



# MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

JAN 22, 2025

# MARKET COMMENTARY



In choppy trading session, Indian equity benchmarks ended Wednesday's trade near day's high levels amid buying in IT and banking sector's stocks. Markets made positive start and till afternoon session trimmed most of their gains. However, markets managed to add gains in late afternoon session. Finally, markets ended with gains of over half a percent on Wednesday.

Some of the important factors in today's trade:

Uncertainties regarding President Trump's potential trade measures: U.S. President Donald Trump repeating his threat to impose tariffs on EU goods entering the States. Trump reiterated his administration's plans to discuss a potential 10 percent tariff on goods imported from China starting February 1 to curb the flow of deadly drug fentanyl that is being sent from China to the U.S. via Mexico and Canada.

HDFC bank's result helps markets to end near intra day high: HDFC Bank has reported 2.31% rise in its consolidated net profit at Rs 17656.61 crore for the quarter ended December 31, 2024 as compared to Rs 17257.87 crore for the same quarter in the previous year.

EPFO adds 14.63 lakh net members during November 2024: Employees' Provident Fund Organisation (EPFO) in its latest 'Provisional payroll data' report has showed that 14.63 lakh net members have been added in the month of November 2024, an increase of 9.07% as compared to the previous month of October 2024.

Global front: European markets were trading higher amid UK budget deficit more than doubled in December from the last year as increases in spending were much larger than increases in receipts. Asian markets ended mostly in green, after South Korea's consumer sentiment increased for the first time in three months in January. The survey results from the Bank of Korea showed that the consumer confidence index rose to 91.2 in January from 88.2 in December.

# MARKET SELFIE



## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	76404.99	566.63	0.75
NIFTY	23155.35	130.70	0.57
MIDCAP	42647.77	-519.62	-1.20
SMLCAP	50906.76	-807.86	-1.56
BSEFMC	20249.68	-6.39	-0.03
HEALTHCARE	42599.64	25.97	0.06
AUTO	50263.12	-114.68	-0.23
POWER	6508.51	-103.68	-1.57
REALTY	6802.42	-322.66	-4.53
BSE IT	42113.57	777.85	1.88
BANKEX	55166.20	145.28	0.26
OIL GAS	25897.84	-215.67	-0.83
METAL	28490.56	-199.94	-0.70
INDIA VIX	16.77	-0.29	-1.70

## ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	949	1968	25
BSE	1142	2802	115

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	5503	6387	(14)
NSE CASH	96644	99490	(3)
NSE F&O	204583	231690	(12)

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	21.19	3.45	1.35
SENSEX	21.97	3.94	1.19

# KEY NUMBERS TRACKER



FII – DII ACTIVITY IN CASH SEGMENT (₹ in Crs)			
FII-DII*	Buy	Sell	Net
DII	15437	11797	3640
FII	12937	16963	(4026)

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)			
FII	Buy	Sell	Net
Index Futures	4356.53	5327.05	(971)
Index Options	1627402.65	1677528.12	(50125)
Stock Futures	29520.49	27739.96	1781
Stock Options	117172.27	118759.36	(1587)

PUT-CALL RATIO		
Index	Current	Previous
NIFTY	0.87	0.78
BANK NIFTY	0.57	0.56

DOLLAR INDEX			
Dollar Index	Current	Previous	% Change
DXY	107.83	108.10	-0.25

10-YEARS G-SEC YIELD			
Country	Current	Previous	% Change
INDIA	6.738	6.763	-0.37
USA	4.581	4.611	-0.65

KEY COMMODITIES TRACKER (in \$)			
Commodity	Current	Change Points	% Change
Gold	2758.37	14.43	0.53
Silver	30.85	0.12	0.42
Crude-Oil	76.36	0.53	0.70
Brent-Crude	79.82	0.53	0.67



# CURRENCY FUTURES & INDEX TRENDS TRACKER



## CURRENCY FUTURES

Expiry	Close	Change Points	% Change
29 JAN-24 USD-INR	86.40	-0.27	-0.31
29 JAN-24 EUR-INR	90.23	0.44	0.49
29 JAN-24 GBP-INR	106.80	0.69	0.65
29 JAN-24 JPY- INR	55.40	-0.44	-0.80

## INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS

Index	Close	S2	S1	Pivot	R1	R2
NIFTY	23155	22914	23035	23102	23223	23290
SENSEX	76405	75582	75993	76228	76640	76875
NIFTY FUTURES	23199	22946	23073	23146	23273	23346
BANK NIFTY	48724	47819	48272	48527	48979	49234
CNX IT	42591	41440	42015	42325	42901	43211
CNX MIDCAP	53114	51520	52317	53150	53947	54780
CNX SMALLCAP	17173	16612	16892	17195	17476	17779
INDIA VIX	16.77	15.26	16.01	16.66	17.41	18.06

## INDEX TREND ANALYSIS

Index	Daily	Weekly	Monthly
NIFTY	SELL	SELL	NEUTRAL
SENSEX	SELL	SELL	NEUTRAL
NIFTY FUTURES	SELL	SELL	NEUTRAL
BANK NIFTY	SELL	SELL	NEUTRAL
CNX IT	NEUTRAL	NEUTRAL	Buy
CNX MIDCAP	SELL	Buy	Buy
CNX SMALLCAP	SELL	Buy	Buy
INDIA VIX	Buy	Buy	SELL

## SECURITIES BAN IN F&O TRADES FOR 23-01-2025

**ABFRL, BANDHANBNK, CANFINHOME, DIXON, INDIAMART, LTF,  
MANAPPURAM, MGL, PNB, RBLBANK**

# TECHNICAL VIEWS



## NIFTY

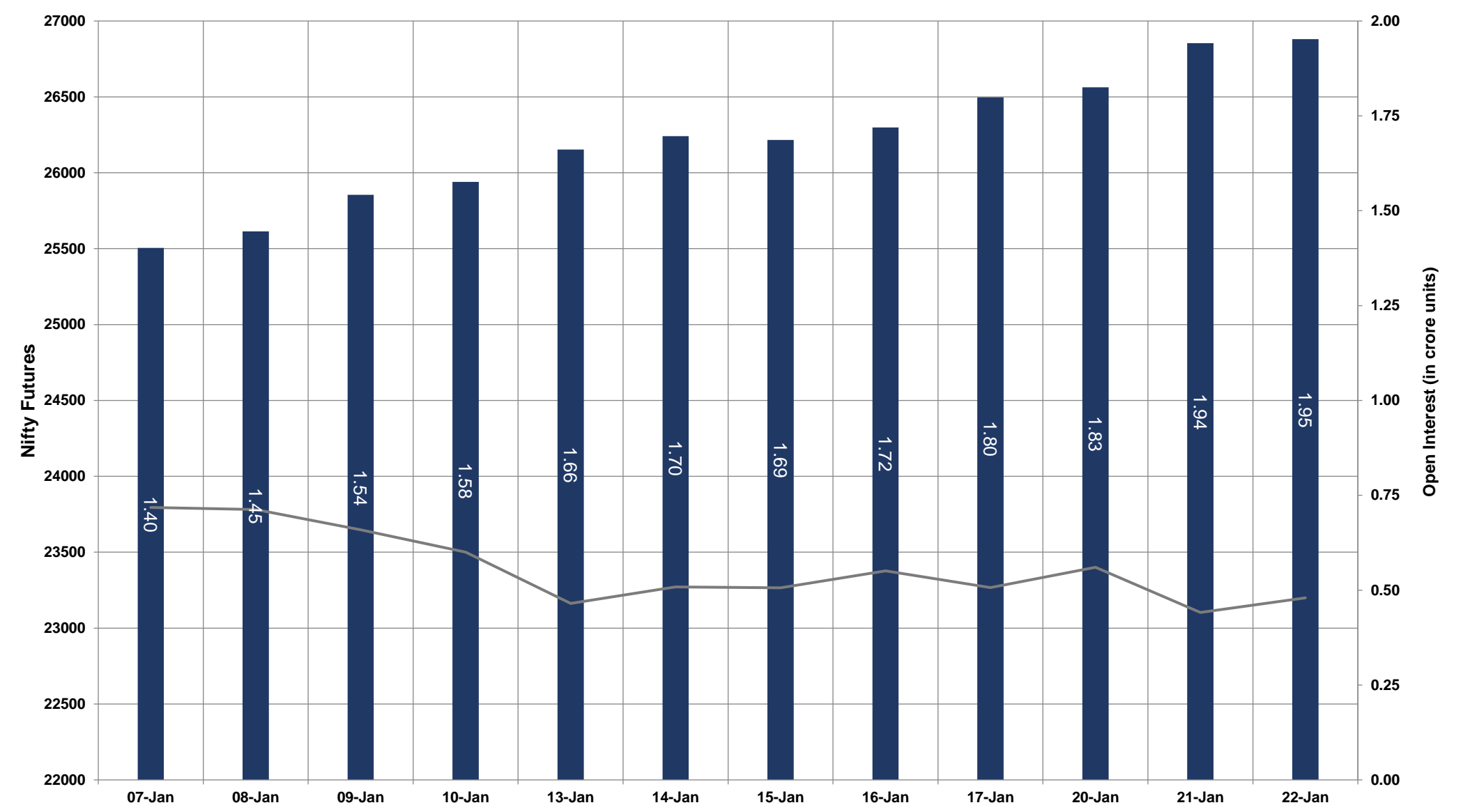


- Nifty Cash = **23155.35 (0.57%)**
- Resistance levels = **23230** and **23350**
- Support levels = **22950** and **22830**

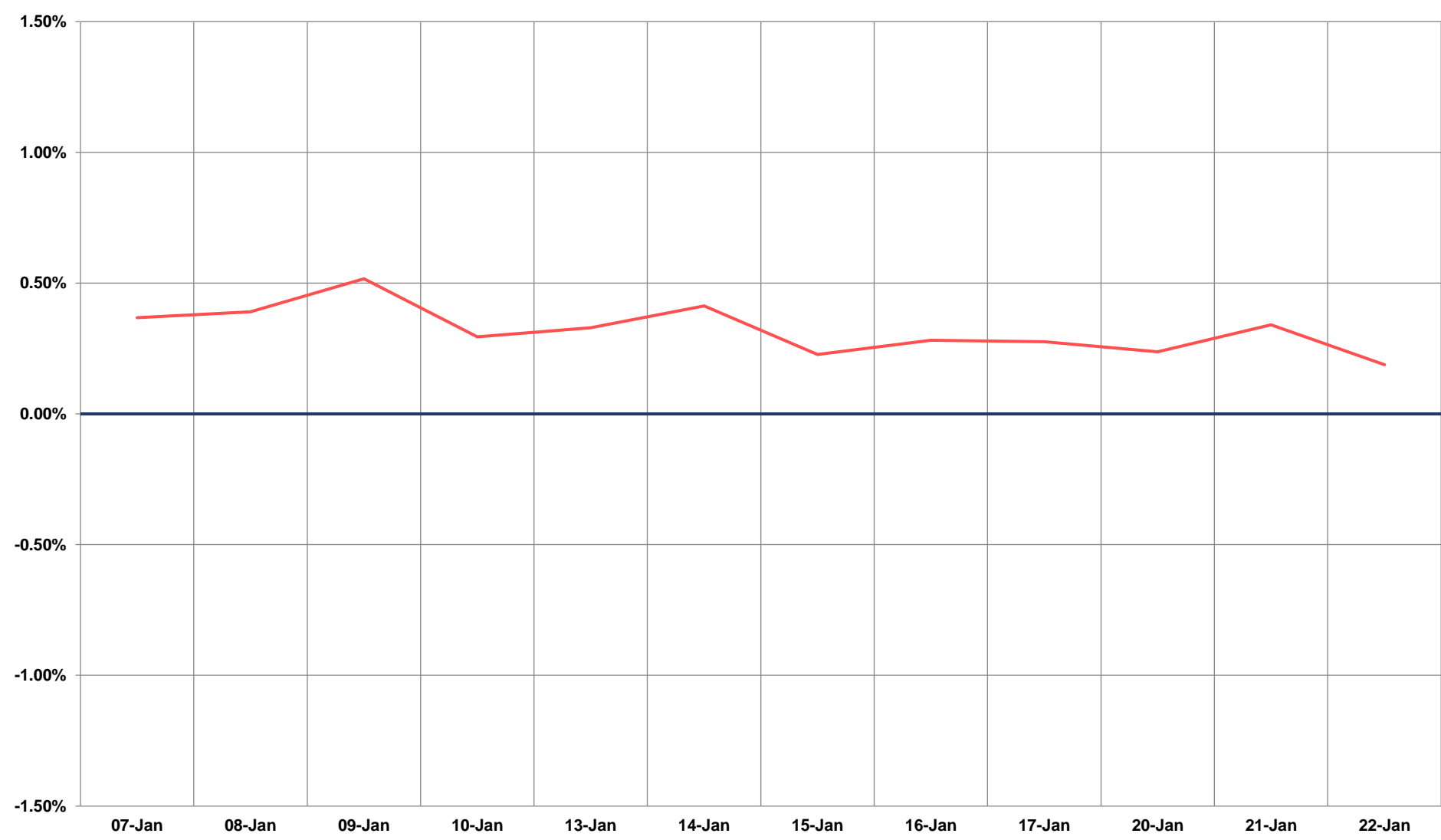
# TECHNICAL VIEWS



## NIFTY FUTURES



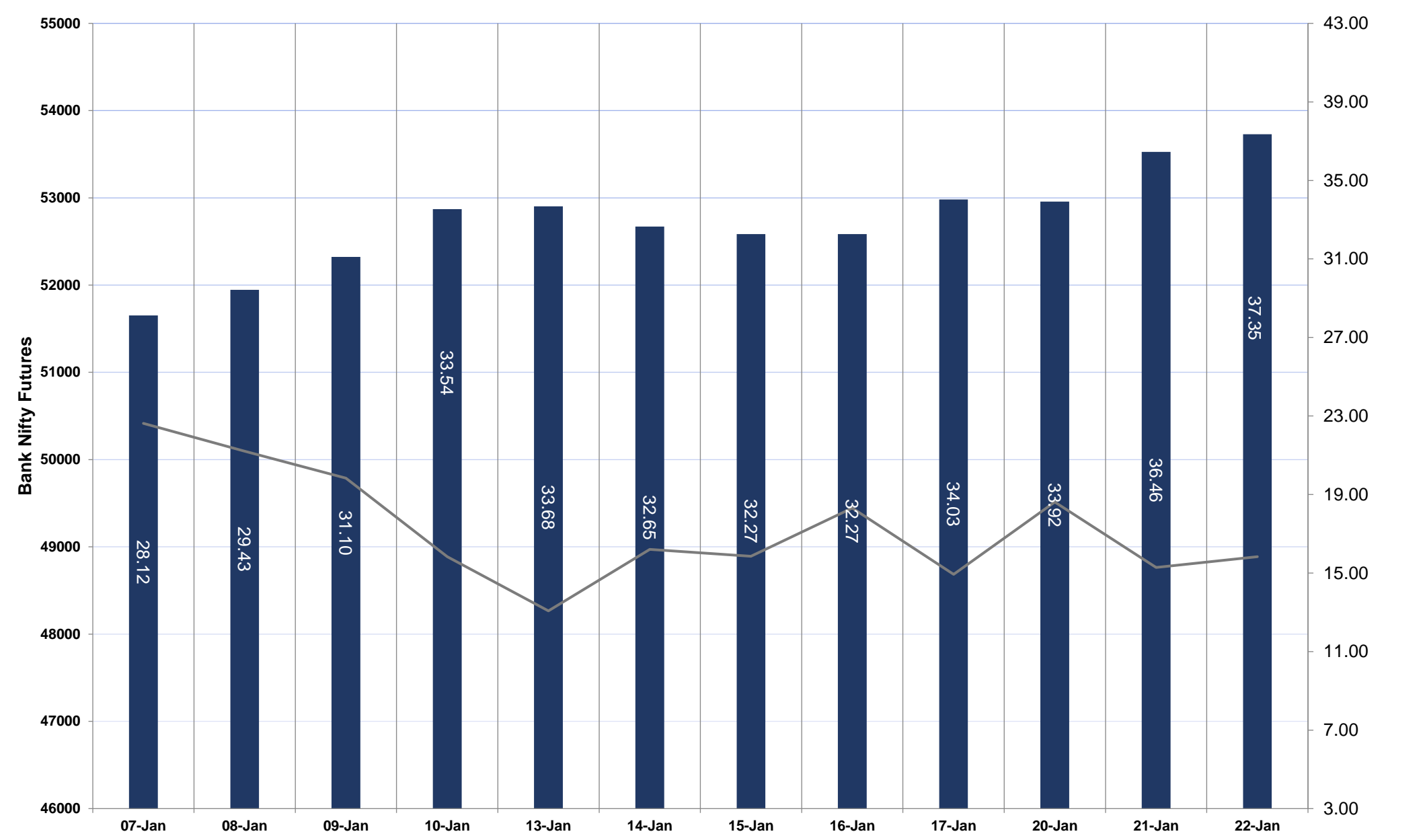
## SPREAD: FUTURE & SPOT



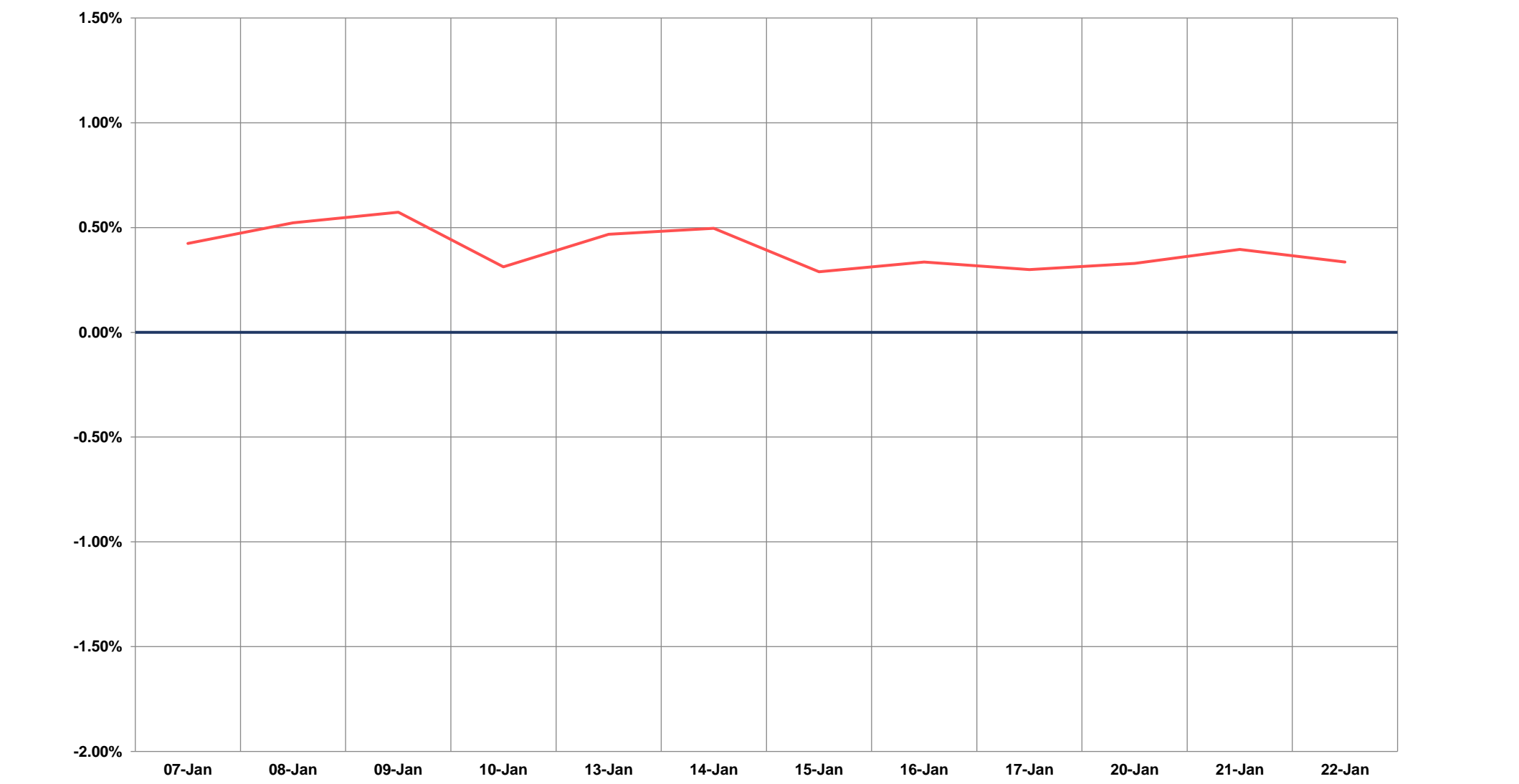
# TECHNICAL VIEWS



## BANK NIFTY FUTURES



## SPREAD: FUTURE & SPOT

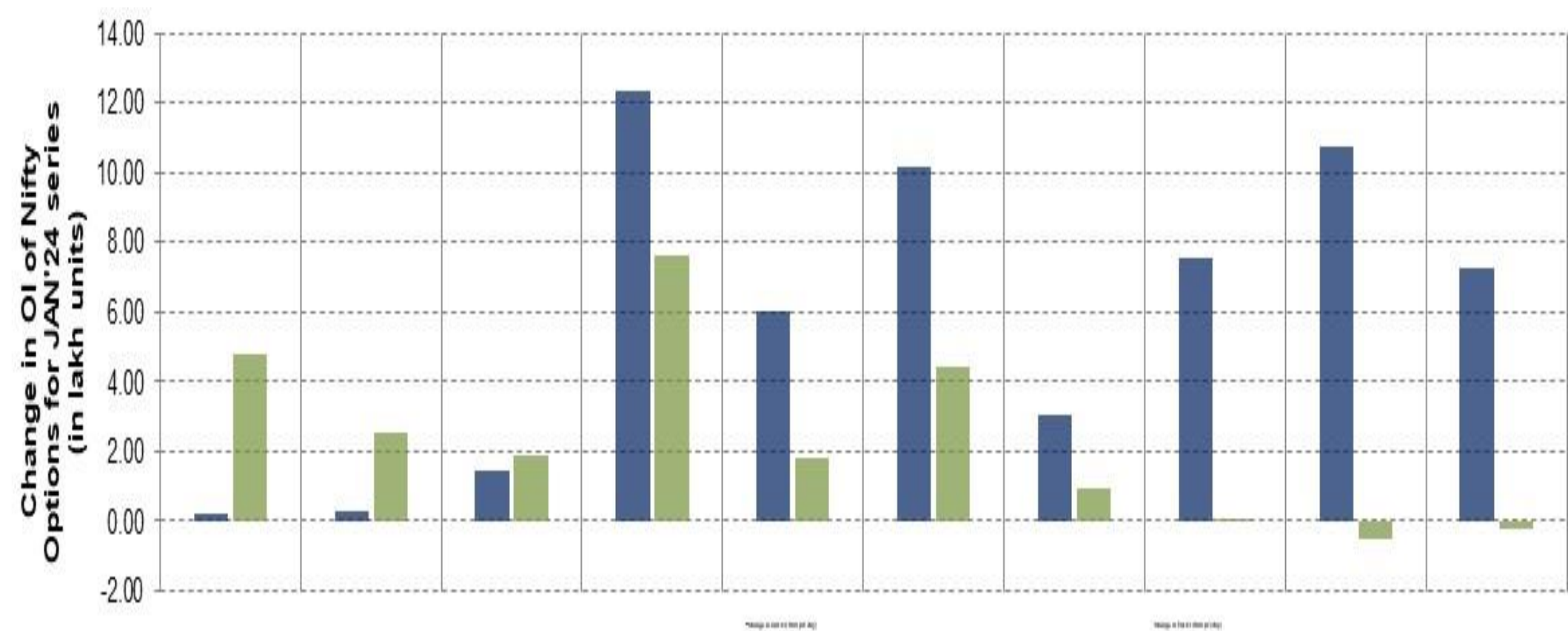
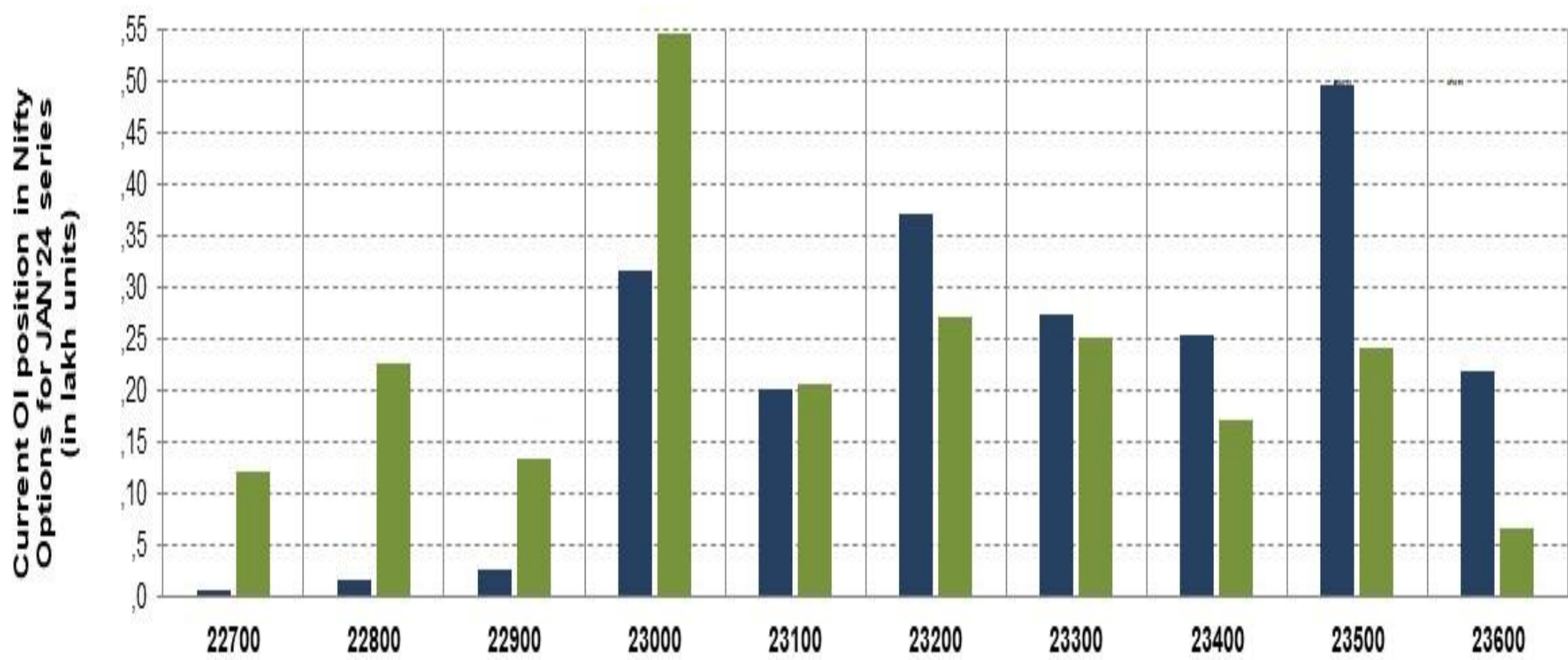




# TECHNICAL VIEWS



## NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 1.23 million in Open Interests is **Strike Price of 23000**
- **Most Active Nifty Put** with an addition of 0.75 millions in Open Interests is **Strike Price of 23000**
- **Maximum Open Interest** an outstanding was 4.95 millions for Calls at **Strike Price of 23500**
- **Maximum Open Interest** an outstanding was 5.45 millions for puts at **Strike Price of 23000**

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