

# Morning Mantra

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

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## Table of Contents

Page No.	Particulars
1	Market Commentary
2	Market Summary and Numbers that matter
3	G-Sec Yields, Currency Futures, Dollar Index, Key Commodities Tracker & Index Trend Analysis
4	Nifty Technical
5	Nifty Futures
6	Bank Nifty Futures
7	Nifty Options
8	Disclaimer

## MARKET COMMENTARY

Indian equity benchmarks ended higher on Friday. After a positive start, markets remained volatile during morning deals. Traders were worried as India reported on Thursday 54,069 new Covid-19 infections over the past 24 hours, data from the health ministry showed. It had 1,321 new fatalities, taking the total death toll to 39,1981. But, indices managed to trade in green for the most part of the trading session, taking support with Crisil's report that States' revenues is set to cross the Pre-Covid pandemic level in the current fiscal (FY22), driven by higher tax buoyancy, rise in sales tax collections from petroleum products coupled with increase in grants following 15th Finance Commission recommendations. It noted that revenue of the top 10 states had plunged 600 basis points (bps) last fiscal.

Traders remained positive during the trading session, as industry body -- the National Association of Software and Service Companies (Nasscom) has said that India's share in the global engineering and research and development (ER&D) market is likely to grow at a compound annual growth rate (CAGR) of 12-13 per cent to reach \$63 billion by 2025. Nasscom President Debjani Ghosh noted that the pandemic has altered the way consumers behave, interact with companies, and how businesses interact. She said ccontactless technologies, analytics, software-led systems are changing how products are designed, redesigned, engineered, and consumed.

On the global front, European markets were trading mostly in red. Asian markets ended with a strong note on Friday, after Malaysia's consumer prices inflation eased in May. The data from the Department of Statistics showed that consumer price inflation eased to 4.4 percent in May from 4.7 percent in April. The annual growth was largely driven by the rise in prices of transport by 26.0 percent. Prices for housing, water, electricity, gas and other fuels rose 3.2 percent. Prices for furnishings, households equipment and routine household maintenance rose 2.1 percent and prices for food and non-alcoholic beverages gained 1.5 percent.

## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	52925.04	226.04	0.43
NIFTY	15860.35	69.90	0.44
MIDCAP	2254965	229.26	1.03
SMLCAP	24996.23	99.37	0.40
BSEFMC	13467.25	-66.22	-0.49
AUTO	23967.21	215.30	0.91
POWER	2800.20	-12.01	-0.43
REALTY	2762.17	11.31	0.41
BSE IT	30055.62	180.11	0.60
BANEX	40026.43	599.13	1.52
OIL GAS	16504.45	-172.80	-1.04
METAL	18703.89	508.00	2.79
INDIA VIX	13.37	-1.73	-11.46

## ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	1068	900	62
BSE	1747	1468	130

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	5072	4429	15
NSE CASH	63723	63681	0
NSE F&O	2461957	8099901	(70)

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	29.21	4.34	1.21
SENSEX	32.31	3.41	1.02

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

FII-DII*	Buy	Sell	Net
DII	6844	5011	1833
FII	6766	7445	(679)

Note: FII & DII Figures are provisional

## FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	2823.55	3681.27	(858)
Index Options	250451.65	250598.66	(147)
Stock Futures	13241.95	13198.45	44
Stock Options	11500.52	11797.57	(297)

## PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.20	1.16
BANK NIFTY	1.08	0.92

## SECURITIES BAN FOR TRADE IN F&O FOR 28-06-2021

NIL
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## 10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.034	6.012	0.37
USA	1.492	1.487	0.32

## DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	91.78	91.81	-0.04

## CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
28 June - 21 USD-INR	74.22	0.02	0.03
28 June - 21 EUR-INR	88.66	0.04	0.05
28 June - 21 GBP-INR	103.47	-0.18	-0.17
28 June - 21 JPY- INR	67.04	0.05	0.08

## KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1776.57	1.34	0.08
Silver	26.01	0.08	0.30
Crude-Oil	74.11	0.81	1.11
Brent-Crude	76.10	0.56	0.74

## INDEX TREND ANALYSIS

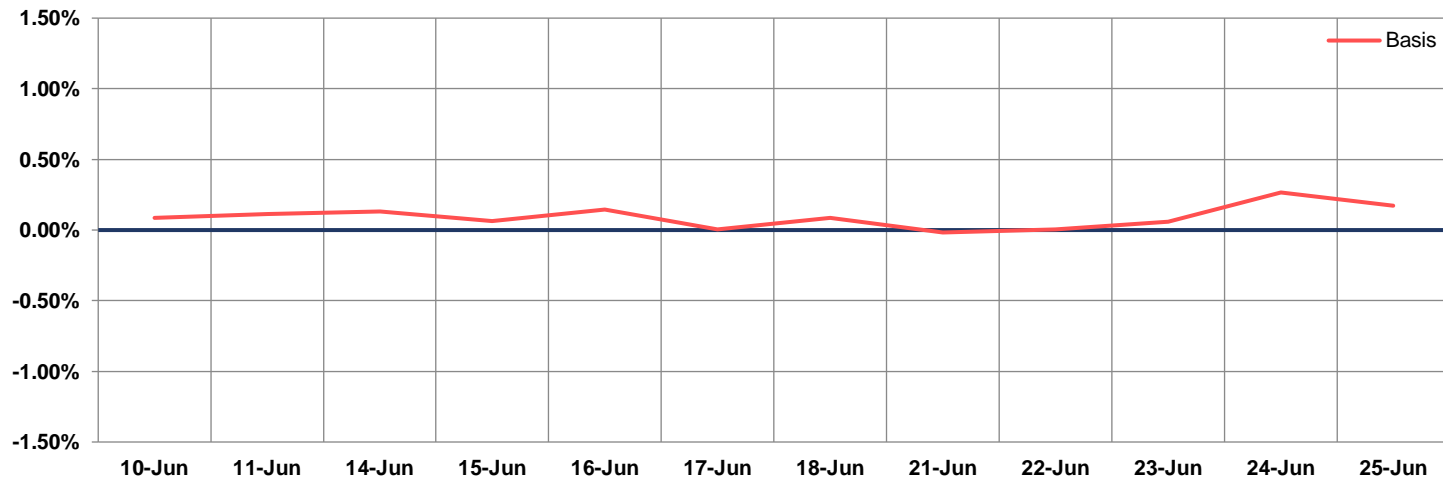
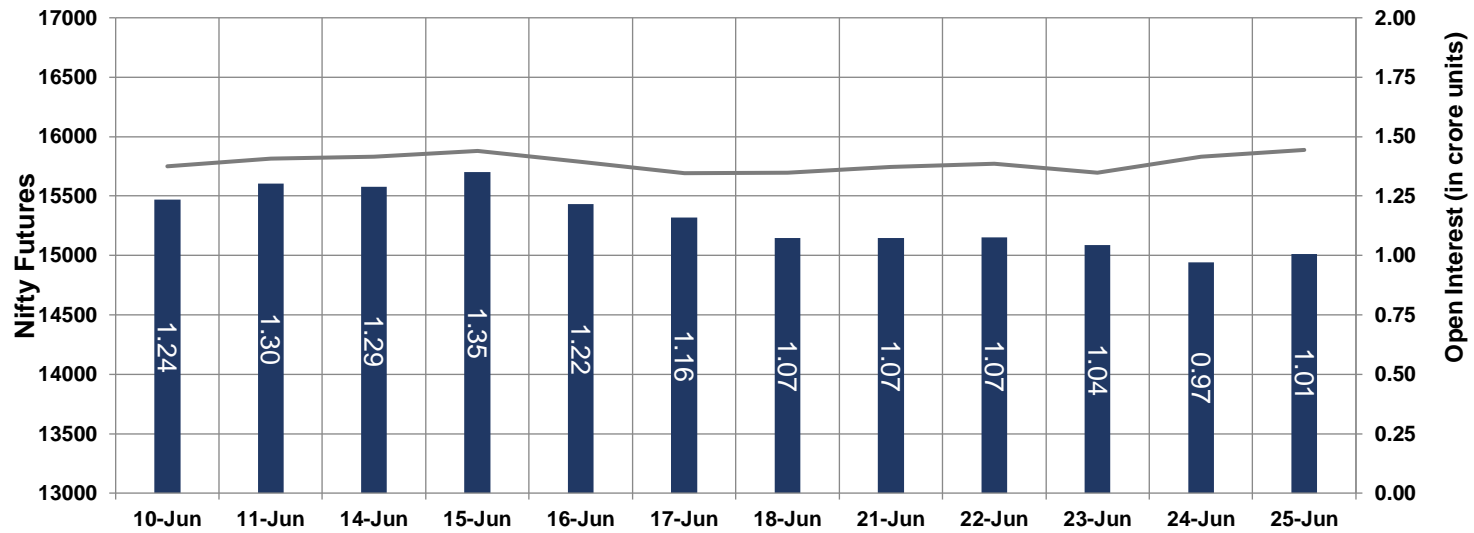
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	15860	15736	15798	15834	15897	15933	Buy	Buy	Buy
SENSEX	52925	52479	52702	52838	53061	53196	Buy	Buy	Buy
NIFTY FUTURES	15880	15763	15821	15861	15919	15959	Buy	Buy	Buy
BANK NIFTY	35347	34675	35011	35251	35587	35828	Buy	Buy	Buy
CNX IT	29204	28711	28957	29121	29367	29530	Buy	Buy	Buy
CNX MIDCAP	26896	26589	26742	26837	26991	27086	Buy	Buy	Buy
CNX SMALLCAP	9691	9643	9667	9688	9711	9732	Buy	Buy	Buy
INDIA VIX	13.37	11.98	12.68	13.97	14.67	15.96	Sell	Sell	Neutral

## NIFTY TECHNICAL & INDICES LEVEL

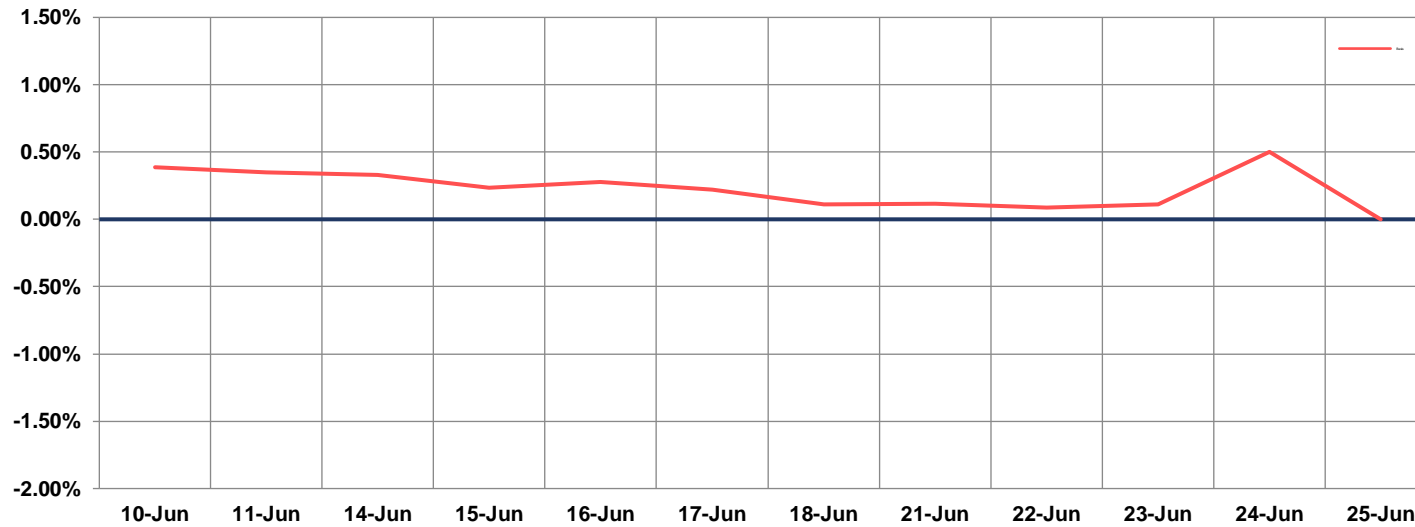
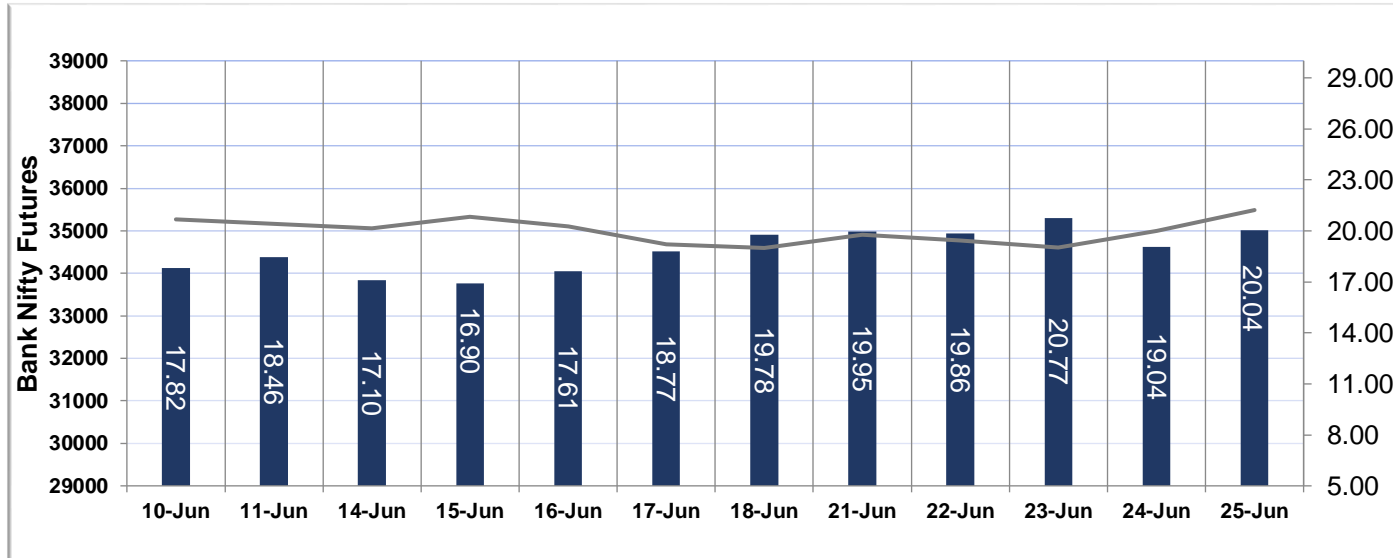


- Nifty Cash prices have settled at **15860.35** up by 0.44 percent from the previous close. On the upper side it has resistance of **15940** and **16040** levels, while lower side it has support of **15770** and **15680** levels. Intraday traders should be cautious and take position accordingly.

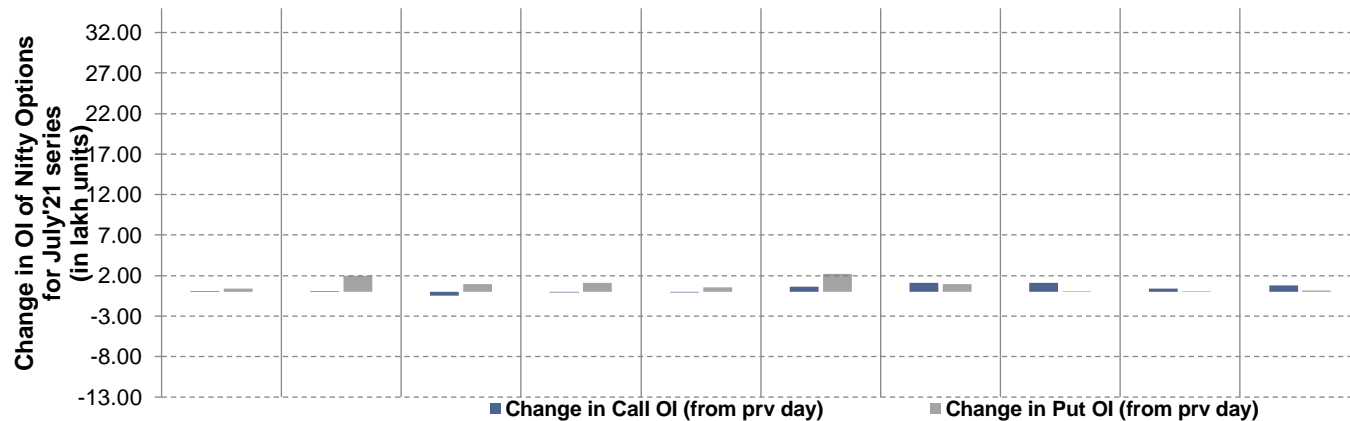
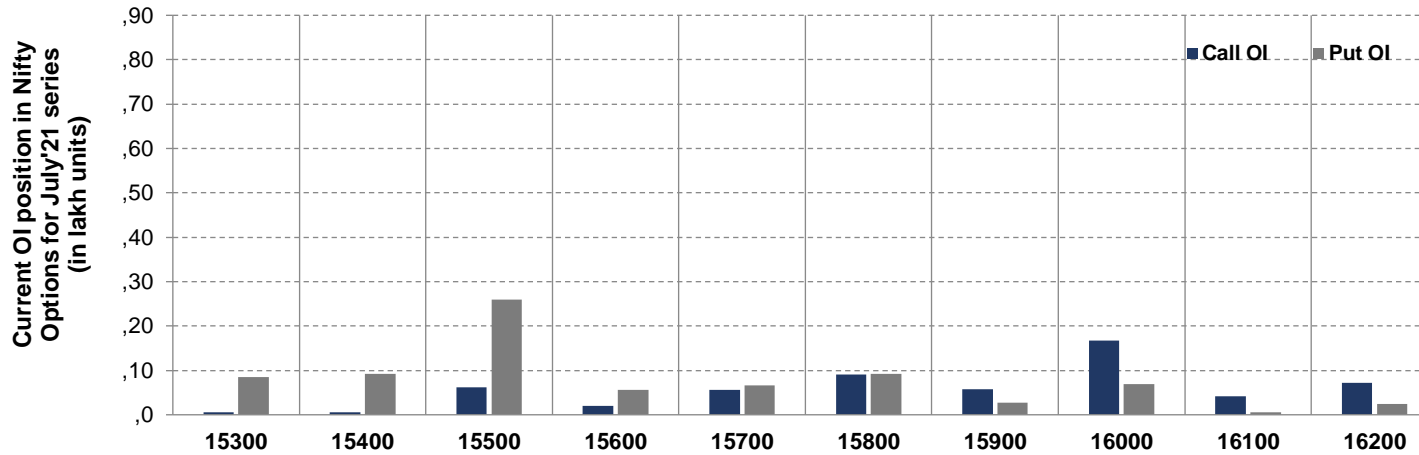
## NIFTY FUTURES



## 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 0.11 million in open interests.
- Among Nifty puts 15,500 SP from the July month expiry was the most active put with an addition of 0.10 million in open interests.
- The maximum OI outstanding for Calls was at 16,000 SP (1.70mn) and that for Puts was at 15,500 SP (2.60mn)



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