



MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

FEB 11, 2025



The local equity markets continued their southward journey for fifth consecutive day and ended with cut of over a percent. After making cautious start, markets entered into red and added more losses in second half of the session as traders preferred to play safe amid global uncertainty.

Some of the important factors for the markets:

Uncertainty about Trump's tariff hike: Sentiments remained downbeat after the US President Donald Trump signed an order on Monday imposing 25 per cent tariffs on steel and aluminium imports to the US. Besides, Trump's top economic adviser Kevin Hassett reportedly said that India has high tariffs that lock out imports.

Unabated foreign fund outflows: Traders remained cautious amid unabated foreign fund outflows. Foreign Institutional Investors (FIIs) offloaded equities worth Rs 2,463.72 crore on Monday, according to exchange data.

Retail inflation likely to ease in January: India's Consumer price index (CPI) data going to be out on February 12. Traders were hoping that retail inflation is likely to ease in January.

Global front: European markets were trading mostly in red with U.S. President Donald Trump's tariff announcement on metals and an upcoming semi-annual monetary policy testimony from Federal Reserve Chair Jerome Powell in focus. Asian markets settled mostly down in thin trade on Tuesday amidst China's retaliatory tariffs on US goods and increased scrutiny on US tech giants like Nvidia, Apple, and Google, using antitrust investigations and regulatory delays.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	76293.60	-1018.20	-1.32
NIFTY	23071.80	-309.80	-1.32
MIDCAP	40946.22	-1216.14	-2.88
SMLCAP	47369.27	-1665.61	-3.40
BSEFMC	19507.86	-421.00	-2.11
HEALTHCARE	41008.11	-1172.21	-2.78
AUTO	50609.03	-1291.25	-2.49
POWER	5996.00	-116.38	-1.90
REALTY	6744.88	-218.31	-3.14
BSE IT	41256.01	-594.21	-1.42
BANKEX	56025.67	-614.91	-1.09
OIL GAS	23983.21	-466.39	-1.91
METAL	27529.08	-627.81	-2.23
INDIA VIX	14.87	0.42	2.91

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	480	2501	19
BSE	532	3469	96

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	5100	4323	18
NSE CASH	87172	74020	18
NSE F&O	160594	126317	27

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	20.53	3.43	1.38
SENSEX	21.24	3.92	1.16

KEY NUMBERS TRACKER



FII – DII ACTIVITY IN CASH SEGMENT (₹ in Crs)			
FII-DII*	Buy	Sell	Net
DII	13788	9786	4002
FII	11496	15982	(4486)

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)			
FII	Buy	Sell	Net
Index Futures	2893.18	4577.69	(1685)
Index Options	1027879.36	1023921.06	3958
Stock Futures	21028.08	21814.09	(786)
Stock Options	76758.85	78482.66	(1724)

PUT-CALL RATIO		
Index	Current	Previous
NIFTY	0.70	0.75
BANK NIFTY	0.75	0.82

DOLLAR INDEX			
Dollar Index	Current	Previous	% Change
DXY	108.27	108.33	-0.05

10-YEARS G-SEC YIELD			
Country	Current	Previous	% Change
INDIA	6.698	6.713	-0.22
USA	4.525	4.495	0.67

KEY COMMODITIES TRACKER (in \$)			
Commodity	Current	Change Points	% Change
Gold	2906.32	-11.13	-0.38
Silver	31.79	-0.27	-0.84
Crude-Oil	73.22	0.90	1.24
Brent-Crude	76.79	0.92	1.21

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES

Expiry	Close	Change Points	% Change
25 FEB-24 USD-INR	86.96	-0.62	-0.71
25 FEB-24 EUR-INR	89.72	-0.92	-1.01
25 FEB-24 GBP-INR	107.62	-1.10	-1.01
25 FEB-24 JPY- INR	57.41	-0.60	-1.03

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS

Index	Close	S2	S1	Pivot	R1	R2
NIFTY	23072	22746	22909	23150	23312	23553
SENSEX	76294	75214	75754	76570	77110	77927
NIFTY FUTURES	23153	22818	22985	23228	23395	23638
BANK NIFTY	49403	48767	49085	49496	49814	50225
CNX IT	41968	41285	41627	42208	42550	43132
CNX MIDCAP	50888	49327	50108	51332	52113	53338
CNX SMALLCAP	16074	15560	15817	16225	16482	16890
INDIA VIX	14.87	13.12	14.00	14.71	15.59	16.30

INDEX TREND ANALYSIS

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

SECURITIES BAN IN F&O TRADES FOR 12-02-2025

MANAPPURAM

TECHNICAL VIEWS



NIFTY

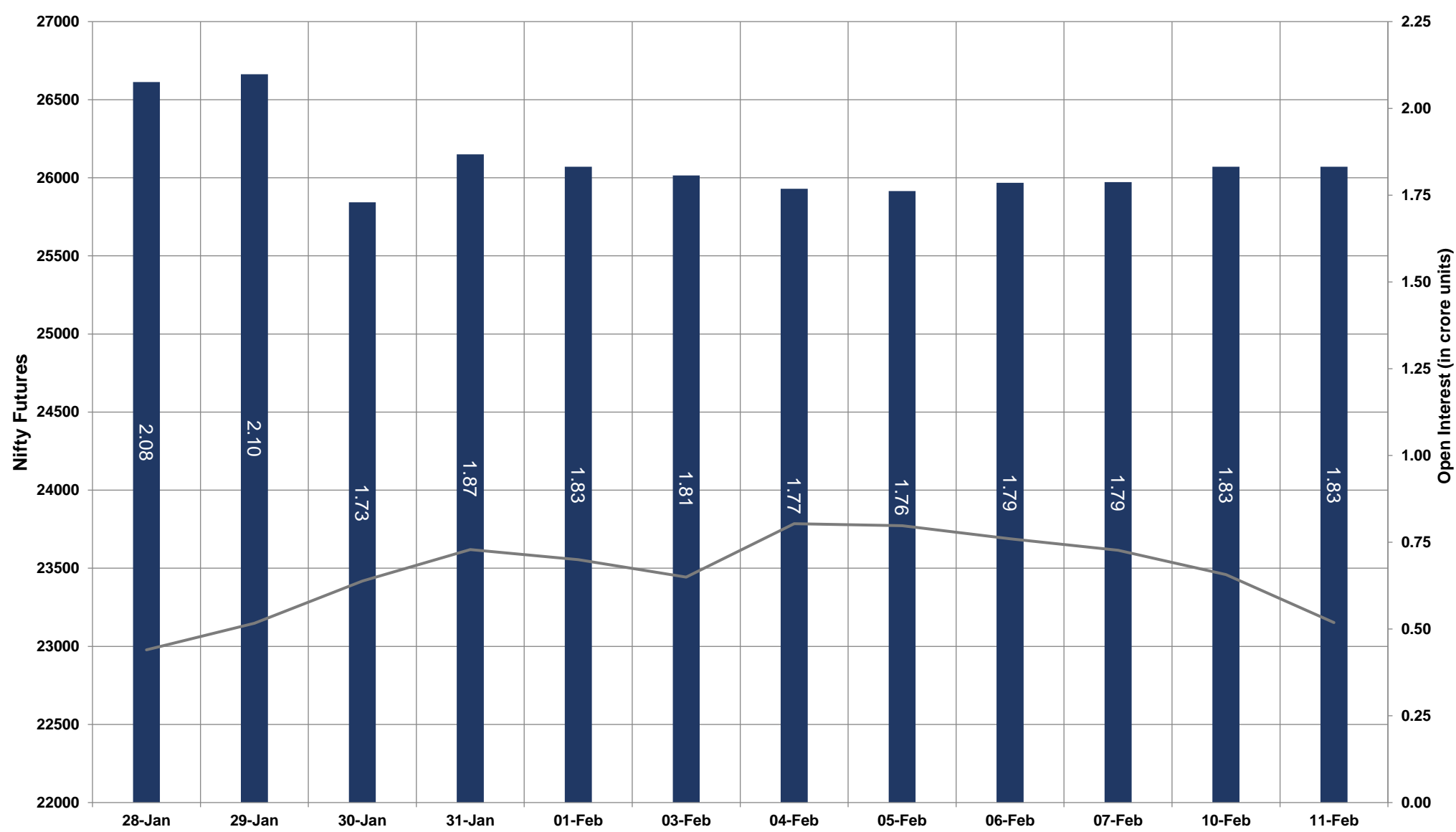


- Nifty Cash = **23071.80 (-1.32%)**
- Resistance levels = **23200** and **23350**
- Support levels = **22950** and **22800**

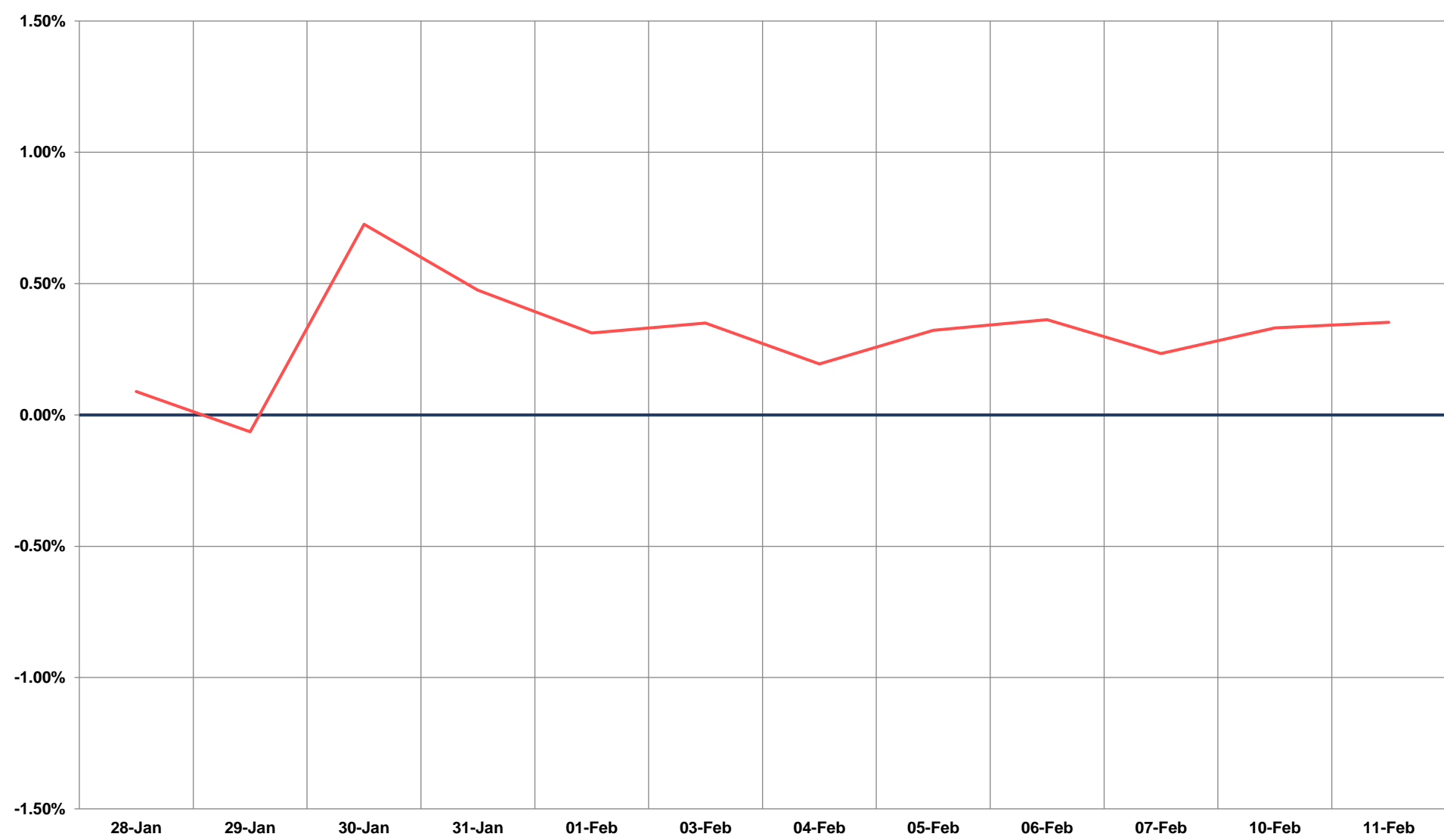
TECHNICAL VIEWS



NIFTY FUTURES



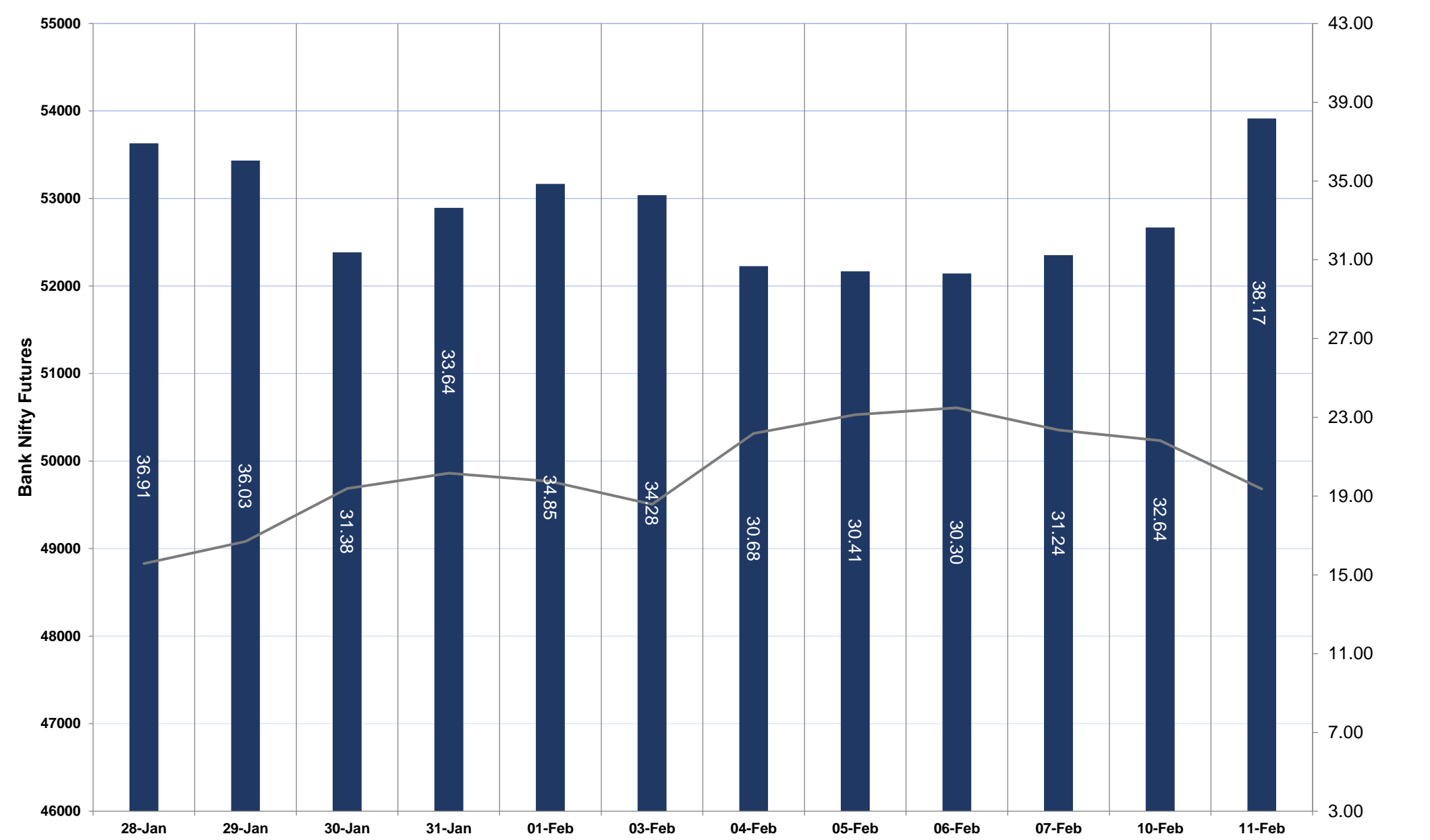
SPREAD: FUTURE & SPOT



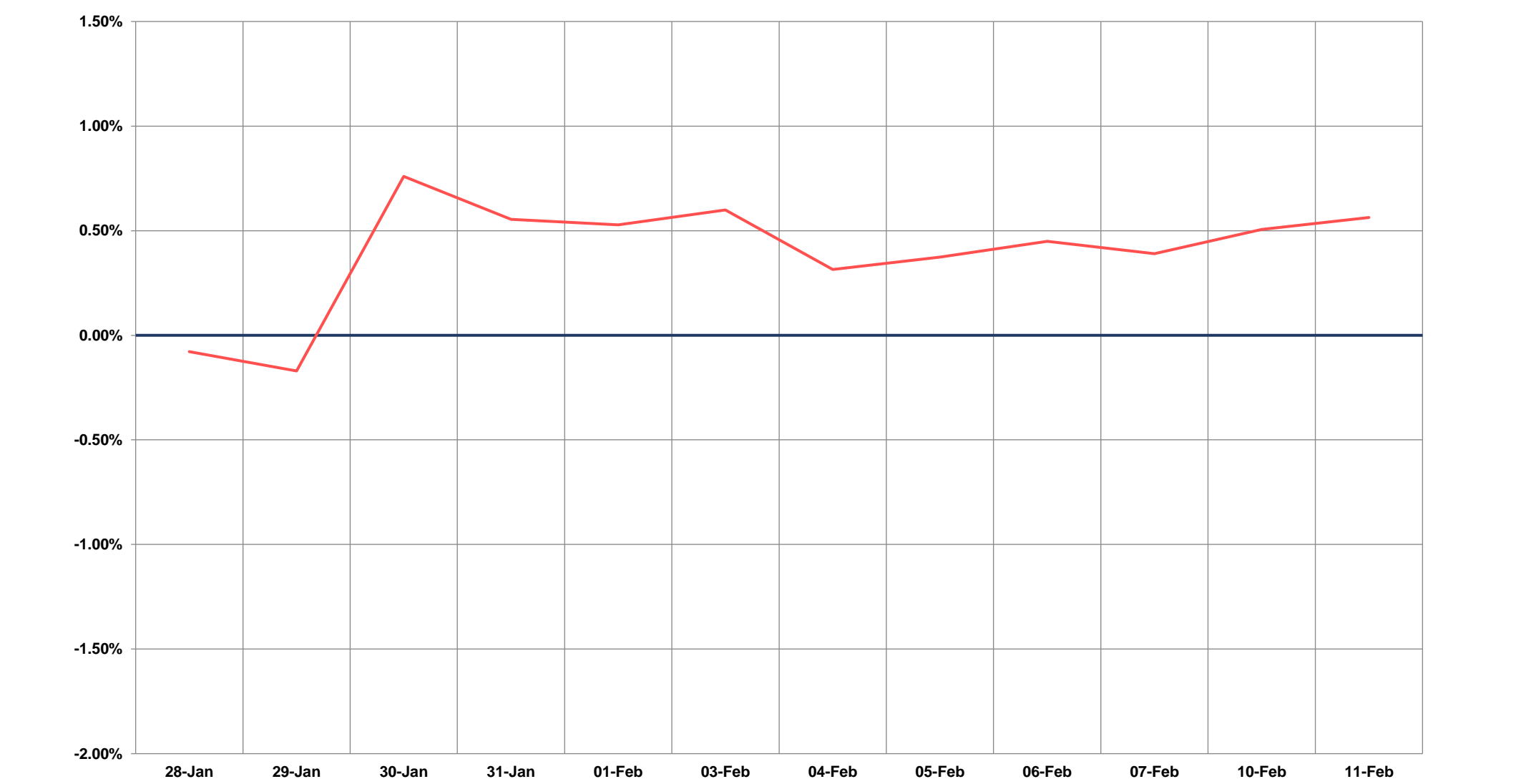
TECHNICAL VIEWS



BANK NIFTY FUTURES



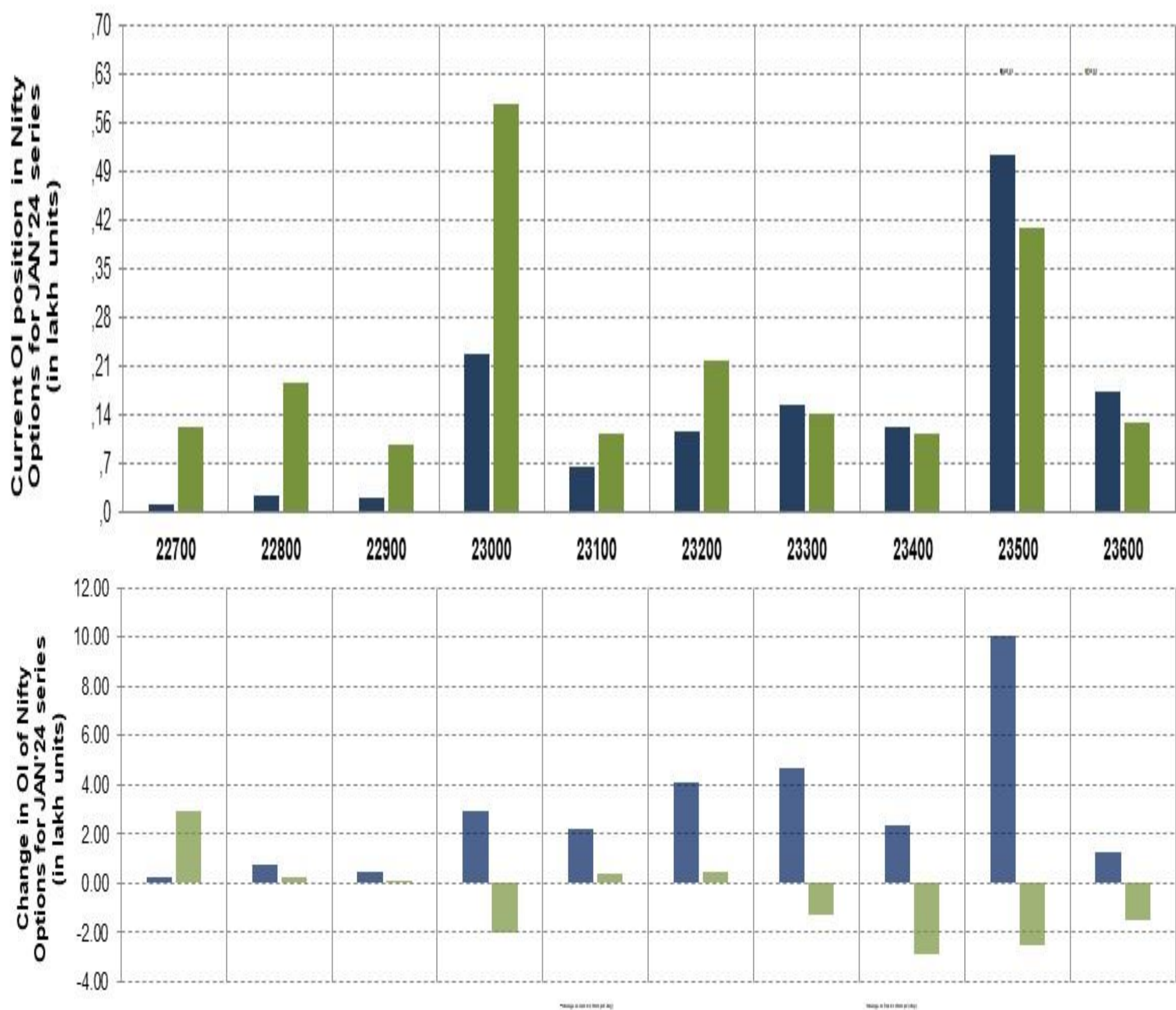
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 1.00 million in Open Interests is **Strike Price of 23500**
- **Most Active Nifty Put** with an addition of 0.29 millions in Open Interests is **Strike Price of 22700**
- **Maximum Open Interest an outstanding** was 5.13 millions for Calls at **Strike Price of 23500**
- **Maximum Open Interest an outstanding** was 5.86 millions for puts at **Strike Price of 23000**

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