



MORNING MANTRA



Daily Derivatives & Market Report

FEB 14, 2025



Indian equity markets came off from day's low, but ended in red on Friday, as Trump's reciprocal tariffs create uncertainties. After making a positive start, soon markets turned volatile amid disappointing Q3 earnings and foreign fund outflows. Markets traded below their neutral line in noon deals, as traders overlooked report that Finance Minister Nirmala Sitharaman's statement the government will continue to take measures to check inflation and ensure that citizens are not burdened.

Some of the important factors in today's trade:

FII's maintain selling approach: Foreign institutional investors (FIIs) extended their selling on seventh day as they sold equities worth Rs 2,789.91 crore on February 13.

Trump unveils reciprocal tariffs plan: Traders were cautious after US President Donald Trump unveiled a roadmap for charging reciprocal tariffs on every country that charges duties on US imports.

WPI Inflation eases to 2.31% in January: An easing wholesale price index (WPI) inflation failed to uplift sentiments in the markets. Inflation based on WPI in India slowed down in the month of January 2025 to 2.31% as against 2.37% recorded in December 2024, aided with easing prices of food articles.

India, US aim for bilateral trade of \$500 billion by 2030: Trades took note of Prime Minister Narendra Modi's statement that the United States and India have set a target of doubling their bilateral trade to \$500 billion by 2030 and will work on concluding a mutually beneficial trade agreement very soon.

Global front: Most of the European markets were trading in red, amid concerns about potential reciprocal tariffs by the United States. U.S. President Donald Trump has announced plans to impose reciprocal tariffs on the nation's trading partners around the world, effective April 2025. Asian markets ended mixed, amid raising fears of a brewing global trade war and its impact on inflation. Moreover, bets that Federal Reserve will keep the interest rate unchanged for prolonged period got intensified after stronger than expected US PPI and CPI data.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	75939.21	-102.15	-0.44
NIFTY	75939.21	-199.76	-0.26
MIDCAP	39731.79	-1056.32	-2.59
SMLCAP	45411.25	-1522.44	-3.24
BSEFMC	19233.29	-84.72	-0.44
HEALTHCARE	39887.39	-1135.89	-2.77
AUTO	49313.03	-707.29	-1.41
POWER	5826.15	-158.61	-2.65
REALTY	6483.80	-134.35	-2.03
BSE IT	40576.64	-29.96	-0.07
BANKEX	55824.95	-290.96	-0.52
OIL GAS	23352.42	-401.62	-1.69
METAL	27621.26	-441.09	-1.57
INDIA VIX	15.02	0.07	0.43

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	625	2348	25
BSE	681	3320	82

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	5491	4676	17
NSE CASH	85659	84309	2
NSE F&O	179902	167562	7

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	20.42	3.41	1.46
SENSEX	21.14	3.91	1.23

KEY NUMBERS TRACKER



FII – DII ACTIVITY IN CASH SEGMENT (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	12827	8463	4364
FII	9064	13359	(4295)

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	3829.00	4687.73	(859)
Index Options	634638.67	626867.79	7771
Stock Futures	19408.17	18922.44	486
Stock Options	89239.66	91934.82	(2695)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	0.77	0.75
BANK NIFTY	0.69	0.79

DOLLAR INDEX

Dollar Index	Current	Previous	% Change
DXY	106.88	107.06	-0.17

10-YEARS G-SEC YIELD

Country	Current	Previous	% Change
INDIA	6.708	6.712	-0.06
USA	4.532	4.525	0.15

KEY COMMODITIES TRACKER (in \$)

Commodity	Current	Change Points	% Change
Gold	2939.68	8.83	0.30
Silver	33.32	0.98	3.04
Crude-Oil	71.59	0.30	0.42
Brent-Crude	75.40	0.38	0.51

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES

Expiry	Close	Change Points	% Change
25 FEB-24 USD-INR	86.80	-0.20	-0.23
25 FEB-24 EUR-INR	91.03	0.28	0.31
25 FEB-24 GBP-INR	109.27	0.56	0.52
25 FEB-24 JPY- INR	57.20	0.23	0.41

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS

Index	Close	S2	S1	Pivot	R1	R2
NIFTY	22929	22587	22758	22946	23117	23305
SENSEX	75939	74911	75425	75954	76468	76997
NIFTY FUTURES	22996	22657	22826	23016	23185	23375
BANK NIFTY	49099	48264	48682	49137	49555	50011
CNX IT	41311	40643	40977	41292	41626	41941
CNX MIDCAP	49654	47965	48810	49984	50829	52004
CNX SMALLCAP	15407	14786	15097	15565	15875	16344
INDIA VIX	15.02	13.70	14.36	15.02	15.68	16.34

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

SECURITIES BAN IN F&O TRADES FOR 17-02-2025

DEEPAKNTR

TECHNICAL VIEWS



NIFTY

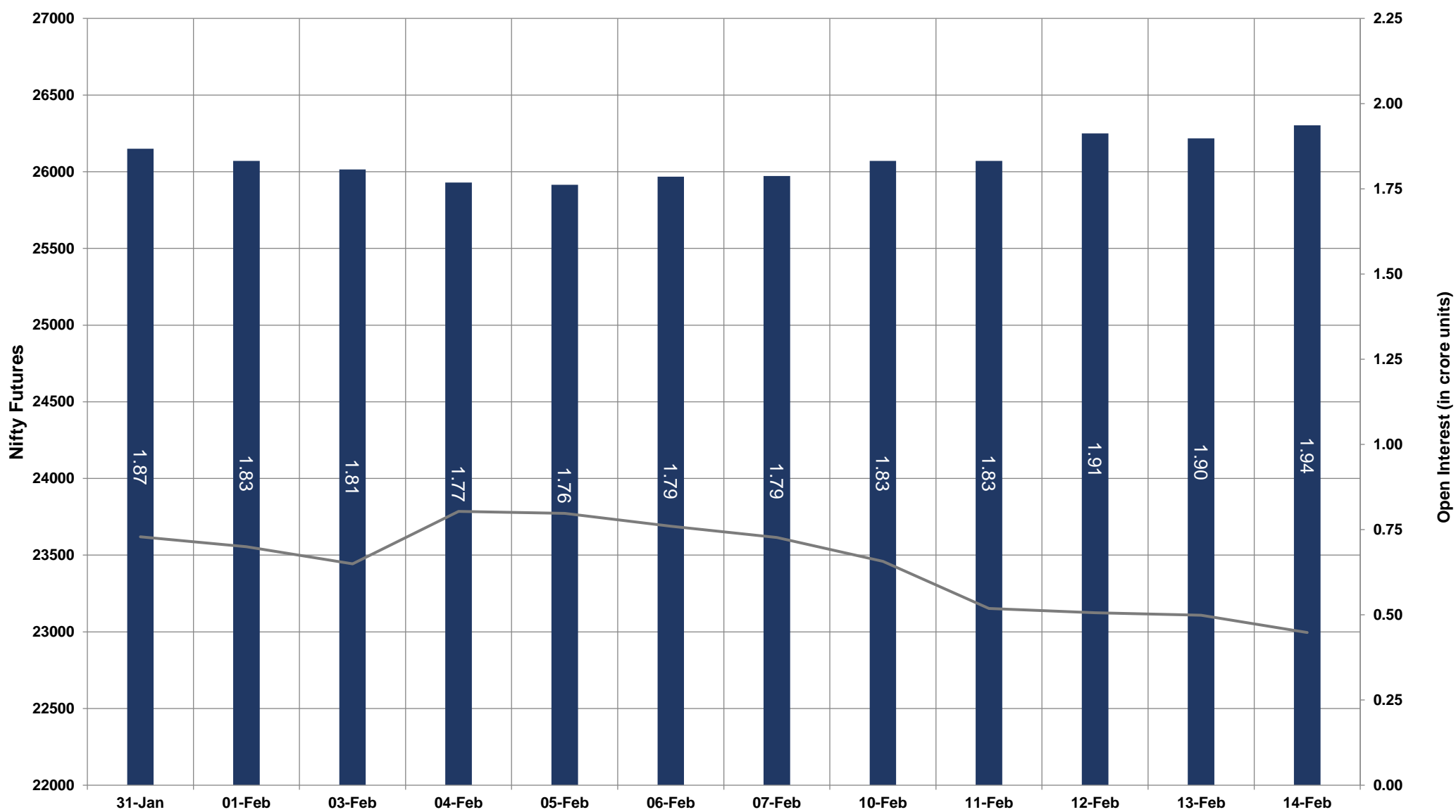


- Nifty Cash = **22929.25 (-0.44%)**
- Resistance levels = **23200** and **23350**
- Support levels = **22950** and **22800**

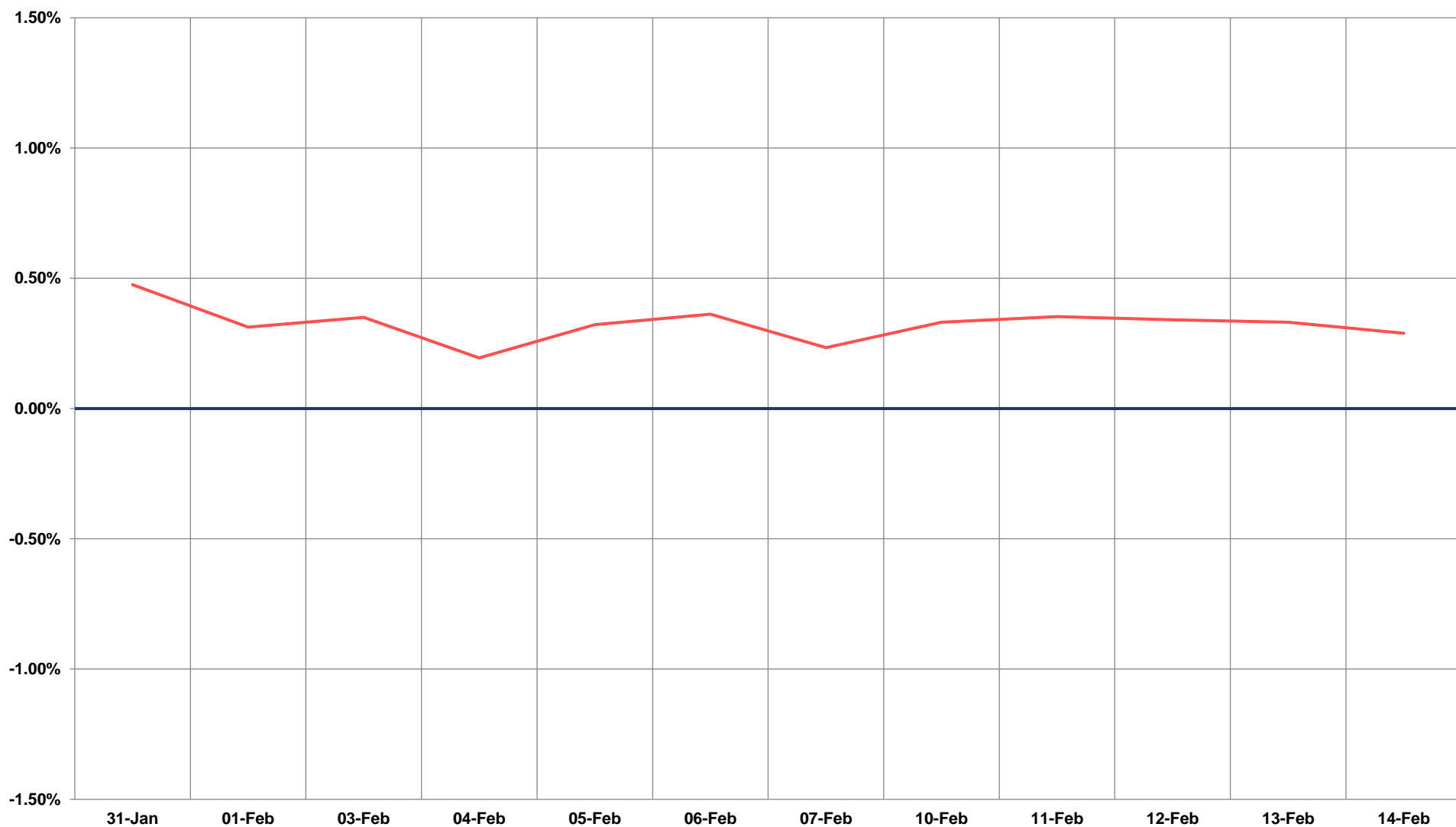
TECHNICAL VIEWS



NIFTY FUTURES



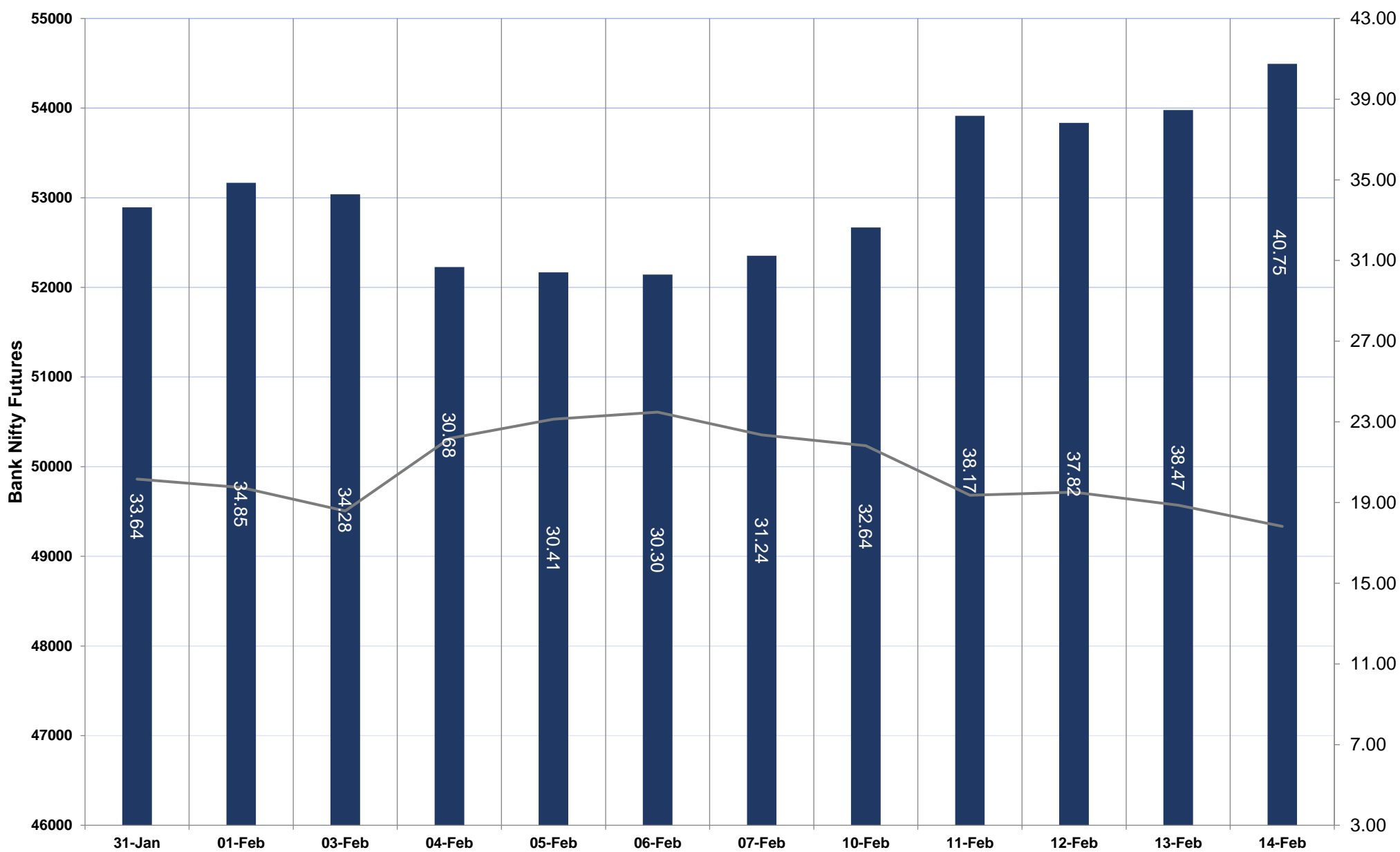
SPREAD: FUTURE & SPOT



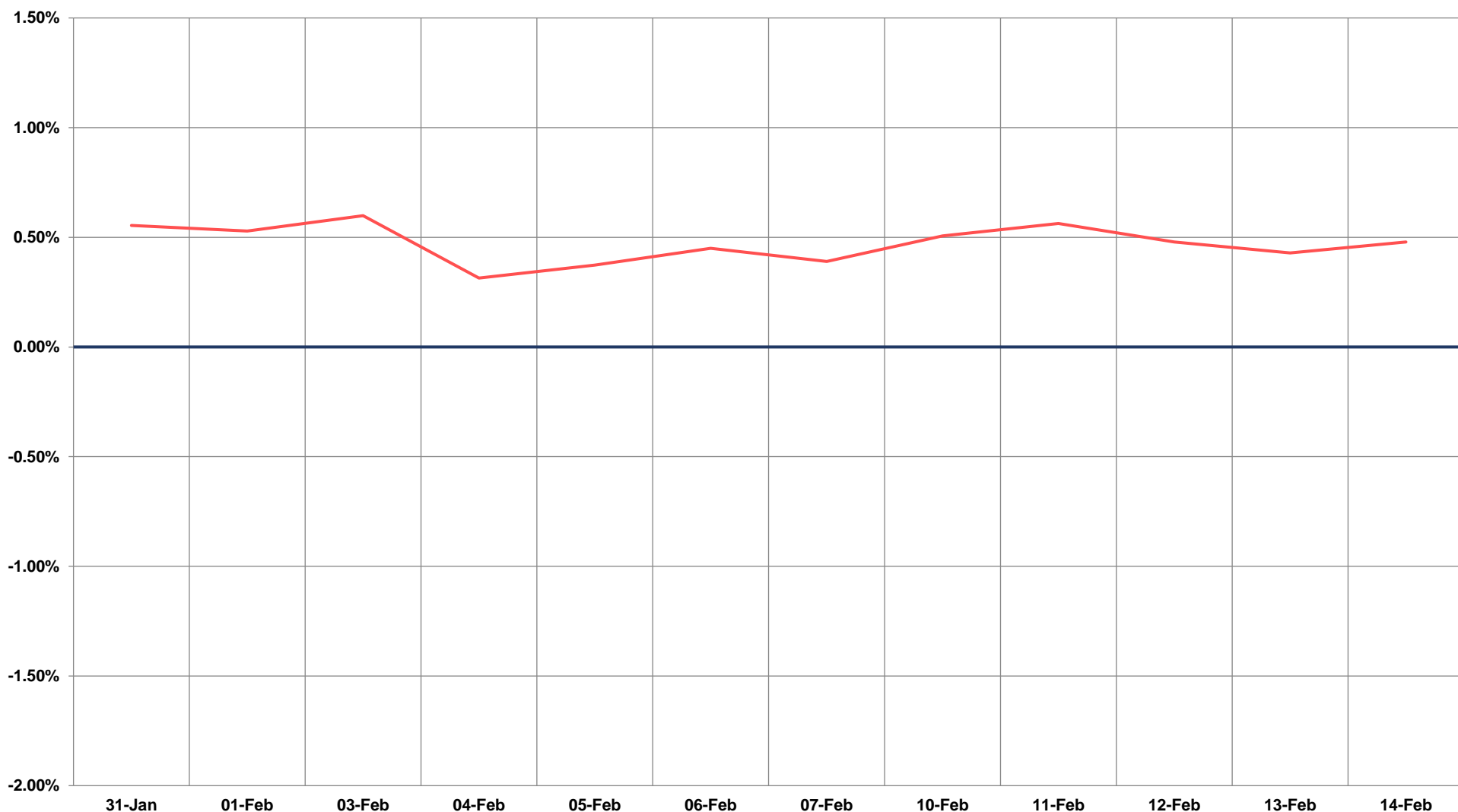
TECHNICAL VIEWS



BANK NIFTY FUTURES



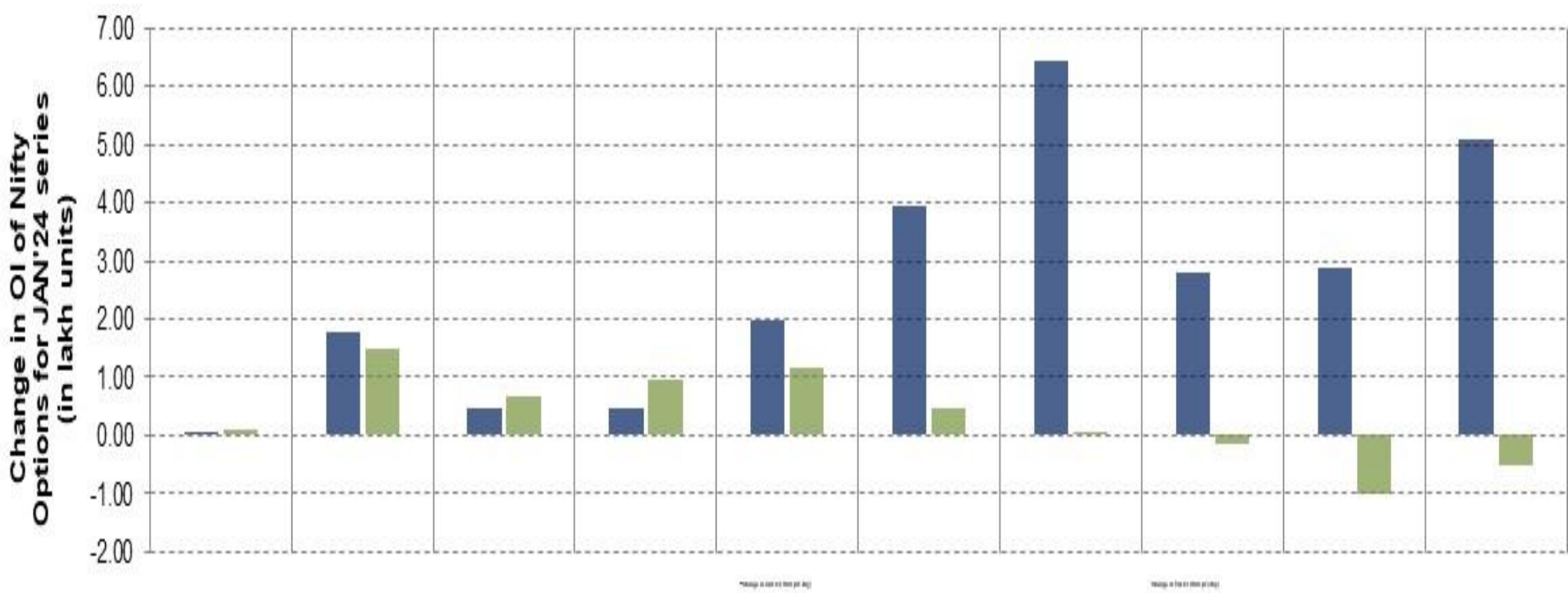
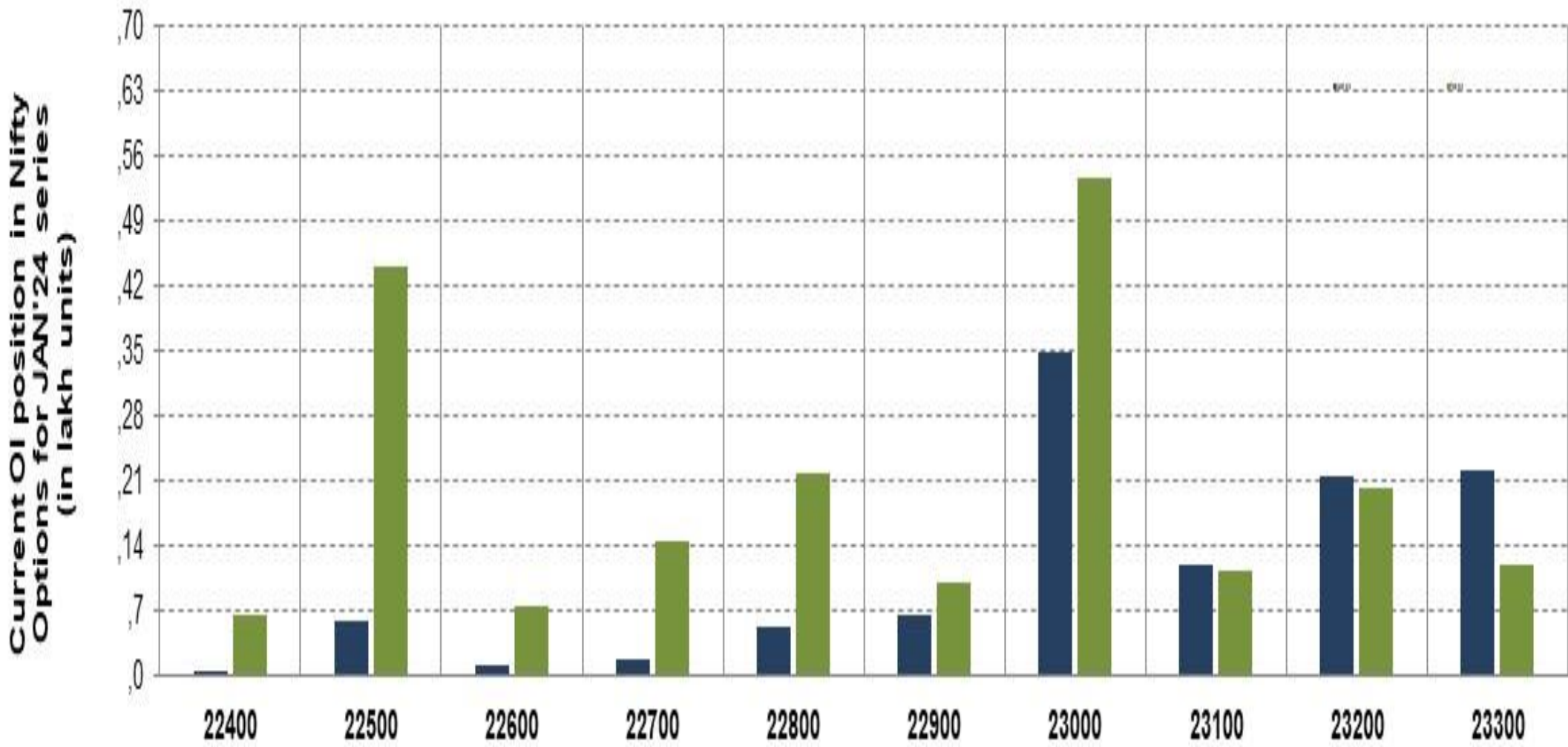
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.64 million in Open Interests is **Strike Price of 23000**
- **Most Active Nifty Put** with an addition of 0.14 millions in Open Interests is **Strike Price of 22500**
- **Maximum Open Interest an outstanding** was 3.47 millions for Calls at **Strike Price of 23000**
- **Maximum Open Interest an outstanding** was 5.35 millions for puts at **Strike Price of 23000**

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