



MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

FEB 07, 2025

MARKET COMMENTARY



Indian equity benchmarks ended Friday's trading session in a negative terrain as the Reserve Bank of India's (RBI's) rate cut failed to cheer markets. Market made a cautious start and altered between red and green, amid mixed cues from other Asian markets. In afternoon session, market managed to trim some of their losses and ended tad lower.

Some of the important factors in today's trade:

RBI cuts intertest rate after 5 years: Sentiments were downbeat despite Reserve Bank of India (RBI) has cut interest rate for the first time in nearly five years. Its Monetary Policy Committee has reduced the repo rate by 25 bps to 6.25 per cent, after having kept it unchanged at 6.50 per cent for eleven straight meetings, and not having lowered it since May 2020.

Foreign fund outflows: Traders were cautious as exchange data showed Foreign institutional investors (FIIs) offloaded equities worth Rs 3,549.95 crore in the capital markets on a net basis on Thursday.

PSBs net profit up 31.3% in April-December: Traders took note of Ministry of Finance in its latest data report has showed that public sector banks (PSBs) recorded net profit growth of 31.3% year on year to achieve highest ever aggregate net profit of Rs 1,29,426 crore and aggregate operating profit of Rs 2,20,243 crore, in first nine months of the financial year 2024-25.

Global front: European markets were trading mostly in red, ahead to the release of the monthly U.S. jobs report later in the day, which might offer additional clues regarding the Federal Reserve's next interest rate decision this year. Asian markets ended mixed, even as Japan's leading index increased more-than-expected at the end of the year. The preliminary data from the Cabinet Office showed that the leading index, which measures future economic activity, rose to 108.9 in December from a 3-month low of 107.8 in November.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	77860.19	-197.97	-0.25
NIFTY	23559.95	-43.40	-0.18
MIDCAP	43050.27	55.02	0.13
SMLCAP	50164.22	-341.27	-0.68
BSEFMC	20050.83	-254.64	-1.25
HEALTHCARE	43149.88	2.77	0.01
AUTO	52671.66	334.23	0.64
POWER	6264.24	-25.56	-0.41
REALTY	7155.58	25.65	0.36
BSE IT	42230.99	-167.53	-0.40
BANKEX	56777.69	-281.67	-0.49
OIL GAS	24909.45	-331.74	-1.31
METAL	28912.98	676.86	2.40
INDIA VIX	13.69	-0.49	-3.46

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1198	1709	45
BSE	1520	2402	142

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	4548	4825	(6)
NSE CASH	88909	90769	(2)
NSE F&O	177863	150774	18

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	21.41	3.51	1.41
SENSEX	21.70	4.00	1.20

KEY NUMBERS TRACKER



FII – DII ACTIVITY IN CASH SEGMENT (₹ in Crs)			
FII-DII*	Buy	Sell	Net
DII	12186	11731	454
FII	12482	12953	(470)

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)			
FII	Buy	Sell	Net
Index Futures	3072.54	4155.44	(1083)
Index Options	707597.20	699735.54	7862
Stock Futures	22610.90	22128.06	483
Stock Options	46681.58	46673.34	8

PUT-CALL RATIO		
Index	Current	Previous
NIFTY	0.83	0.84
BANK NIFTY	0.85	0.93

DOLLAR INDEX			
Dollar Index	Current	Previous	% Change
DXY	107.70	107.70	-0.01

10-YEARS G-SEC YIELD			
Country	Current	Previous	% Change
INDIA	6.706	6.657	0.74
USA	4.431	4.438	-0.16

KEY COMMODITIES TRACKER (in \$)			
Commodity	Current	Change Points	% Change
Gold	2866.43	8.68	0.30
Silver	32.30	0.09	0.31
Crude-Oil	71.23	0.62	0.88
Brent-Crude	74.98	0.69	0.93

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES

Expiry	Close	Change Points	% Change
25 FEB-24 USD-INR	87.58	-0.10	-0.11
25 FEB-24 EUR-INR	90.93	0.04	0.04
25 FEB-24 GBP-INR	109.02	0.15	0.13
25 FEB-24 JPY- INR	57.90	-0.13	-0.22

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS

Index	Close	S2	S1	Pivot	R1	R2
NIFTY	23560	23315	23437	23566	23689	23817
SENSEX	77860	77016	77438	77898	78320	78779
NIFTY FUTURES	23615	23370	23492	23644	23766	23917
BANK NIFTY	50159	49453	49806	50224	50577	50995
CNX IT	42922	42383	42652	42893	43162	43403
CNX MIDCAP	53609	52640	53125	53517	54001	54394
CNX SMALLCAP	17007	16715	16861	16984	17130	17252
INDIA VIX	13.68	12.96	13.32	13.91	14.27	14.86

INDEX TREND ANALYSIS

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

SECURITIES BAN IN F&O TRADES FOR 10-02-2025

MANAPPURAM	
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TECHNICAL VIEWS



NIFTY

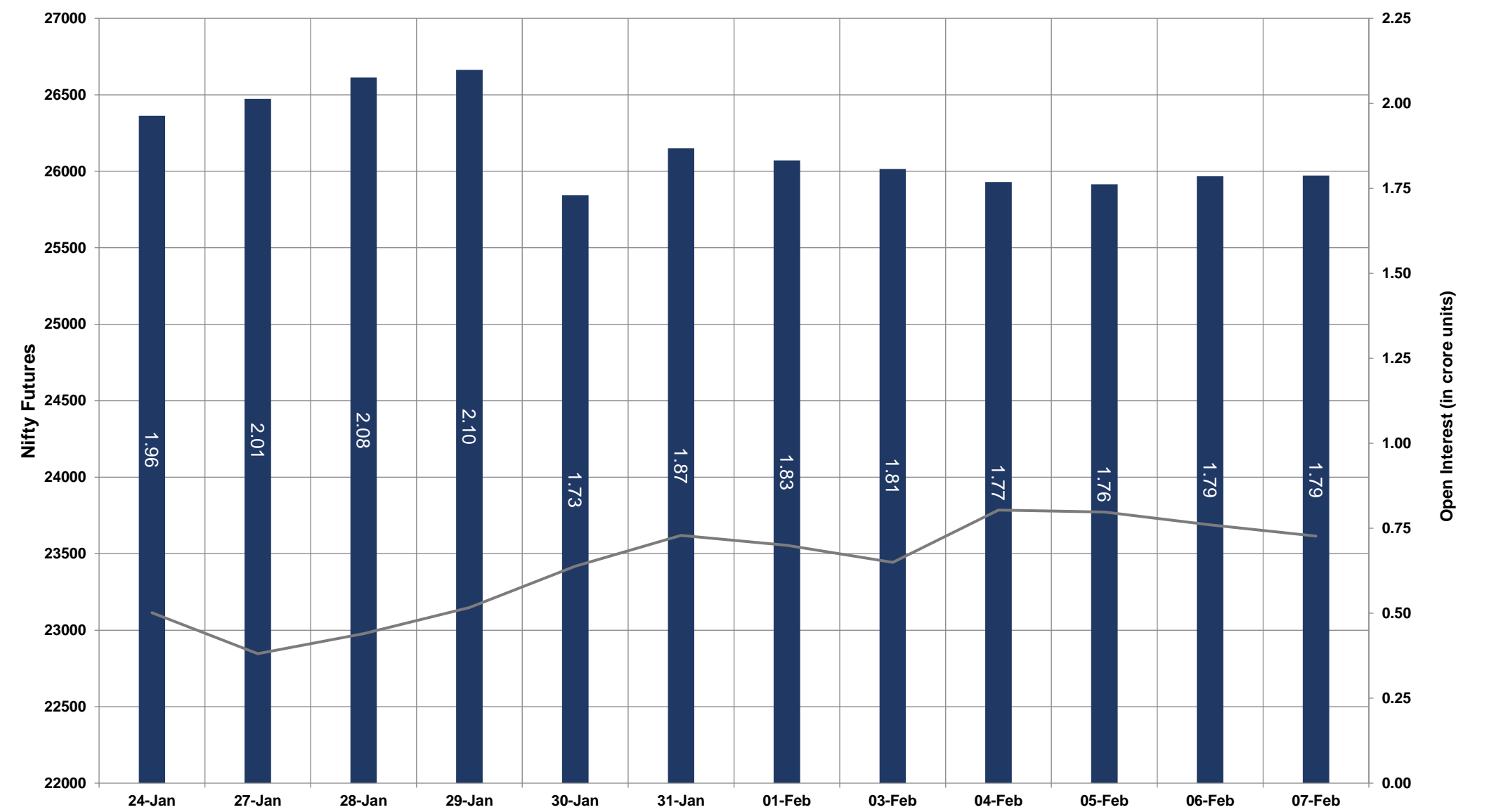


- Nifty Cash = **23559.95 (-0.18%)**
- Resistance levels = **23660** and **23750**
- Support levels = **23420** and **23350**

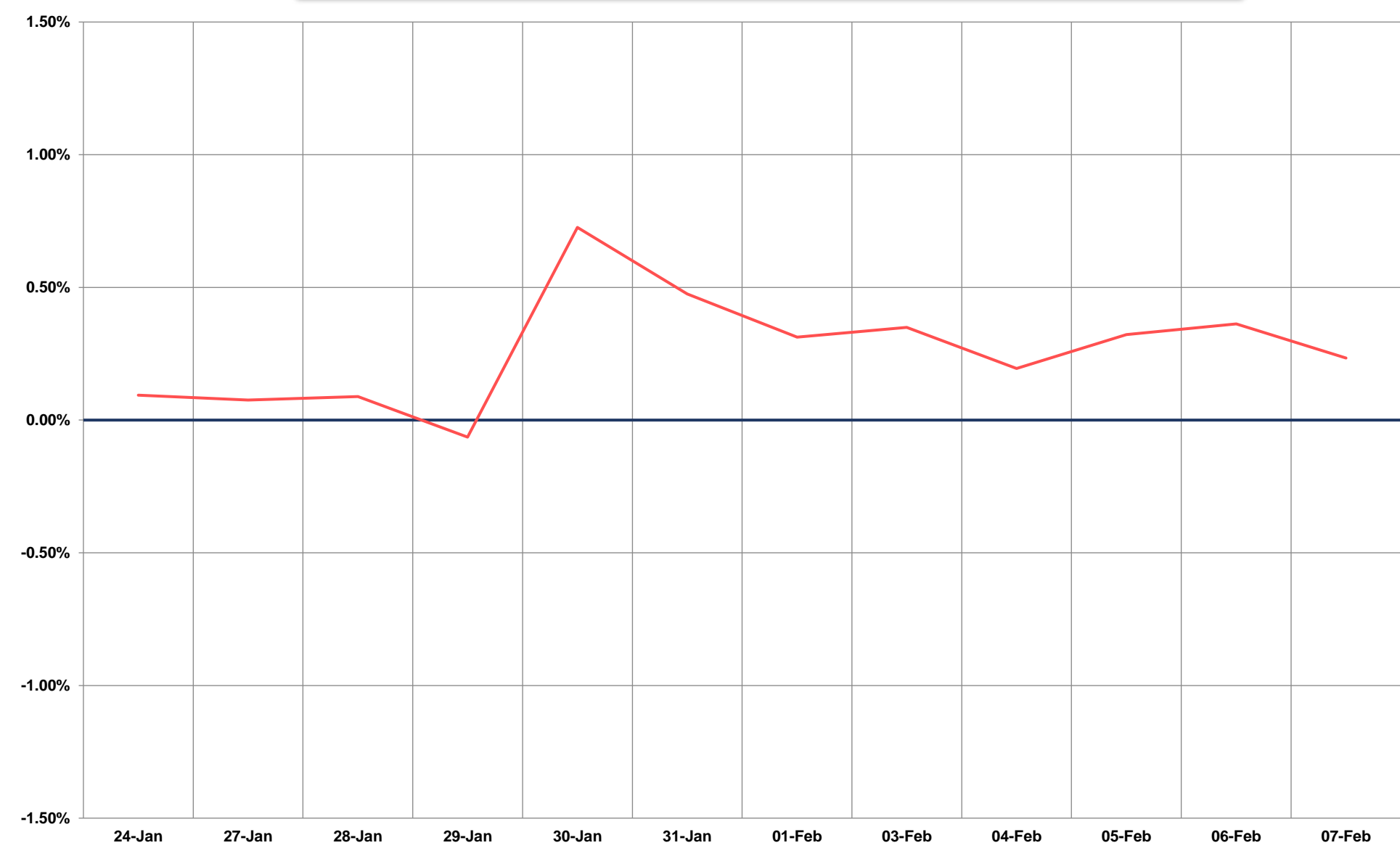
TECHNICAL VIEWS



NIFTY FUTURES



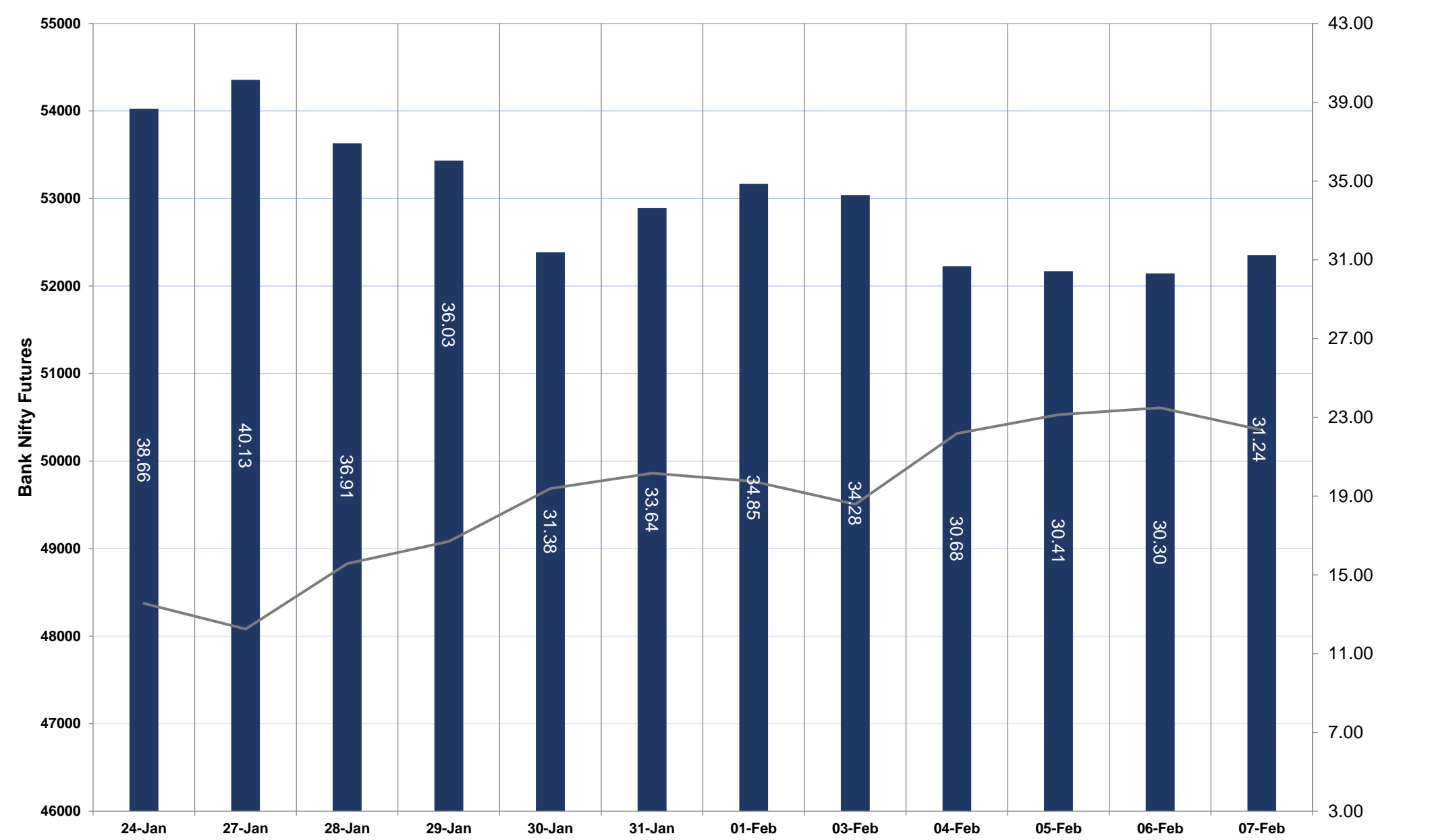
SPREAD: FUTURE & SPOT



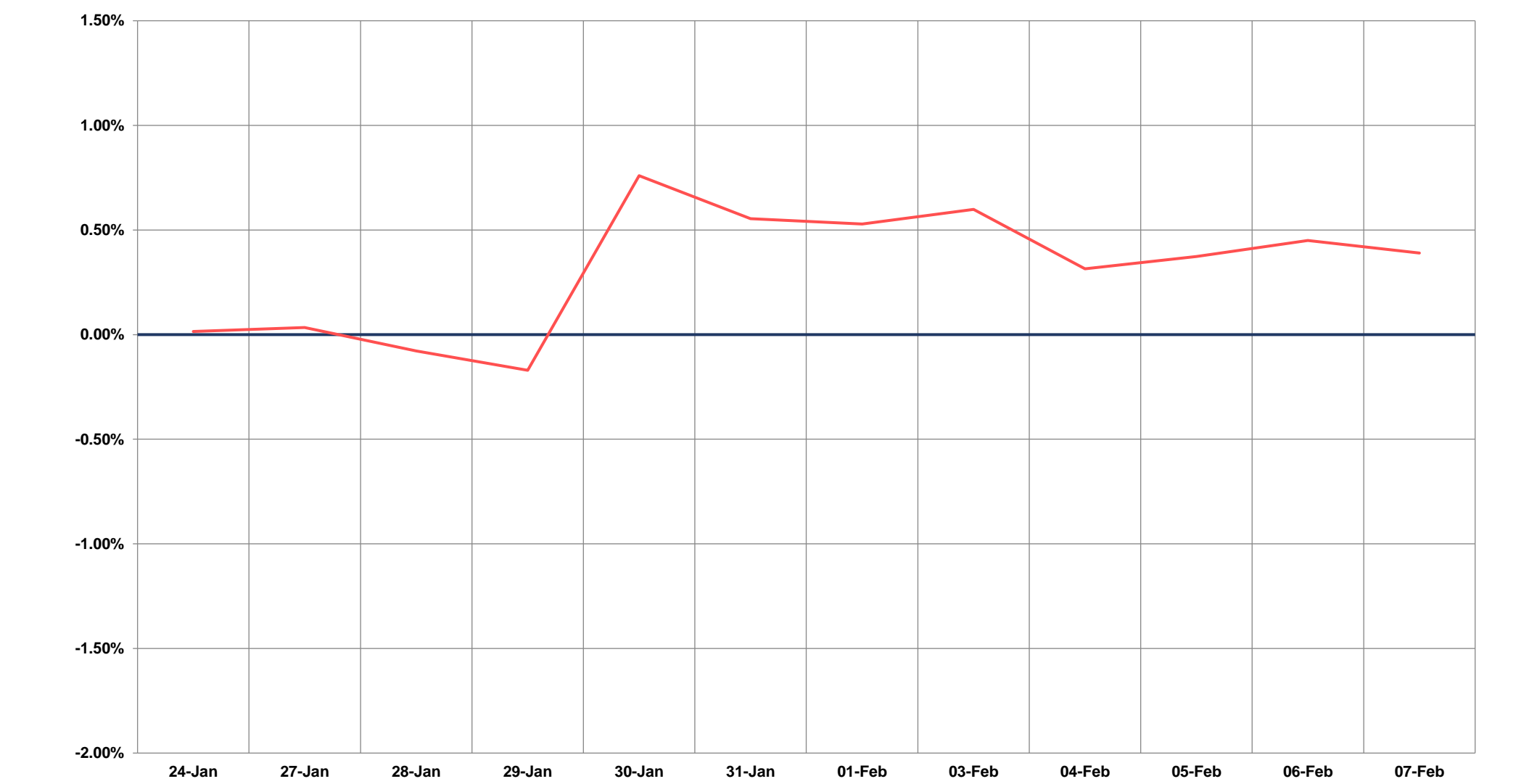
TECHNICAL VIEWS



BANK NIFTY FUTURES



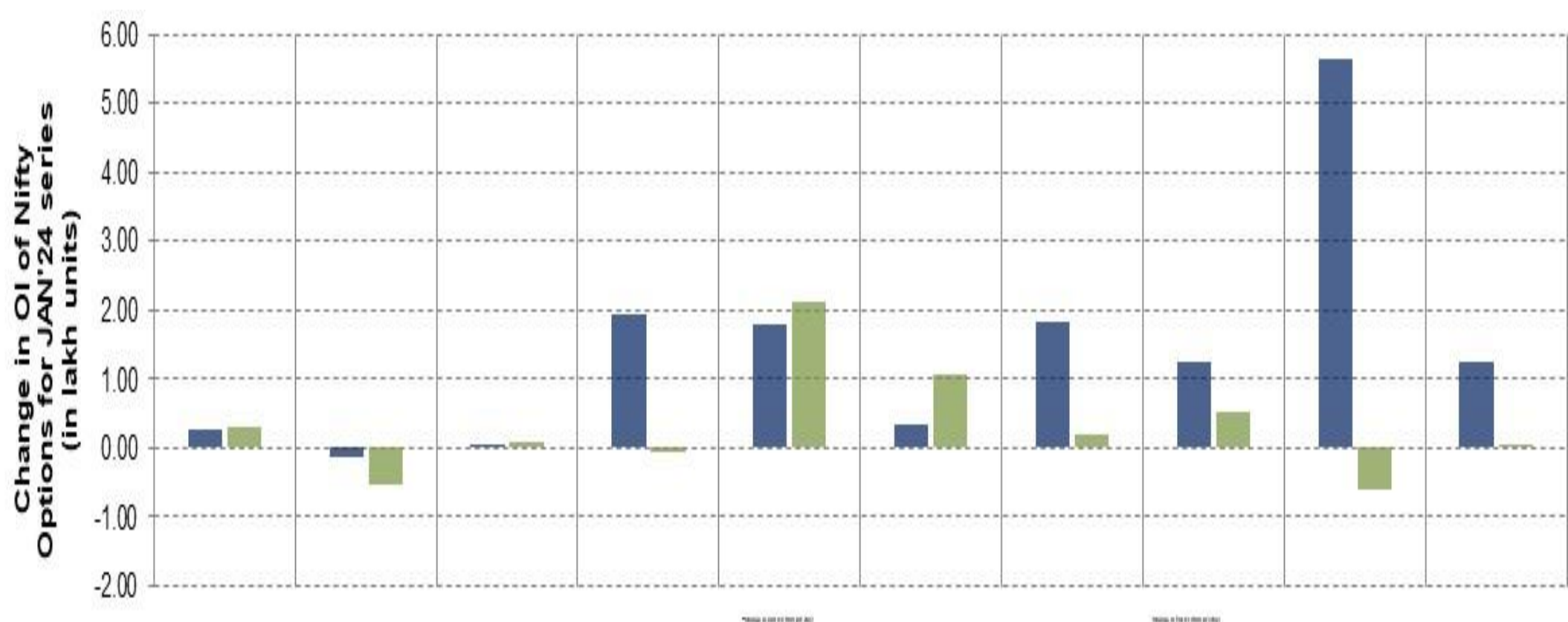
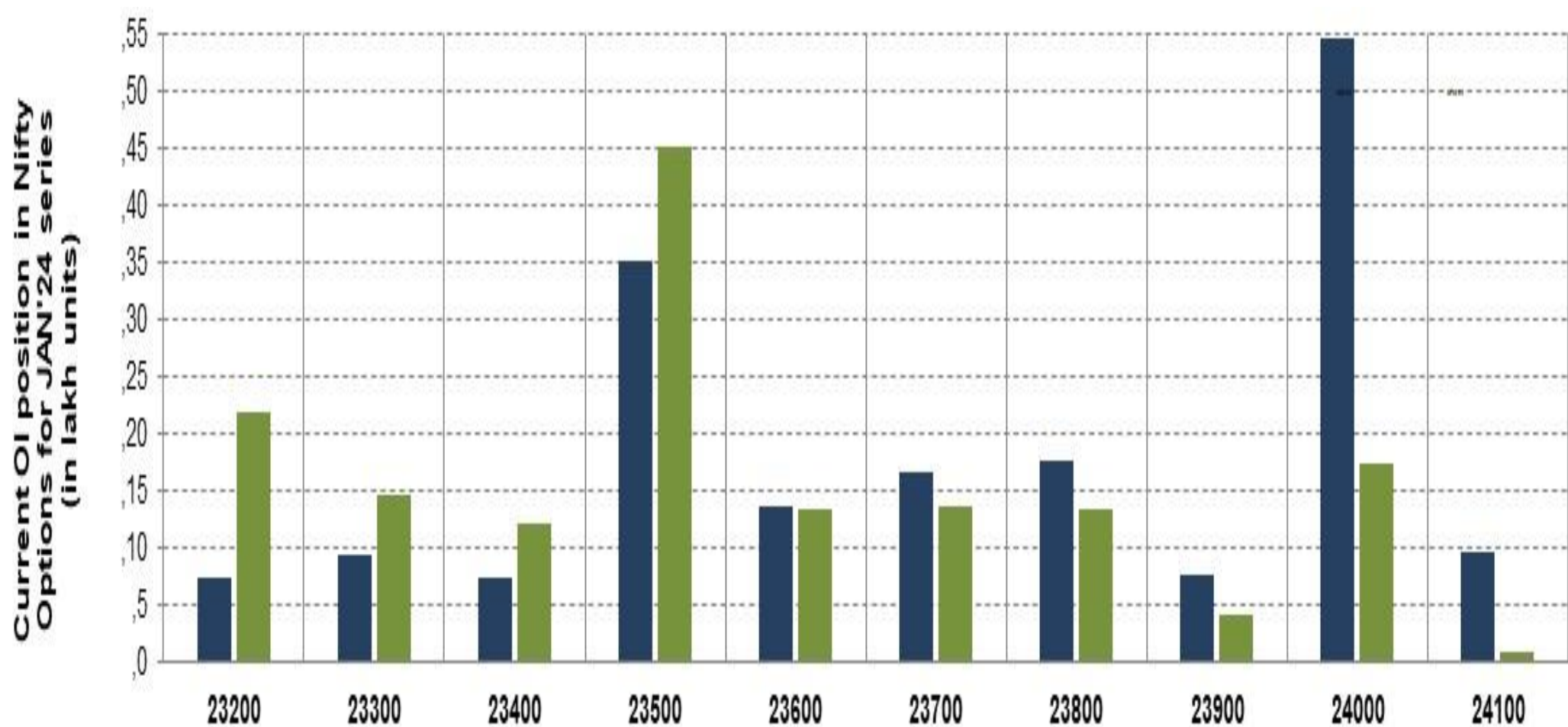
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.56 million in Open Interests is **Strike Price of 24000**
- **Most Active Nifty Put** with an addition of 0.21 millions in Open Interests is **Strike Price of 23600**
- **Maximum Open Interest an outstanding** was 5.45 millions for Calls at **Strike Price of 24000**
- **Maximum Open Interest an outstanding** was 4.50 millions for puts at **Strike Price of 23500**

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