

Morning Mantra

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

ISO 9001 : 2015 Certified



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 with losses on Tuesday. After a cautious start, indices traded in green during early morning deals, as Union Finance Minister Nirmala Sitharaman announced the much-awaited fiscal package to revive the economy ravaged by the second pandemic wave, keeping the fiscal outgo limited for the current year. Additionally, witnessing a sharp decline, India recorded 37,037 fresh Covid-19 cases in the last 24 hours with 907 fatalities, Worldometer showed.

But soon, markets turned negative and remained lower for the whole trading session. Traders were concerned as S&P Global cut its growth forecasts for some of Asia's top economies including India, the Philippines and Malaysia, offsetting upgrades to China and South Africa and much of Latin America. The estimates, which feed into S&P's closely-followed sovereign ratings, saw India's growth projection chopped to 9.5% from 11% due to its COVID-19 outbreak.

Investors maintained cautious approach during the trading session, as unemployment rate came down further to 8.72% for the week ended June 27 from 9.35% in the previous week, but still remained higher than 8.16% recorded at the beginning of the second Covid-19 wave in early April. The unemployment rate has fallen on a fallen labour participation rate (LPR). The LPR fell from 40.5% in the previous week to 39.6%.

In the last hours of the trade, key indices added more losses and finally ended the trading day on a lower note. Domestic sentiments remained downbeat with a domestic rating agency ICRA stating that nearly a third of loans by NBFCs are in risky segments, and the already elevated non-performing assets ratio for such lenders are expected to rise by up to 1 percent in FY22 due to the impact of the second COVID-19 wave.

On the global front, European markets were trading higher. Asian markets settled mostly lower on Tuesday, after Hong Kong's merchandise exports grew at a softer pace in May. The data from the Census and Statistics Department showed that exports rose 24.0 percent year-on-year in May, after a 24.4 percent increase in April. Imports gained 26.5 percent annually in May, following a 25.2 percent increase in the previous month.

MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	52549.66	-185.93	-0.35
NIFTY	15748.45	-66.25	-0.42
MIDCAP	22542.80	-96.02	-0.42
SMLCAP	25092.69	-18.67	-0.07
BSEFMC	13570.45	74.64	0.55
AUTO	23742.47	-243.93	-1.02
POWER	27810.81	-8.51	-0.31
REALTY	2752.39	-12.17	-0.44
BSE IT	29875.12	-47.07	-0.16
BANKEX	39593.03	-424.60	-1.06
OIL GAS	16257.03	-200.33	-1.22
METAL	18686.04	-255.56	-1.35
INDIA VIX	12.90	-0.50	-2.98

ADVANCE-DECLINE

Index	Advance	Decline	Unchanged
NSE	902	1083	56
BSE	1587	1639	125

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	13508	5022	169
NSE CASH	63288	58256	9
NSE F&O	3464779	2956114	17

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	29.00	4.31	1.26
SENSEX	32.04	3.39	1.03

FII & DII - CAPITAL MARKETS (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	8687	6877	1810
FII	10932	10815	117

Note: FII & DII Figures are provisional

FII DERIVATIVES (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	2329.52	3630.34	(1301)
Index Options	283451.42	278774.48	4677
Stock Futures	11353.93	12530.68	(1177)
Stock Options	8551.18	8789.45	(238)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	0.90	0.99
BANK NIFTY	0.63	0.83

SECURITIES BAN FOR TRADE IN F&O FOR 30-06-2021

NATIONALUM

10-YEAR GOVERNMENT SECURITIES YIELD

Country	Current	Previous	% Chg
INDIA	6.041	6.056	-0.25
USA	1.492	1.478	0.93

DOLLAR INDEX

Dollar Index	Current	Previous	% Chg
DXY	92.15	91.89	0.29

CURRENCY FUTURES

Expiry	Close	Chg Point	% Chg
28 July -21 USD-INR	74.49	0.06	0.08
28 July -21 EUR-INR	88.68	-0.15	-0.17
28 July -21 GBP-INR	103.06	-0.42	-0.40
28 July -21 JPY- INR	67.37	0.16	0.25

KEY COMMODITIES TRACKER

Commodity	Current	Chg Point	% Chg
Gold	1755.36	-22.61	-1.28
Silver	25.68	-0.42	-1.61
Crude-Oil	73.28	0.37	0.51
Brent-Crude	75.07	0.39	0.52

INDEX TREND ANALYSIS

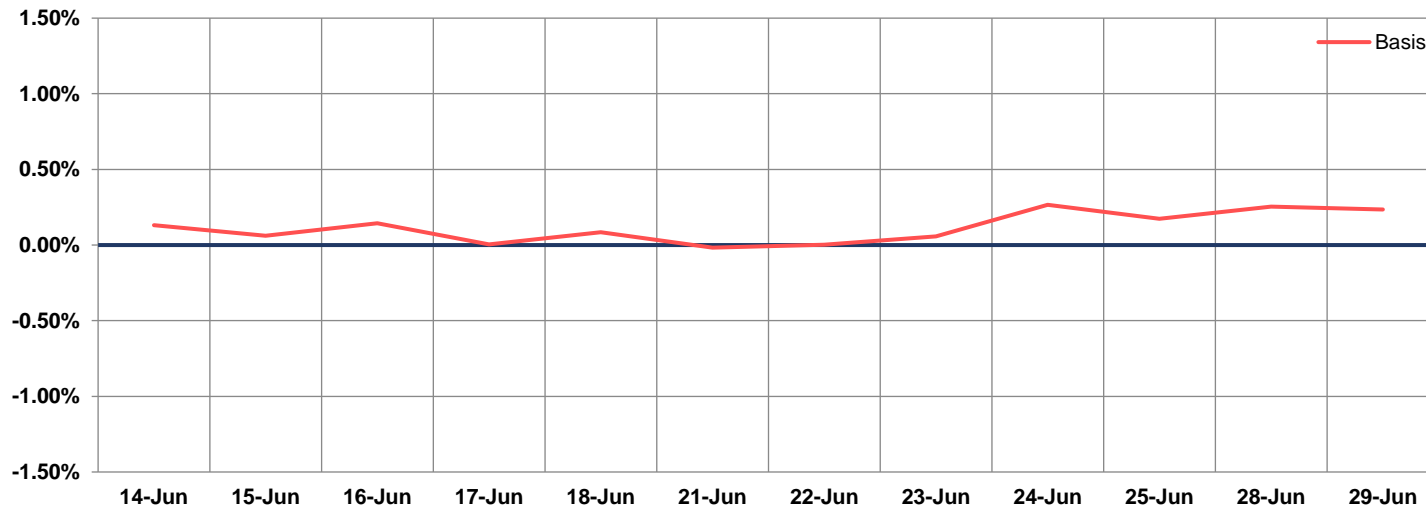
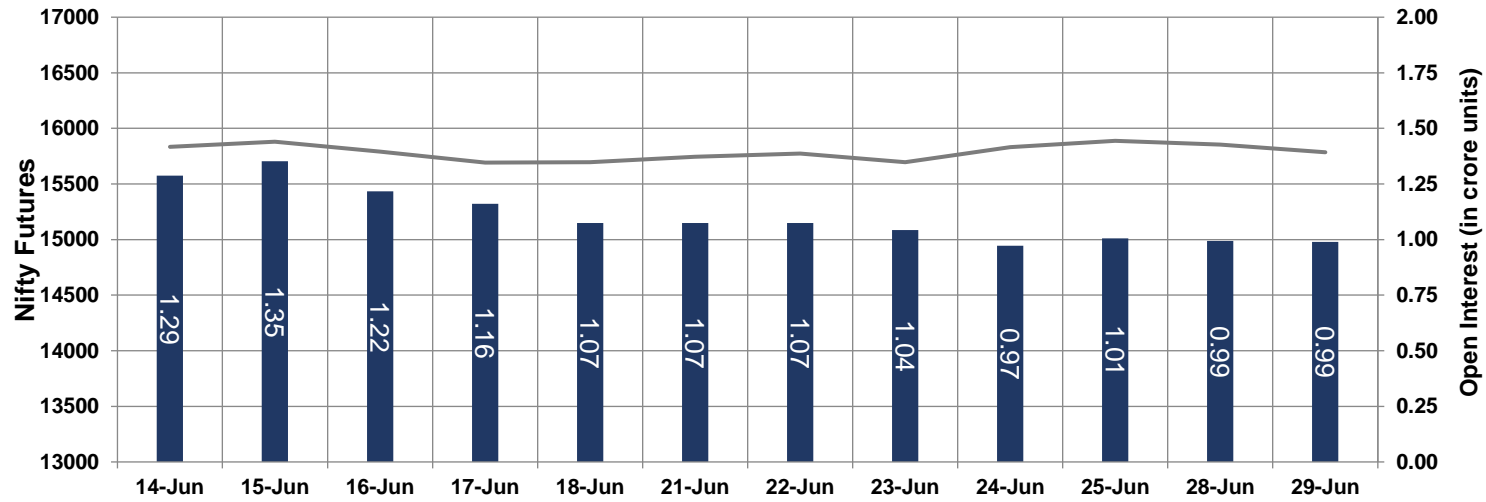
INDEX	CLOSE	S2	S1	PIVOT	R1	R2	DAILY	WEEKLY	MONTHLY
NIFTY	15748	15658	15703	15769	15815	15881	Neutral	Buy	Buy
SENSEX	52550	52276	52413	52615	52751	52953	Neutral	Buy	Buy
NIFTY FUTURES	15795	15703	15749	15805	15850	15906	Neutral	Buy	Buy
BANK NIFTY	35010	34663	34837	35087	35261	35511	Neutral	Buy	Buy
CNX IT	28986	28785	28886	29035	29135	29284	Buy	Buy	Buy
CNX MIDCAP	26901	26670	26786	26951	27066	27232	Buy	Buy	Buy
CNX SMALLCAP	9713	9647	9680	9732	9765	9818	Buy	Buy	Buy
INDIA VIX	13.00	12.60	12.80	13.10	13.30	13.60	Sell	Sell	Neutral

NIFTY TECHNICAL & INDICES LEVEL

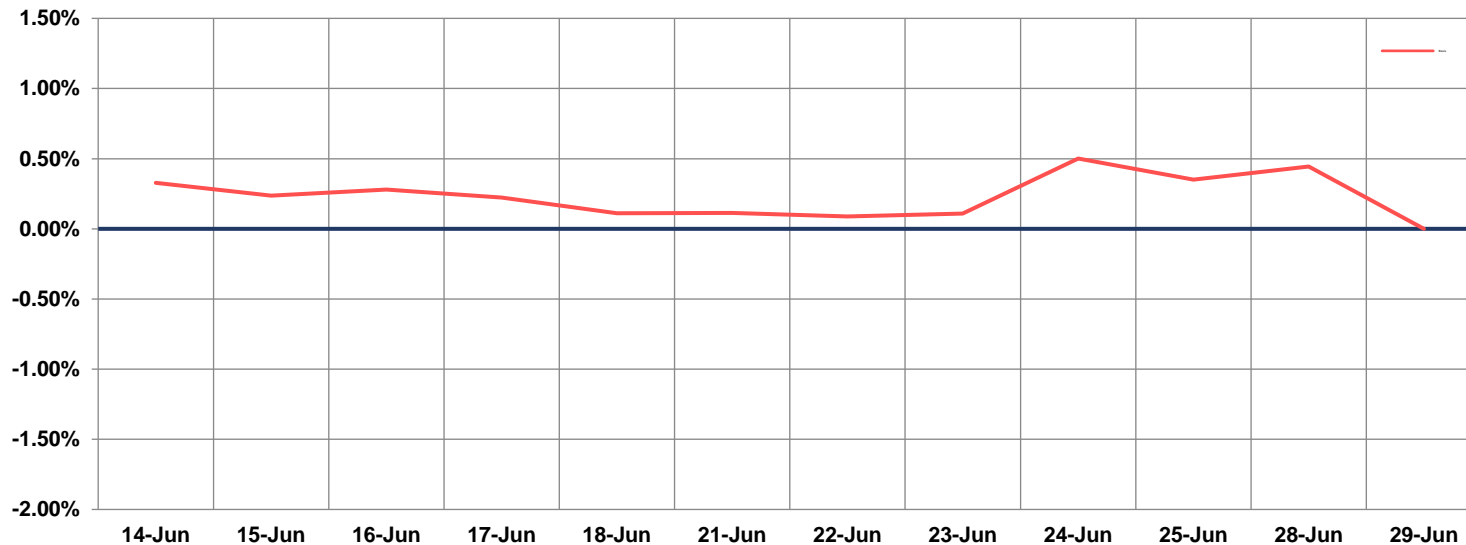
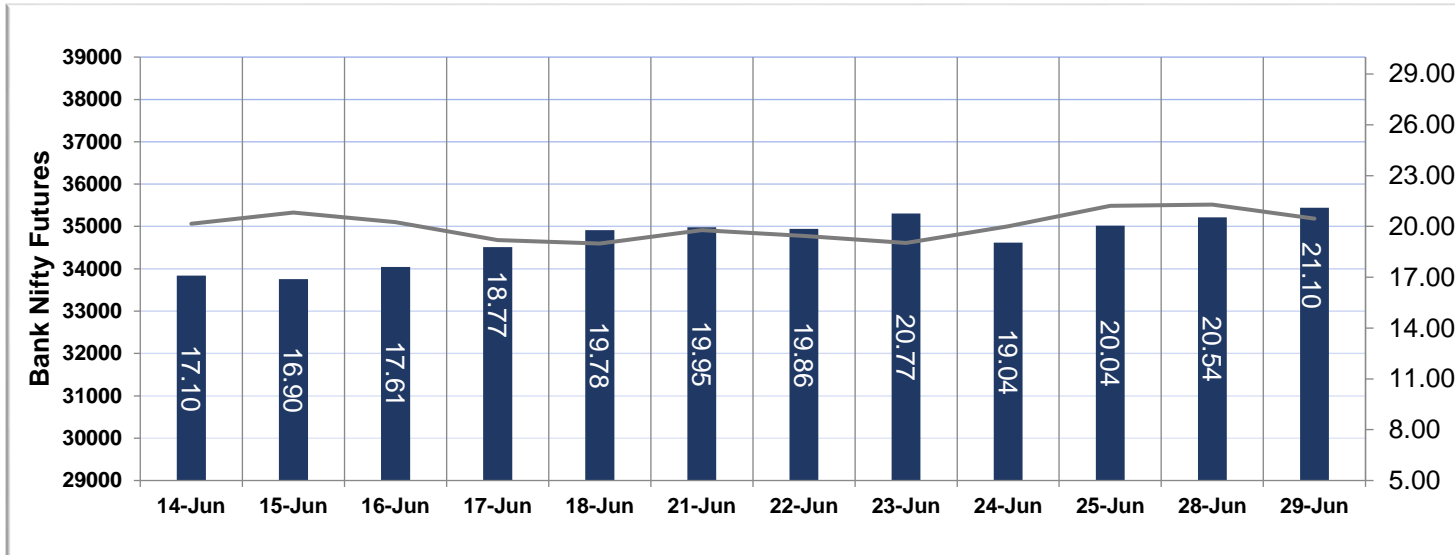


- Nifty Cash prices have settled at **15748.45** down by 0.42 percent from the previous close. On the upper side it has resistance of **15880** and **15950** levels, while lower side it has support of **15660** and **15580** levels. Intraday traders should be cautious and take position accordingly.

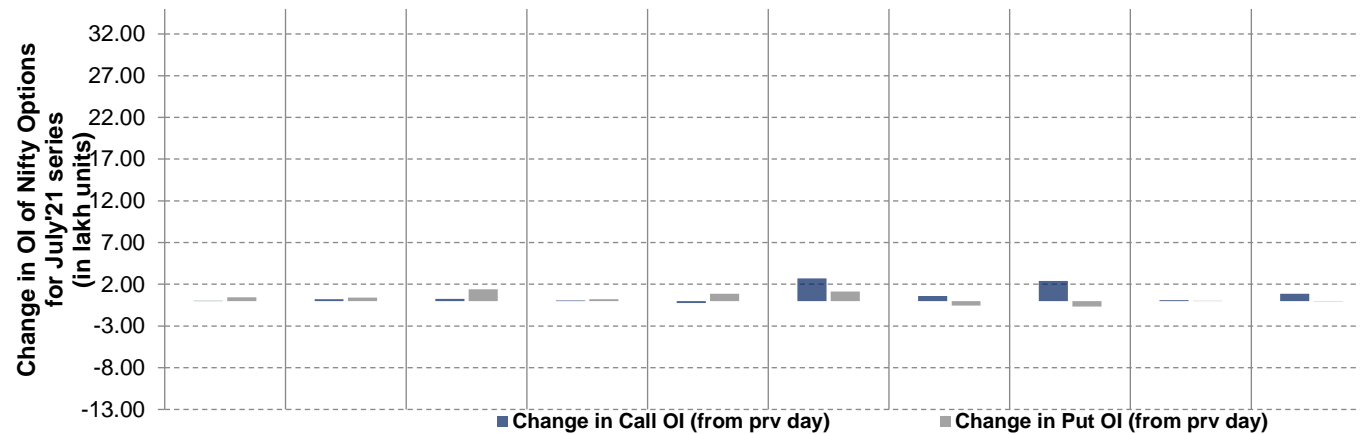
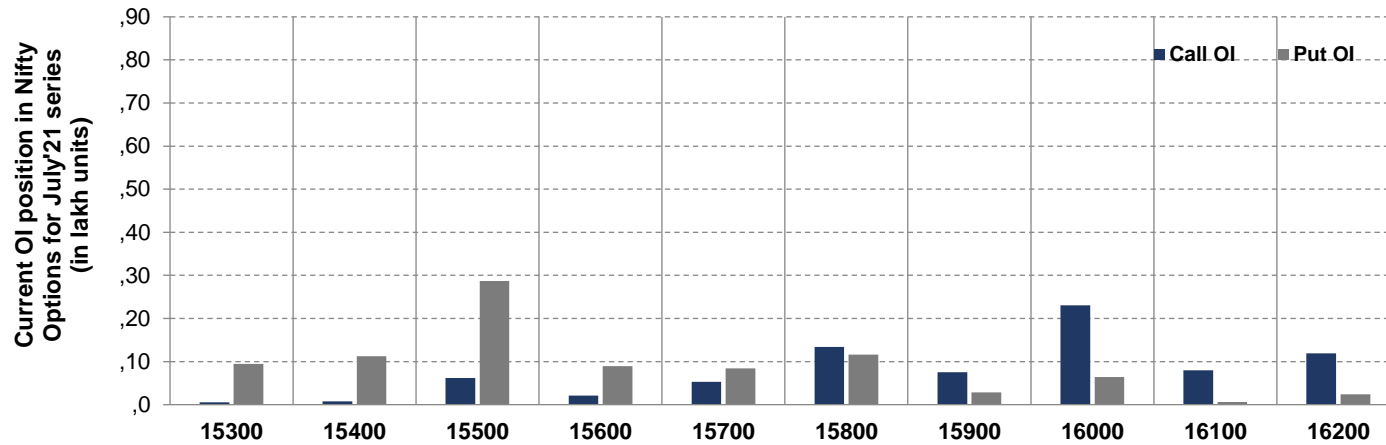
NIFTY FUTURES



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 0.24 million in open interests.
- Among Nifty puts 15,500 SP from the July month expiry was the most active put with an addition of 0.14 million in open interests.
- The maximum OI outstanding for Calls was at 16,000 SP (2.30mn) and that for Puts was at 15,500 SP (2.90mn)

Disclaimer:

The Information provided by SMS or in newsletter or in any document has been prepared by Shah Investor's Home Ltd (SIHL). The Information provided by SMS or in newsletter does not constitute an offer or solicitation for the purchase or sale of any financial instrument or as an official confirmation of any transaction. The information contained herein is from publicly available data or other sources believed to be reliable, but we do not represent that it is accurate or complete and it should not be relied on as such. SIHL or any of its affiliates/ group companies shall not be in any way responsible for any loss or damage that may arise to any person from any error in the information contained in this report or SMS. This Information provided by SMS, reports or in newsletter is provided for assistance only and is not intended to be and must not alone be taken as the basis for an investment decision. The user assumes the entire risk of any use made of this information. Each recipient of this Information provided by SMS, report or in newsletter should make such investigation as it deems necessary to arrive at an independent evaluation of an investment in the securities of companies referred to in this information provided by SMS, report or in newsletter (including the merits and risks involved), and should consult his own advisors to determine the merits and risks of such investment. The investment discussed or views expressed may not be suitable for all investors. This information is strictly confidential and is being furnished to you solely for your information.

The information should not be reproduced or redistributed or passed on directly or indirectly in any form to any other person or published, copied, in whole or in part, for any purpose. The information provided by report or SMS is not directed or intended for distribution to, or use by, any person or entity who is a citizen or resident of or located in any locality, state, country or other jurisdiction, where such distribution, publication, availability or use would be contrary to law, regulation or which would subject SIHL and affiliates/ group companies to any registration or licensing requirements within such jurisdiction. The distribution of this Information provided by SMS or in newsletter in certain jurisdictions may be restricted by law, and persons in whose possession this Information provided by SMS or in newsletter comes, should inform themselves about and observe, any such restrictions. The information given or Information provided by SMS, report or in newsletter is as of the date of the issue date of report or the date on which SMS provided and there can be no assurance that future results or events will be consistent with this information. This information is subject to change without any prior notice. SIHL reserves the right to make modifications and alterations to this statement as may be required from time to time. However, SIHL is under no obligation to update or keep the information current.

Nevertheless, SIHL is committed to providing independent and transparent recommendation to its client and would be happy to provide any information in response to specific client queries. Neither SIHL nor any of its affiliates, group companies, directors, employees, agents or representatives shall be liable for any damages whether direct, indirect, special or consequential including lost revenue or lost profits that may arise from or in connection with the use of the information. Past performance is not necessarily a guide to future performance. The disclosures of interest statements incorporated in the Information provided by SMS, report or in newsletter are provided solely to enhance the transparency and should not be treated as endorsement of the views expressed in the report. The analyst for this report certifies that all of the views expressed in this report accurately reflect his or her personal views about the subject company or companies and its or their securities, and no part of his or her compensation was, is or will be, directly or indirectly related to specific recommendations or views expressed in this report.

About Us:

Shah Investor's Home Ltd (SIHL) is an ISO 9001:2015 Certified financial Services Company established in 1994 at Ahmadabad, Gujarat. Customer satisfaction is guaranteed through our diversified product portfolio, professional management and customer first attitude. SIHL was the first broking house in Gujarat with membership in National Securities Depository Ltd (NSDL) and was the first broking name providing services in NSE F&O in Ahmedabad. Today, SIHL ranks among the top most players in Gujarat in retail stock broking area with 45 branches, 350 franchisee across India and providing service to more than 1,25,000 clients.