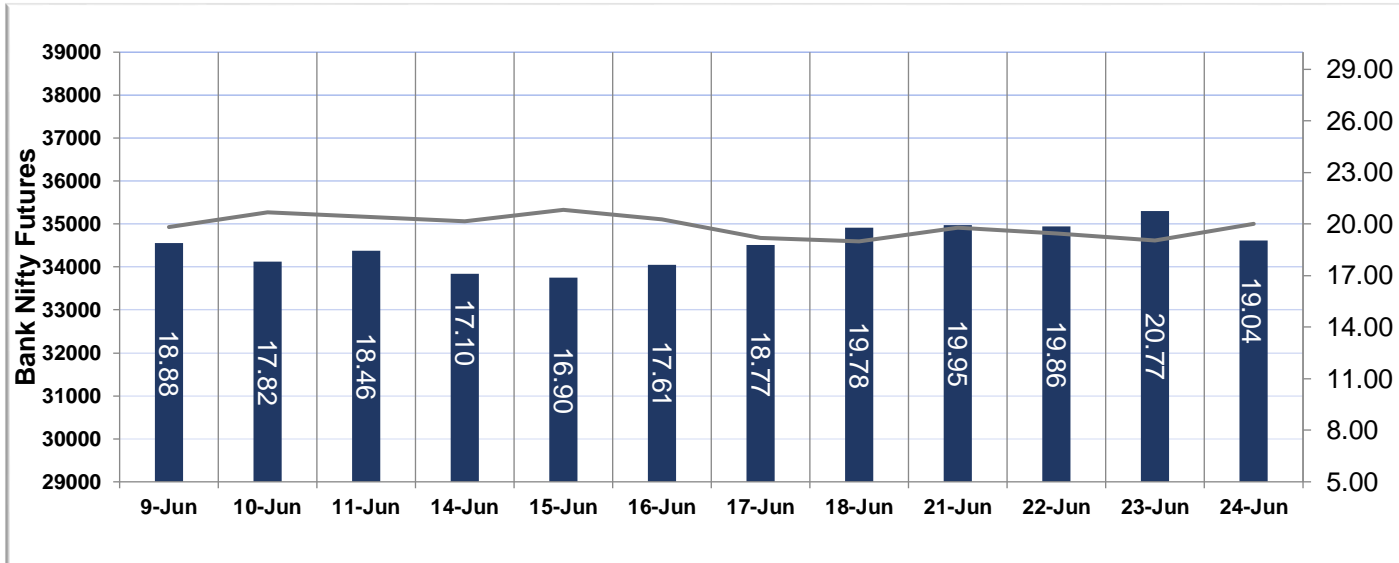


- Nifty Cash prices have settled at **15790.45** up by 0.66 percent from the previous close. On the upper side it has resistance of **15880** and **15960** levels, while lower side it has support of **15680** and **15530** levels. Intraday traders should be cautious and take position accordingly.

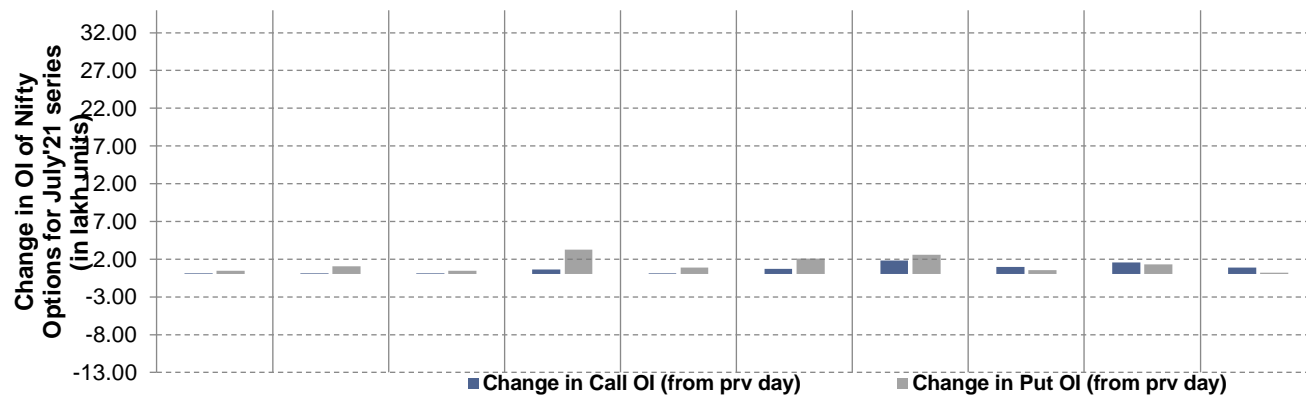
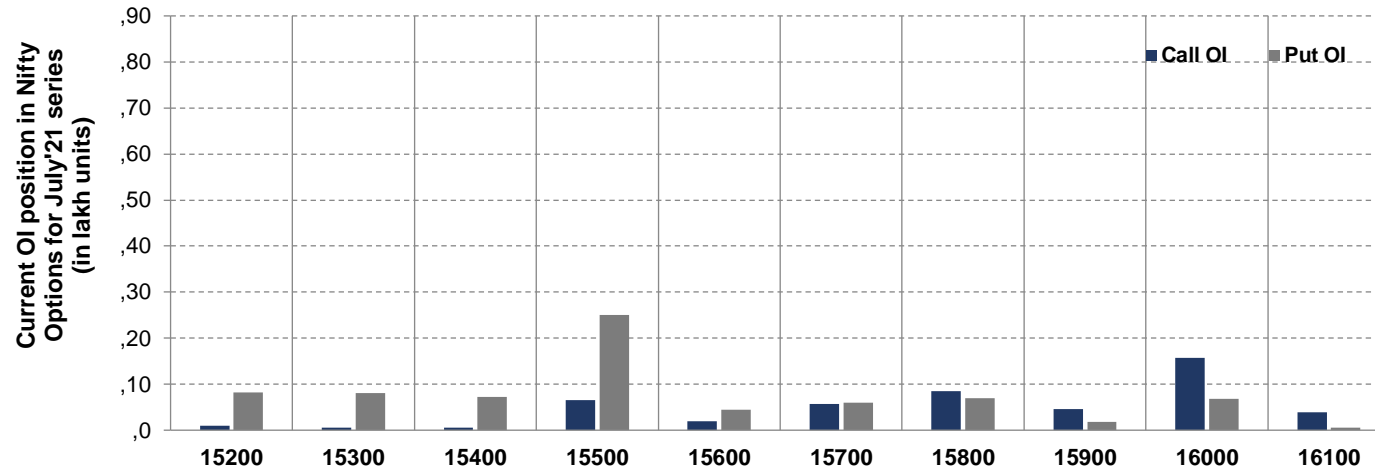
## NIFTY FUTURES



## BANK NIFTY FUTURES



## NIFTY OPTIONS



- Among Nifty calls 16,000 SP from the July month expiry was the most active call with an addition of 0.16 million in open interests.
- Among Nifty puts 15,500 SP from the July month expiry was the most active put with an addition of 0.33 million in open interests.
- The maximum OI outstanding for Calls was at 16,000 SP (1.60mn) and that for Puts was at 15,500 SP (2.50mn)



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