

# Morning Mantra

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

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## MARKET COMMENTARY

Indian equity benchmarks ended lower on Monday. The start of the day was on a positive note, as fall in coronavirus cases aided the sentiments in the markets. India recorded 46,643 cases in the last 24 hours, lowest since March 24, taking the country's total coronavirus caseload to 30,278,963. Adding more optimism, Economic think-tank NCAER expects the Indian economy to grow 8.4-10.1 percent for the current financial year as against a contraction of 7.3 percent in the last fiscal.

But soon, markets turned negative, as the government's total liabilities stood at Rs 116.21 lakh crore at the end of March 2021, up 6.36 per cent from the previous quarter. The total liabilities (including liabilities under the Public Account) of the government were Rs 109.26 lakh crore at end-December 2020. Also, RBI data showed that sliding from a lifetime high, India's forex reserves declined by \$4.148 billion to reach \$603.933 billion for the week ended June 18 due to a fall in gold and currency assets.

Key indices remained lower for the most part of the trading session and finally ended in red. Sentiments were negative as India Ratings and Research (Ind-Ra) said its earlier estimate of gross domestic product (GDP) growth at 10.1 per cent for the current financial year (FY22) is unlikely to hold due to the speed and scale of Covid 2.0. It now expects GDP growth to come in at 9.6 per cent in FY22. This is however contingent upon India vaccinating its entire adult population by December 31.

On the global front, European markets were trading lower with travel shares slumping amid restrictions prompted by Covid-19 strains, while U.S. futures were little changed alongside Asian equities. Asian markets ended mostly lower on Monday, even after Singapore's industrial production accelerated in May. The data from the Economic Development Board showed that industrial output surged 30.0 percent year-on-year in May, following a 2.3 percent rise in March. Production was forecast to increase 23.6 percent. Excluding biomedical manufacturing, industrial production grew 29.0 percent yearly in May, following a 11.3 percent rise in the preceding month.

## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	52735.59	-189.45	-0.36
NIFTY	15814.70	-45.65	-0.29
MIDCAP	22638.82	89.17	0.40
SMLCAP	25111.36	115.13	0.46
BSEFMC	13495.81	28.56	0.21
AUTO	23986.40	19.19	0.08
POWER	2789.32	-10.88	-0.39
REALTY	2764.56	2.39	0.09
BSE IT	29922.19	-133.43	-0.44
BANEX	40017.63	-8.80	-0.02
OIL GAS	16457.36	-47.09	-0.29
METAL	18941.60	237.71	1.27
INDIA VIX	13.40	0.04	0.26

## ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	1067	938	65
BSE	1821	1504	149

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	5022	5072	(1)
NSE CASH	58256	63723	(9)
NSE F&O	2956114	2461957	20

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	29.12	4.33	1.22
SENSEX	32.19	3.40	1.03

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

FII-DII*	Buy	Sell	Net
DII	5634	4357	1277
FII	4276	5934	(1659)

Note: FII & DII Figures are provisional

## FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	2735.42	3464.18	(729)
Index Options	266552.93	265132.30	1421
Stock Futures	10770.65	11829.31	(1059)
Stock Options	9844.05	9690.32	154

## PUT-CALL RATIO

Index	Current	Previous
NIFTY	0.99	1.20
BANK NIFTY	0.83	1.08

## SECURITIES BAN FOR TRADE IN F&O FOR 29-06-2021

NATIONALUM
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## 10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.065	6.028	0.61
USA	1.512	1.536	-1.56

## DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	91.83	91.81	0.02

## CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
28 July -21 USD-INR	74.43	-0.02	-0.02
28 July -21 EUR-INR	88.82	-0.12	-0.13
28 July -21 GBP-INR	103.45	-0.03	-0.03
28 July -21 JPY- INR	67.20	-0.04	-0.05

## KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1779.87	1.24	0.07
Silver	26.12	0.06	0.26
Crude-Oil	73.33	-0.85	-1.12
Brent-Crude	75.30	-0.88	1.16

## INDEX TREND ANALYSIS

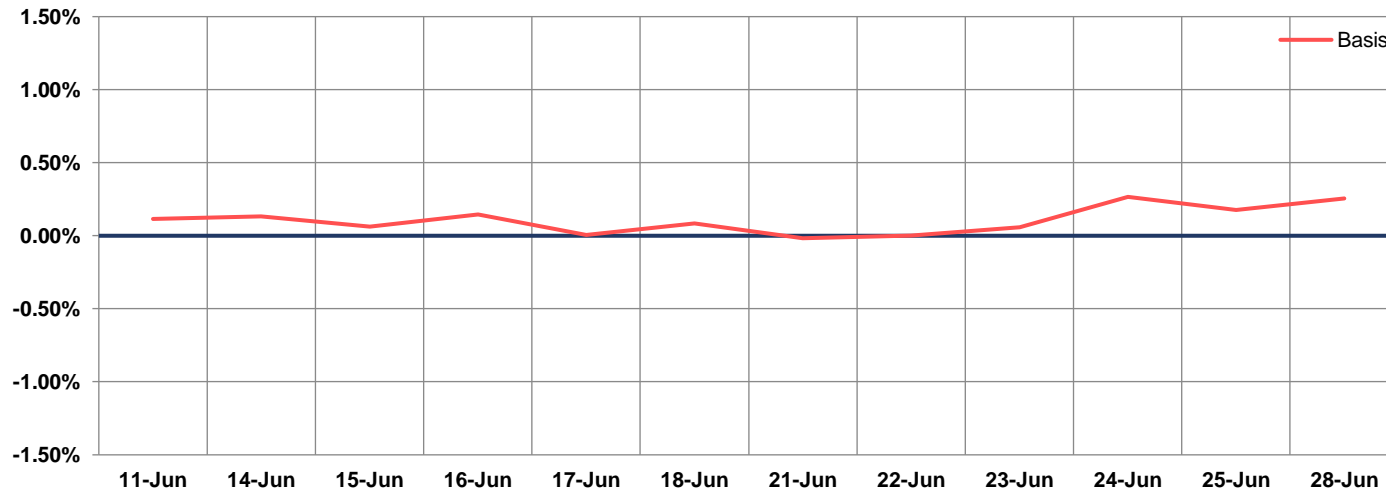
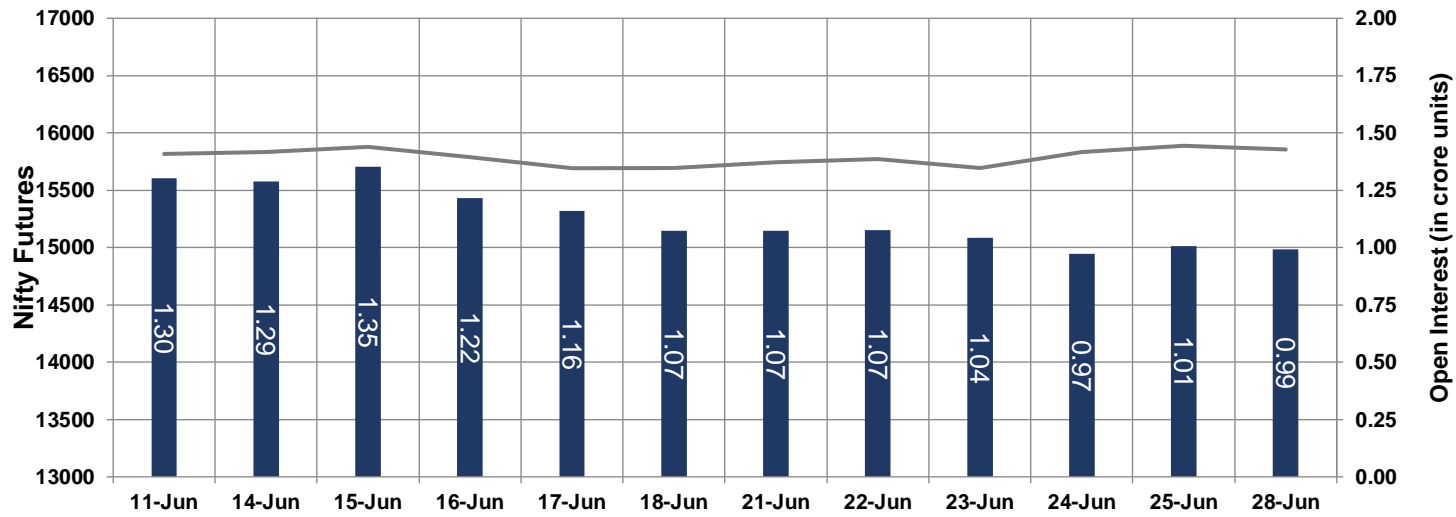
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	15815	15717	15766	15841	15890	15964	Buy	Buy	Buy
SENSEX	52736	52392	52564	52845	53017	53299	Buy	Buy	Buy
NIFTY FUTURES	15862	15768	15815	15872	15919	15977	Buy	Buy	Buy
BANK NIFTY	35359	35050	35205	35391	35545	35731	Buy	Buy	Buy
CNX IT	29069	28820	28944	29102	29226	29384	Buy	Buy	Buy
CNX MIDCAP	27037	26843	26940	27003	27100	27164	Buy	Buy	Buy
CNX SMALLCAP	9727	9690	9708	9731	9749	9772	Buy	Buy	Buy
INDIA VIX	13.40	12.78	13.09	13.43	13.74	14.08	Sell	Sell	Neutral

## NIFTY TECHNICAL & INDICES LEVEL

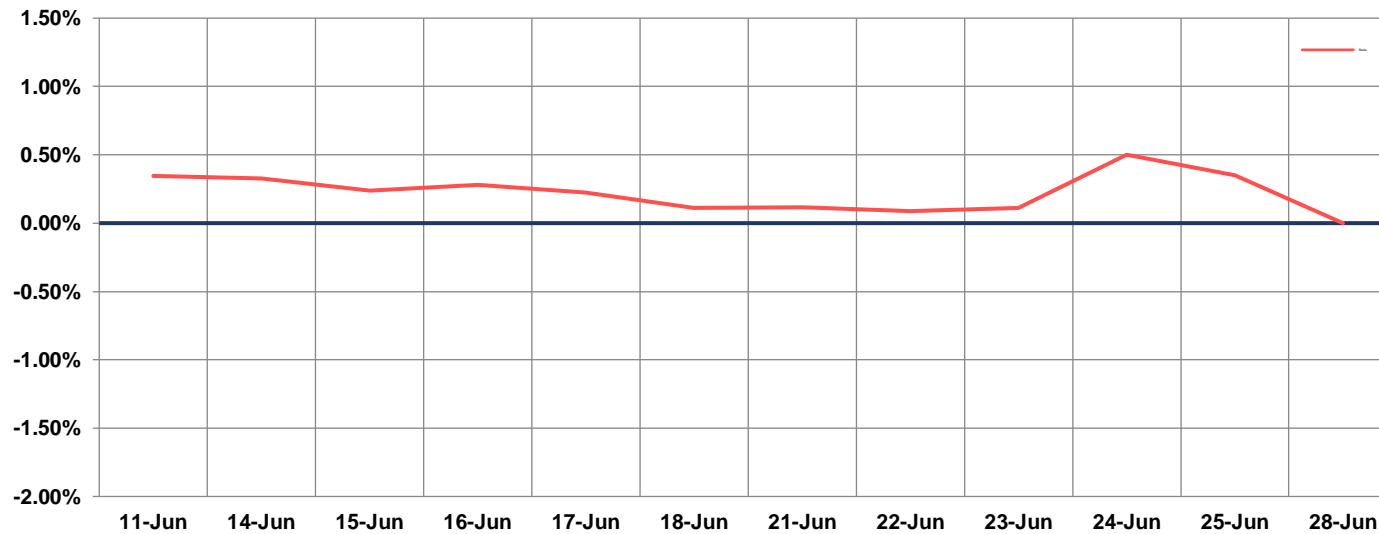
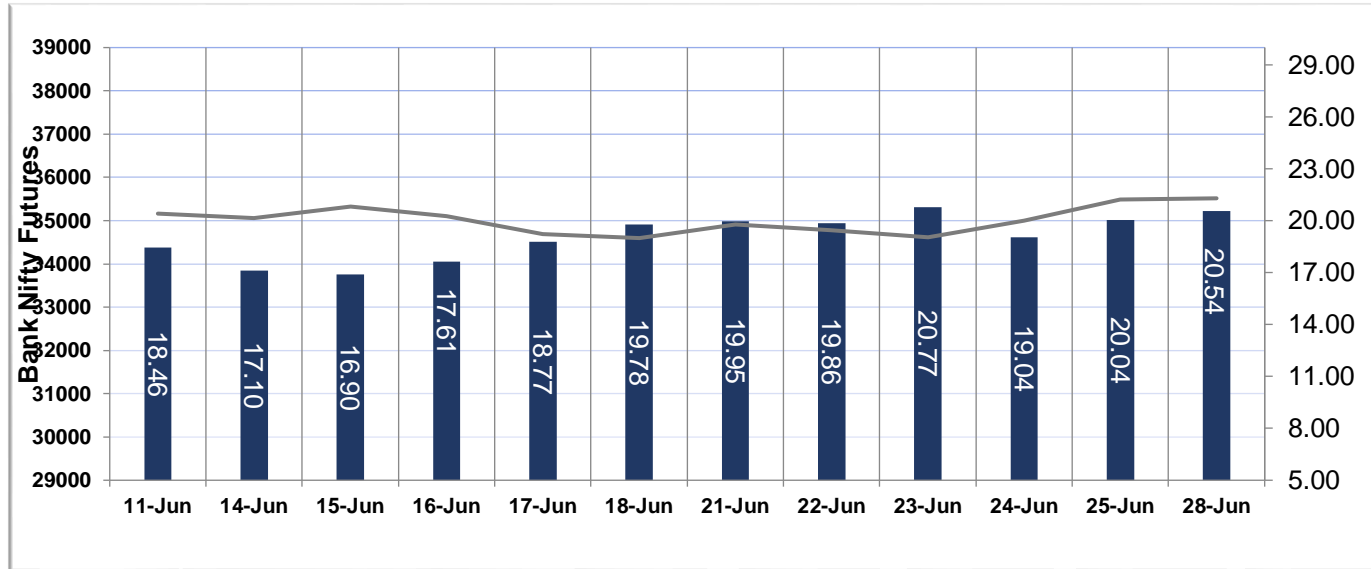


- Nifty Cash prices have settled at **15814.70** down by 0.29 percent from the previous close. On the upper side it has resistance of **15940** and **16040** levels, while lower side it has support of **15770** and **15630** levels. Intraday traders should be cautious and take position accordingly.

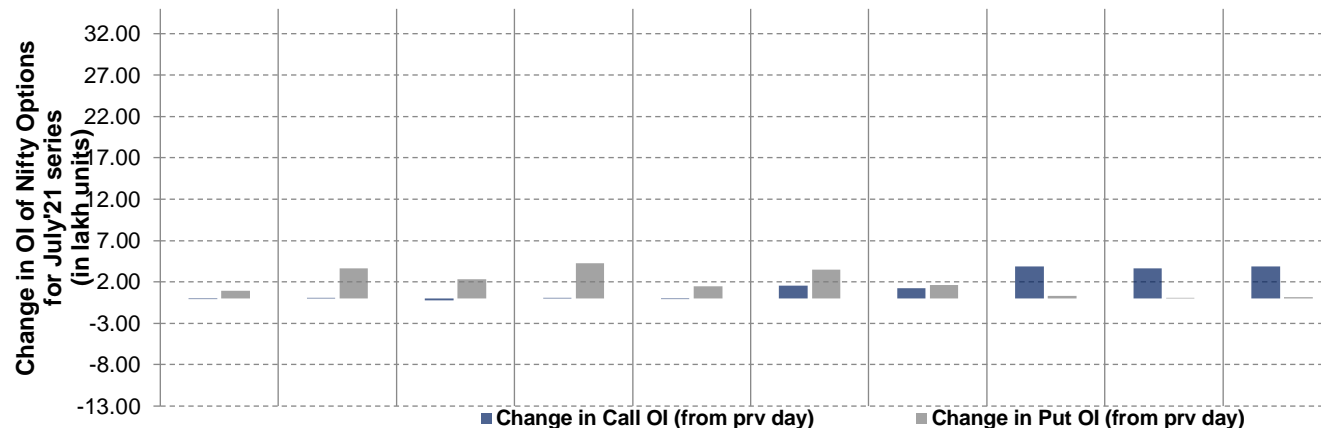
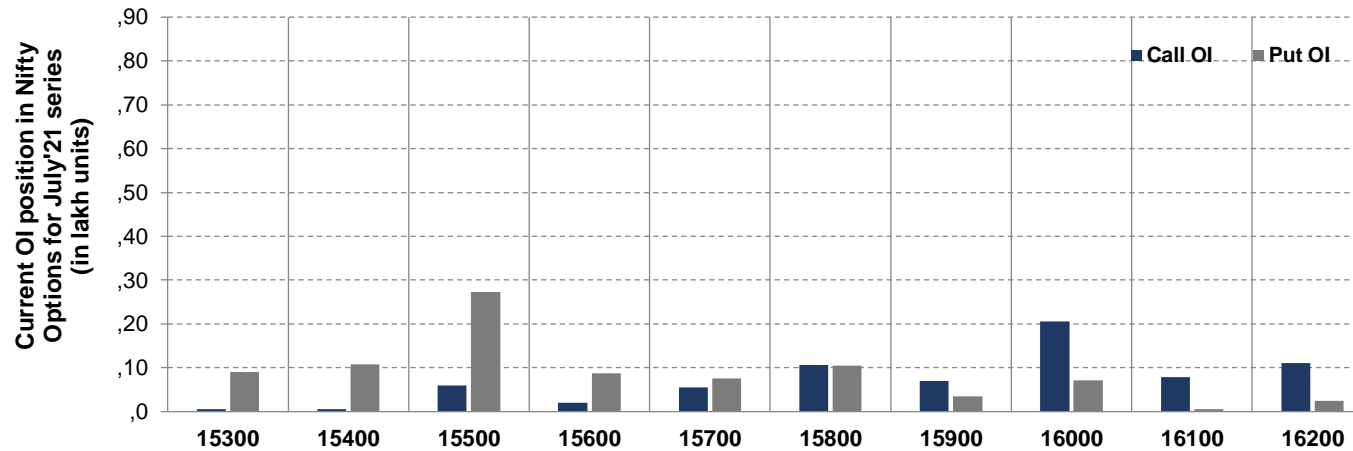
## NIFTY FUTURES



## 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 0.40 million in open interests.
- Among Nifty puts 15,500 SP from the July month expiry was the most active put with an addition of 0.23 million in open interests.
- The maximum OI outstanding for Calls was at 16,000 SP (2.10mn) and that for Puts was at 15,500 SP (2.73mn)



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