



MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

JAN 27, 2025



Indian equity benchmarks continued their southward journey on Monday amid heavy selling pressure in IT sector's stocks. Besides, sustained foreign outflows dampened investor sentiment. Since morning, indices traded in red and extended their losses till the end of the session amid U.S. tariff fears.

Some of the important factors in today's trade:

Fresh concerns over U.S. tariff: US President Donald Trump has said he will impose 25% tariffs and sanctions on Colombia after its president barred two US military planes carrying deported migrants from landing in the country. Trump said the tariffs 'on all goods' coming into the US from Colombia would be put in place 'immediately', and in one week the 25% tariffs would be raised to 50%.

Pre-budget cautiousness: Investor avoided to take risk ahead of the Union Budget 2025-26 to be tabled in parliament on February 01, 2025. Traders were concerned about income tax.

Federal Reserve meeting: The Federal Reserve's two-day meeting starting January 28 is a key focus for investors. Traders were hoping that the central bank to maintain current interest rates.

Global front: European markets were trading lower as artificial intelligence-related stocks succumbed to selling pressure on doubts over America's technological dominance. Investors also digested weak economic data from China and looked ahead to the Fed and ECB interest-rate decisions due this week. Asian markets ended mostly in red after Japan's leading index decreased less than initially estimated in November. The latest data from the Cabinet Office showed that the leading index, which measures future economic activity, dropped to a 3-month low of 107.5 in November from 109.1 in October. The flash reading was 107.0.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	75366.17	-824.29	-1.08
NIFTY	22829.15	-263.05	-1.14
MIDCAP	41571.60	-1144.03	-2.68
SMLCAP	48346.37	-1761.14	-3.51
BSEFMC	20186.07	-181.21	-0.89
HEALTHCARE	41053.32	-1150.41	-2.73
AUTO	49475.40	-491.80	-0.98
POWER	6312.26	-148.26	-2.29
REALTY	6600.29	-116.43	-1.73
BSE IT	41301.30	-1412.31	-3.31
BANKEX	54703.29	-20.06	-0.04
OIL GAS	24572.67	-609.35	-2.42
METAL	27690.65	-814.29	-2.86
INDIA VIX	18.13	1.38	8.24

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	527	2476	20
BSE	593	3522	119

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	5637	4907	15
NSE CASH	95151	87531	9
NSE F&O	363028	223921	62

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	20.85	3.40	1.37
SENSEX	21.45	3.88	1.20

KEY NUMBERS TRACKER



FII – DII ACTIVITY IN CASH SEGMENT (₹ in Crs)			
FII-DII*	Buy	Sell	Net
DII	16503	9861	6642
FII	9489	14504	(5015)

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)			
FII	Buy	Sell	Net
Index Futures	7607.39	7641.70	(34)
Index Options	862661.32	861296.79	1365
Stock Futures	123114.73	120163.90	2951
Stock Options	124385.66	123720.25	665

PUT-CALL RATIO		
Index	Current	Previous
NIFTY	0.76	0.84
BANK NIFTY	0.59	0.56

DOLLAR INDEX			
Dollar Index	Current	Previous	% Change
DXY	107.25	107.60	-0.32

10-YEARS G-SEC YIELD			
Country	Current	Previous	% Change
INDIA	6.680	6.720	-0.60
USA	4.505	4.623	-2.55

KEY COMMODITIES TRACKER (in \$)			
Commodity	Current	Change Points	% Change
Gold	2767.65	-1.42	-0.05
Silver	30.47	-0.02	-0.07
Crude-Oil	74.99	0.33	0.44
Brent-Crude	78.88	0.38	0.48

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES

Expiry	Close	Change Points	% Change
29 JAN-24 USD-INR	86.31	0.04	0.04
29 JAN-24 EUR-INR	90.75	0.32	0.35
29 JAN-24 GBP-INR	107.90	0.75	0.70
29 JAN-24 JPY- INR	56.13	0.63	1.13

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS

Index	Close	S2	S1	Pivot	R1	R2
NIFTY	22829	22654	22742	22875	22962	23095
SENSEX	75366	74862	75114	75520	75772	76178
NIFTY FUTURES	22846	22675	22761	22895	22981	23115
BANK NIFTY	48065	47601	47833	48076	48308	48551
CNX IT	42061	41138	41599	42423	42884	43707
CNX MIDCAP	51796	50928	51362	52064	52497	53199
CNX SMALLCAP	16304	15825	16065	16419	16658	17012
INDIA VIX	18.13	16.02	17.07	17.80	18.85	19.58

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	SELL	Buy	Buy
CNX MIDCAP	SELL	SELL	Buy
CNX SMALLCAP	SELL	SELL	Buy
INDIA VIX	Buy	Buy	SELL

SECURITIES BAN IN F&O TRADES FOR 28-01-2025

INDIAMART, MANAPPURAM, MGL, PNB

TECHNICAL VIEWS



NIFTY

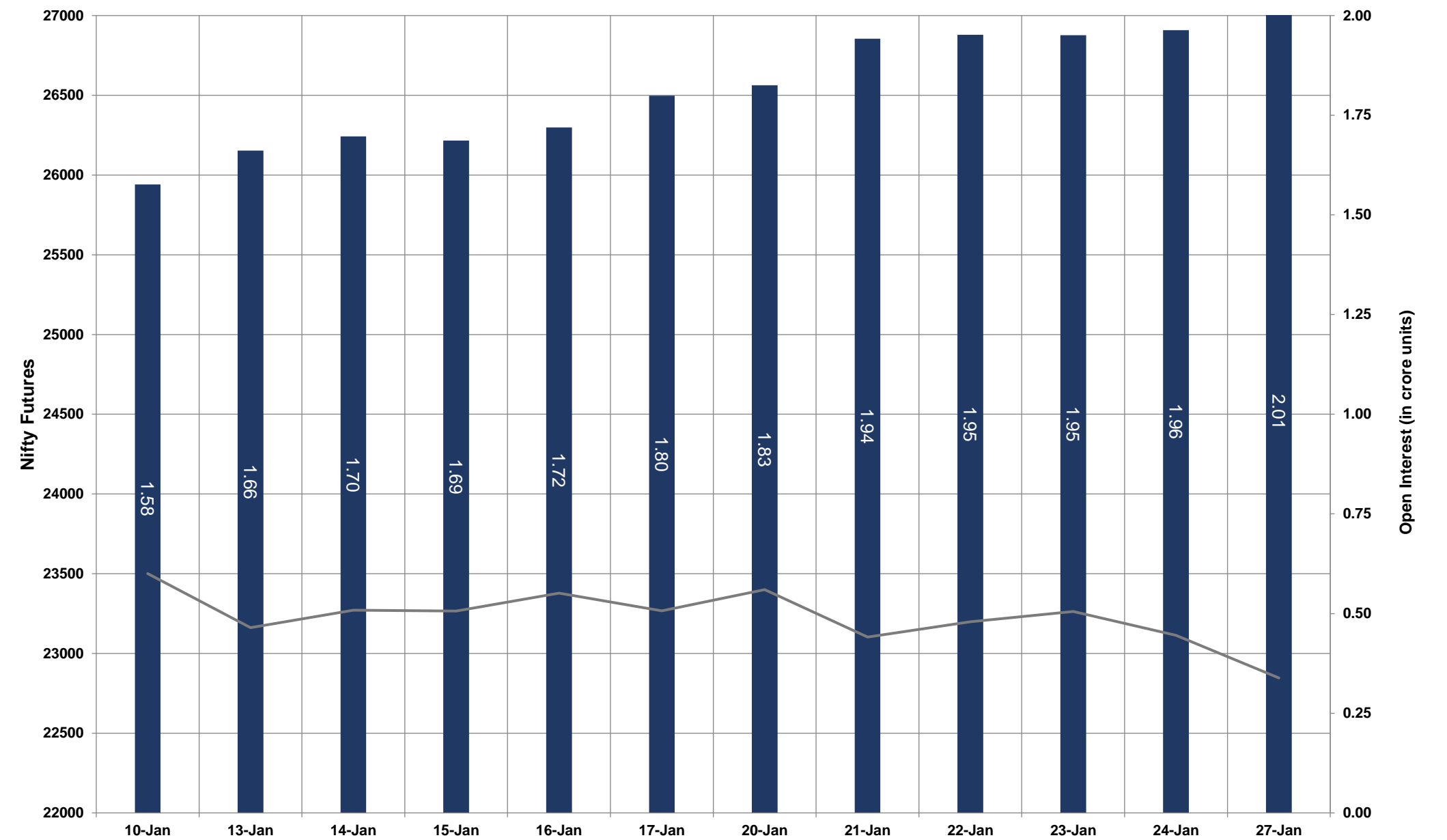


- Nifty Cash = **23092.20 (-0.49%)**
- Resistance levels = **23310** and **23360**
- Support levels = **22970** and **22860**

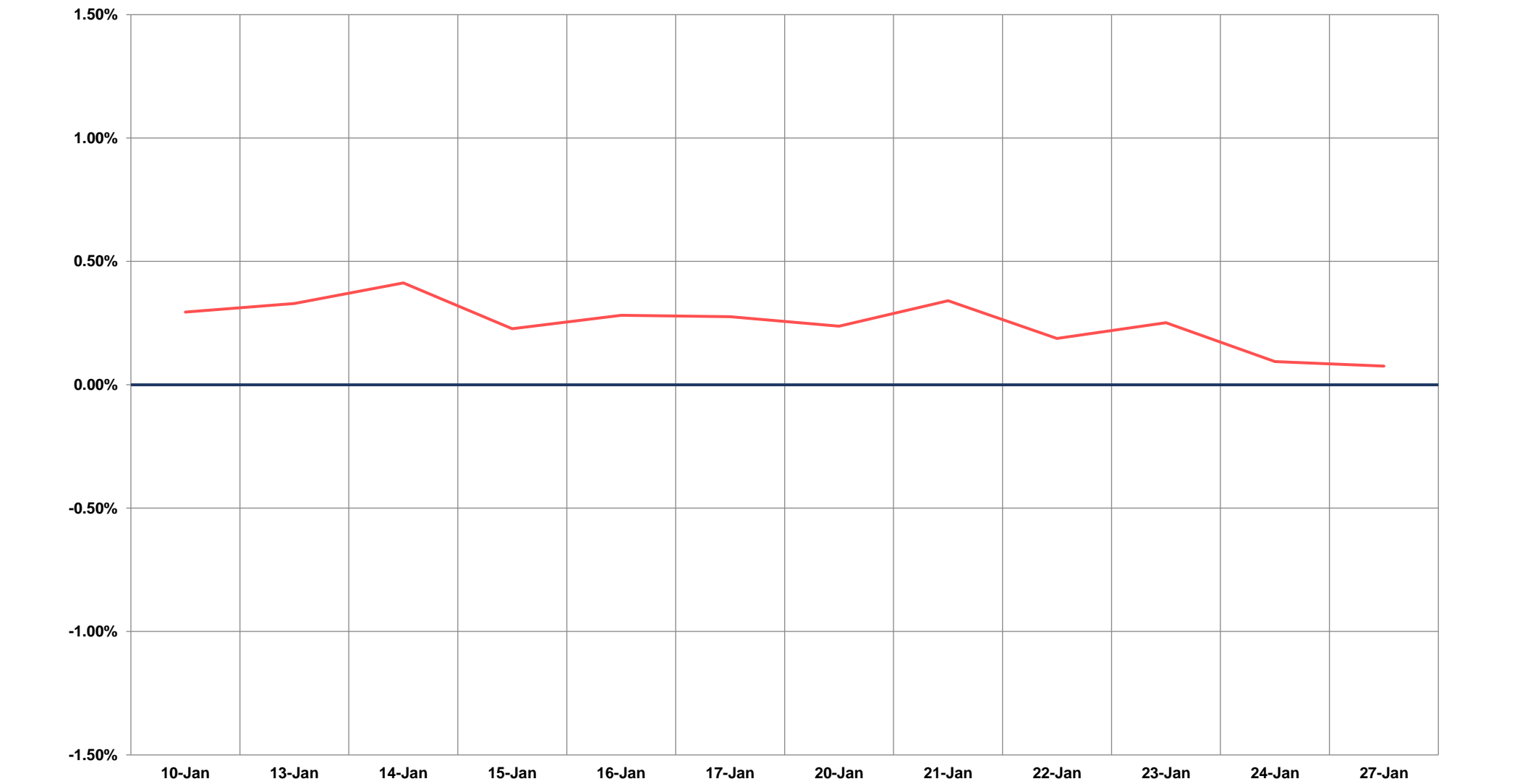
TECHNICAL VIEWS



NIFTY FUTURES



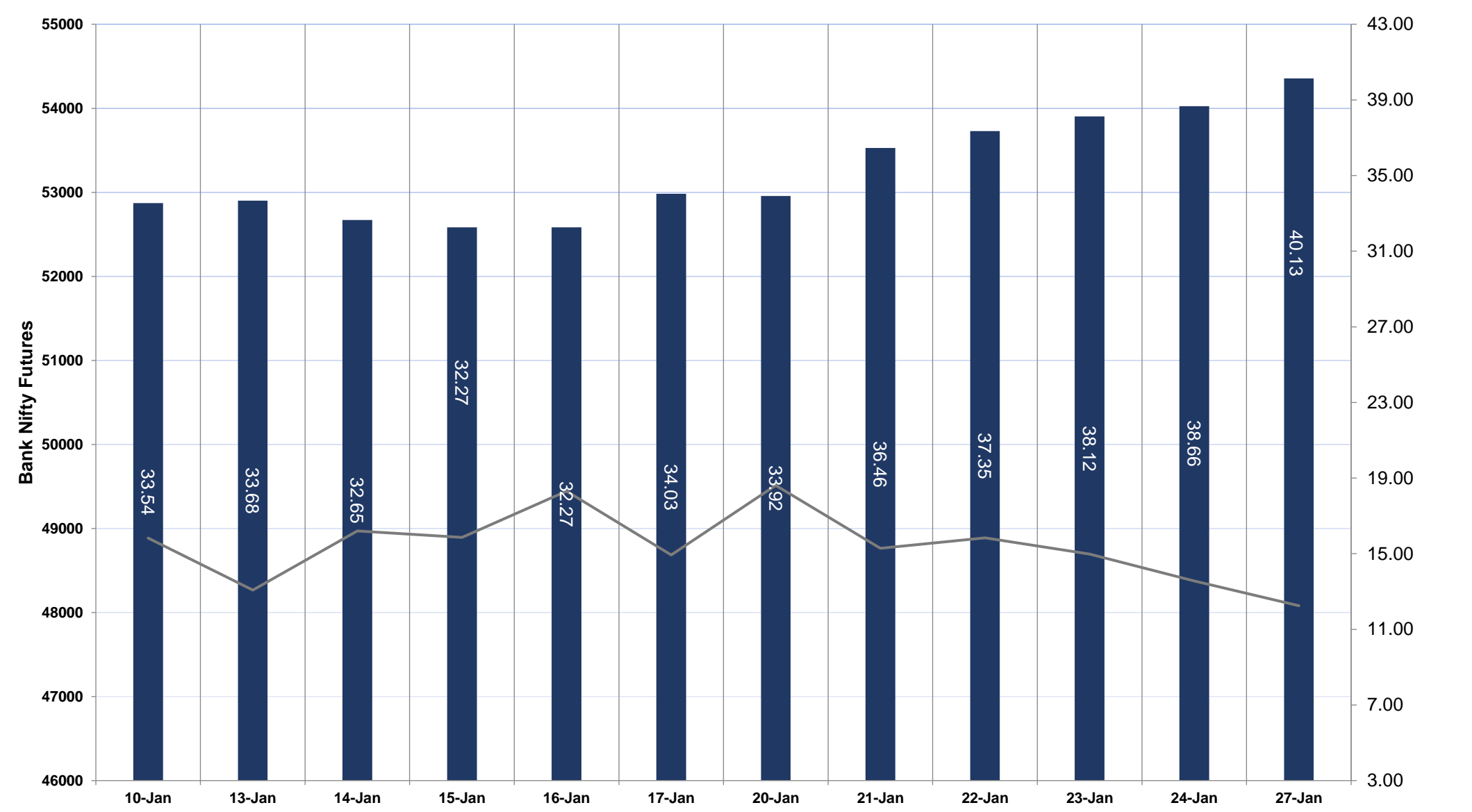
SPREAD: FUTURE & SPOT



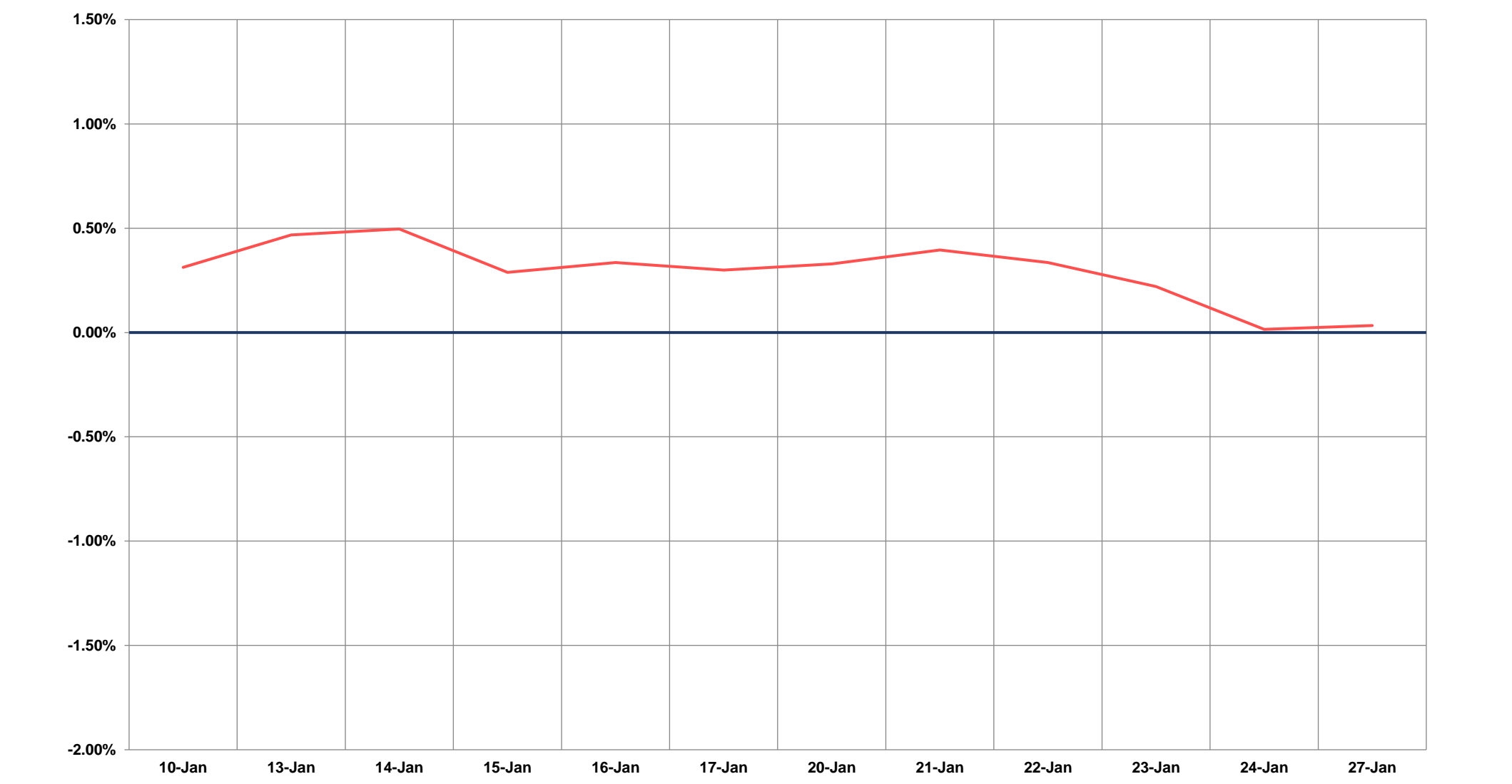
TECHNICAL VIEWS



BANK NIFTY FUTURES



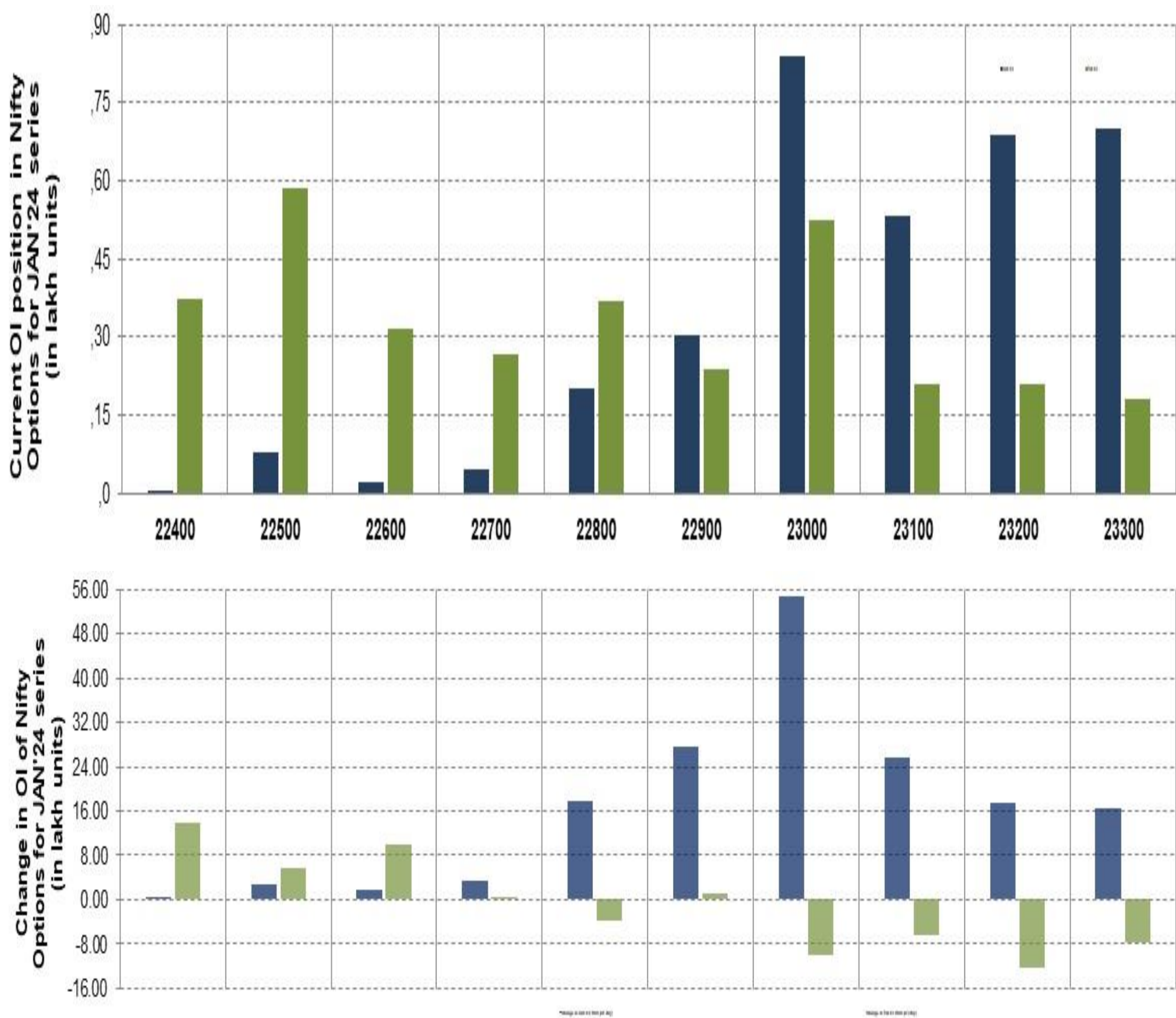
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 5.46 million in Open Interests is **Strike Price of 23000**
- **Most Active Nifty Put** with an addition of 1.40 millions in Open Interests is **Strike Price of 22400**
- **Maximum Open Interest an outstanding** was 8.39 millions for Calls at **Strike Price of 23000**
- **Maximum Open Interest an outstanding** was 5.83 millions for puts at **Strike Price of 22500**

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