



MORNING MANTRA



Daily Derivatives & Market Report

FEB 17, 2025



After witnessing selling pressure in initial trade, local equity benchmarks snapped eight-day losing streak on Monday amid reports that Trump's tariff reciprocity on Indian exports is likely to be limited. Markets made a gap-down opening, but managed to come off from day's low in noon deals, as investors took some supports with Institute of Chartered Accountants of India (ICAI) stating that the new Income Tax Bill will simplify the country's six-decade old tax structure as well as help boost growth of MSMEs.

Some of the important factors in today's trade:

India, US trade agreement lifts business confidence: Sentiments were upbeat with Commerce and Industry Minister Piyush Goyal's statement that the announcement to negotiate a bilateral trade agreement between India and the US has boosted business confidence in both countries, as it can help further strengthen economic ties by leveraging their competitive strengths.

India remains fastest-growing large economy: Traders took some support with Union Minister Ashwini Vaishnaw's statement that the country remains the fastest-growing large economy while keeping inflation under control.

Foreign fund outflows intensify: Foreign Portfolio Investors (FPIs) offloaded equities worth Rs 4,294.69 crore on Friday. The total outflow by FPIs has reached Rs 99,299 crore -- near Rs 1 lakh crore -- in 2025 so far.

Global front: Most of the European markets were trading in green, despite easing concerns over a global trade war after U.S. President Donald Trump decided to delay the implementation of new reciprocal tariff plans. Most of the Asian markets ended in green, following the mixed cues from Wall Street on Friday. Sentiments got boosted after Hang Seng is trading near its four-month high whetted by the optimism for China's tech sector after the emergence of a low-cost AI model.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	75996.86	57.65	0.08
NIFTY	22959.50	30.25	0.13
MIDCAP	39932.63	200.84	0.51
SMLCAP	45156.89	-254.36	-0.56
BSEFMC	19181.85	-51.44	-0.27
HEALTHCARE	40340.44	453.05	1.14
AUTO	49089.03	-224.00	-0.45
POWER	5869.95	43.80	0.75
REALTY	6471.98	-11.82	-0.18
BSE IT	40301.57	-275.07	-0.68
BANKEX	55970.46	145.51	0.26
OIL GAS	23524.07	171.65	0.74
METAL	27829.90	208.64	0.76
INDIA VIX	15.72	0.70	4.66

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1198	1787	33
BSE	1354	2733	134

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	4727	5491	(14)
NSE CASH	82681	85659	(3)
NSE F&O	160082	179902	(11)

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	20.44	3.42	1.42
SENSEX	21.16	3.91	1.20

KEY NUMBERS TRACKER



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

FII-DII*	Buy	Sell	Net
DII	12504	7744	4760
FII	6830	10765	(3935)

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	4262.82	3674.51	588
Index Options	574974.66	576735.32	(1761)
Stock Futures	20754.28	18297.71	2457
Stock Options	84166.62	84671.44	(505)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	0.87	0.77
BANK NIFTY	0.75	0.69

DOLLAR INDEX

Dollar Index	Current	Previous	% Change
DXY	106.79	107.06	-0.25

10-YEARS G-SEC YIELD

Country	Current	Previous	% Change
INDIA	6.693	6.705	-0.18
USA	4.497	4.473	0.54

KEY COMMODITIES TRACKER (in \$)

Commodity	Current	Change Points	% Change
Gold	2899.48	17.88	0.62
Silver	32.40	0.41	1.30
Crude-Oil	71.06	0.32	0.45
Brent-Crude	75.06	0.36	0.48

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES

Expiry	Close	Change Points	% Change
25 FEB-24 USD-INR	86.97	0.09	0.10
25 FEB-24 EUR-INR	91.23	0.22	0.25
25 FEB-24 GBP-INR	109.55	0.29	0.26
25 FEB-24 JPY- INR	57.63	0.43	0.76

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS

Index	Close	S2	S1	Pivot	R1	R2
NIFTY	22960	22638	22799	22886	23047	23135
SENSEX	75997	75031	75514	75778	76261	76525
NIFTY FUTURES	23026	22744	22885	22967	23108	23190
BANK NIFTY	49259	48241	48750	49035	49543	49828
CNX IT	41073	40311	40692	40974	41355	41636
CNX MIDCAP	49850	48006	48928	49425	50347	50844
CNX SMALLCAP	15413	14855	15134	15323	15602	15791
INDIA VIX	15.72	13.70	14.71	15.51	16.52	17.32

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 18-02-2025

DEEPAKNTR, MANAPPURAM

TECHNICAL VIEWS



NIFTY

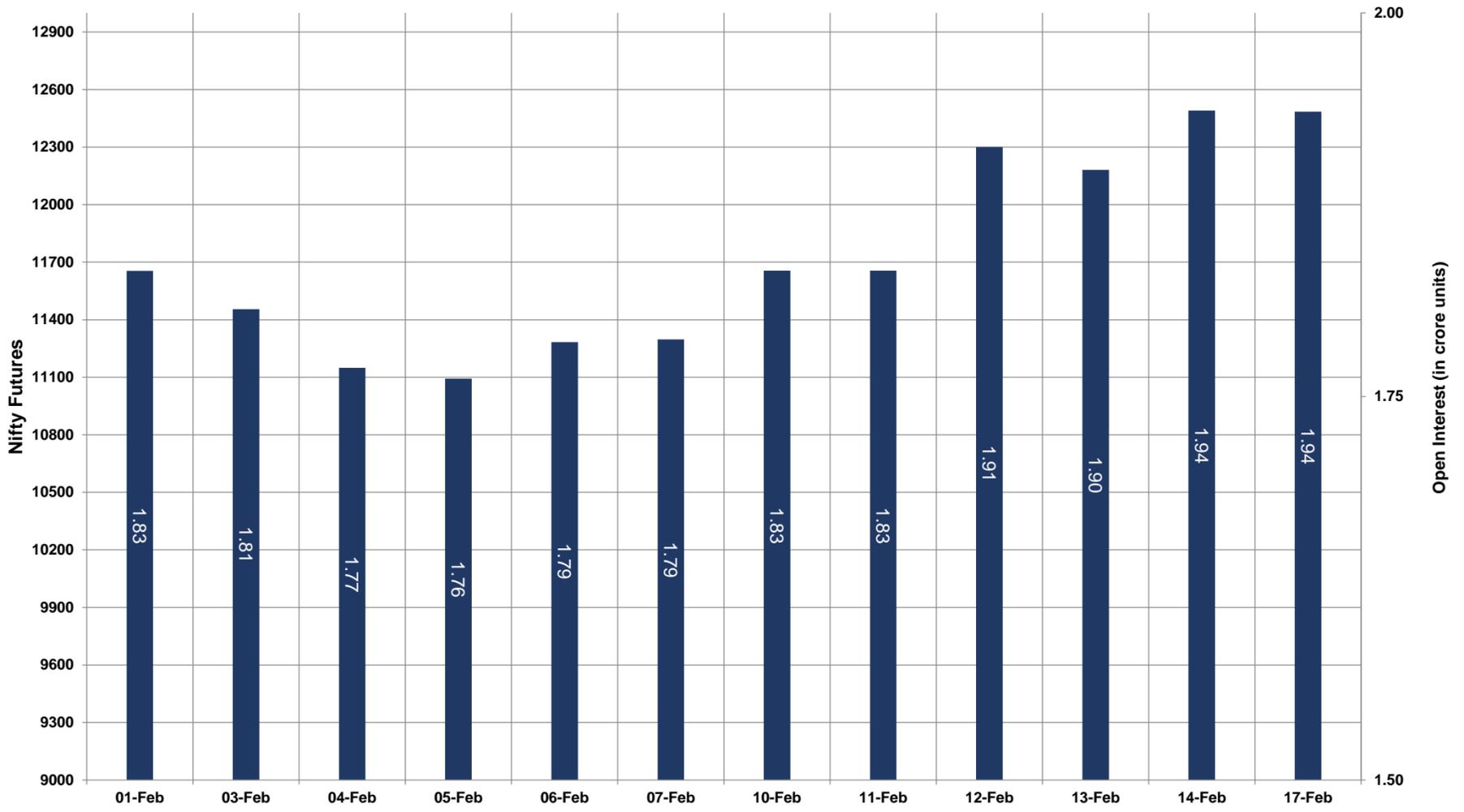


- Nifty Cash = **22959.50 (0.13%)**
- Resistance levels = **23150** and **23300**
- Support levels = **22800** and **22660**

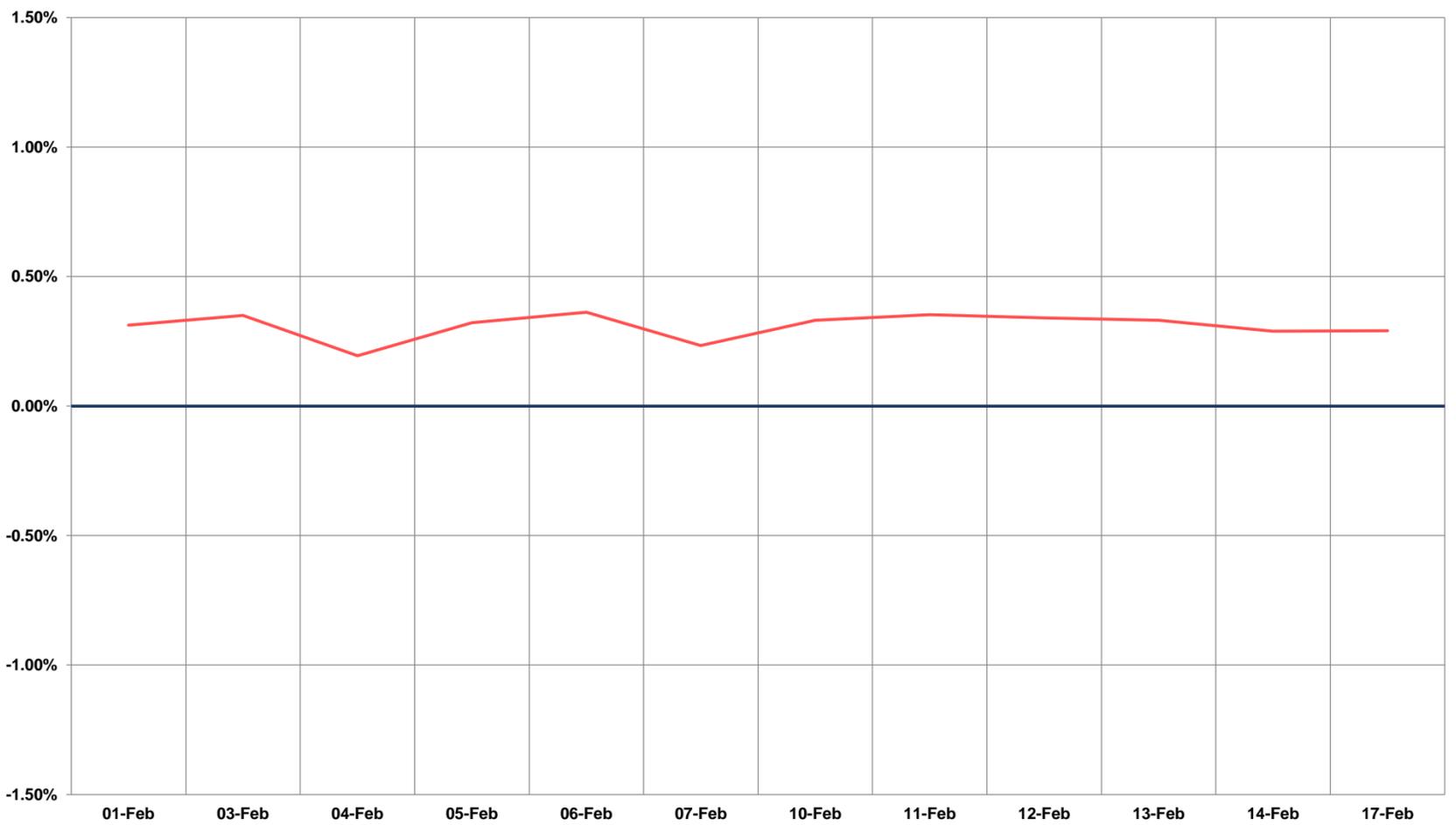
TECHNICAL VIEWS



NIFTY FUTURES



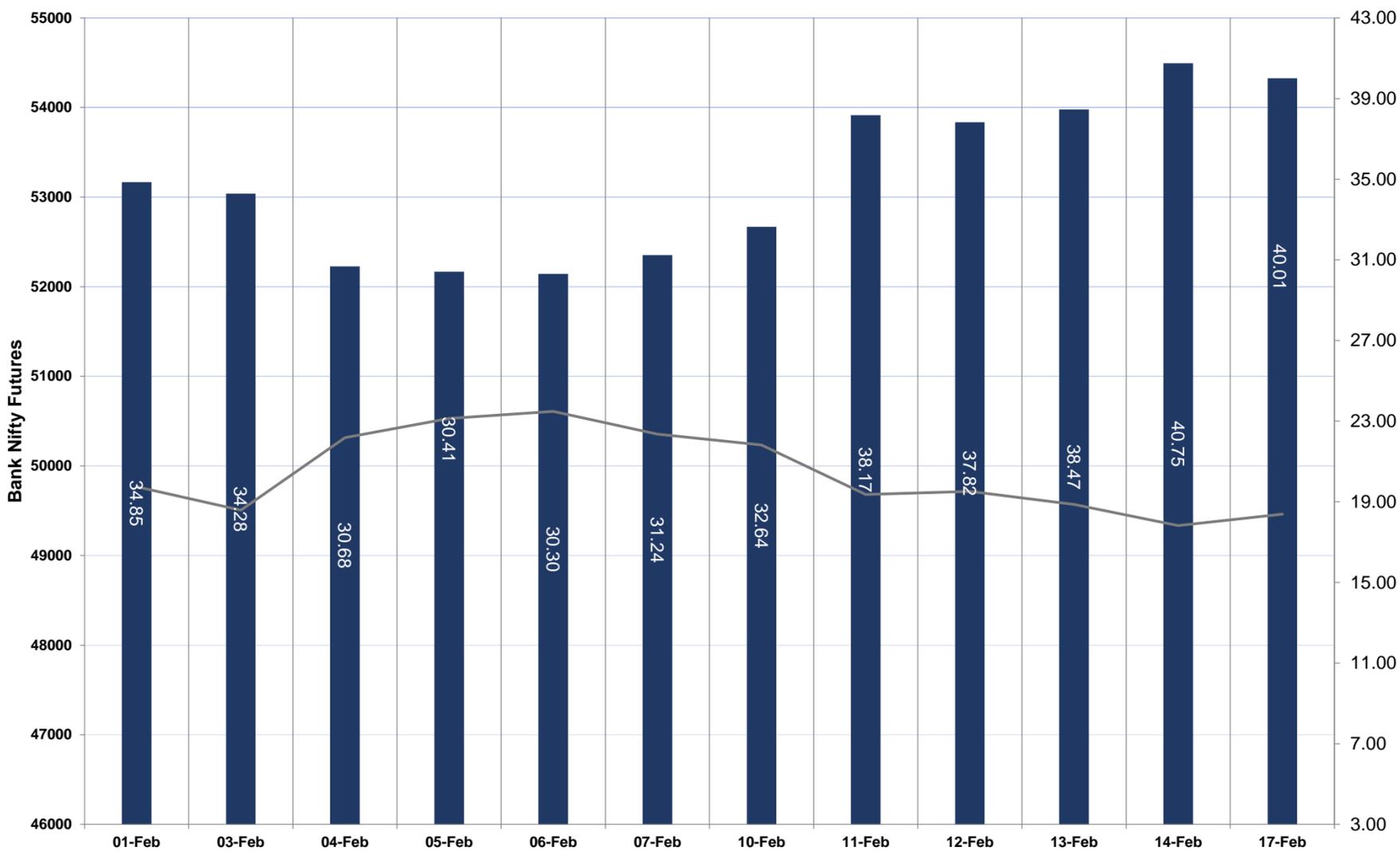
SPREAD: FUTURE & SPOT



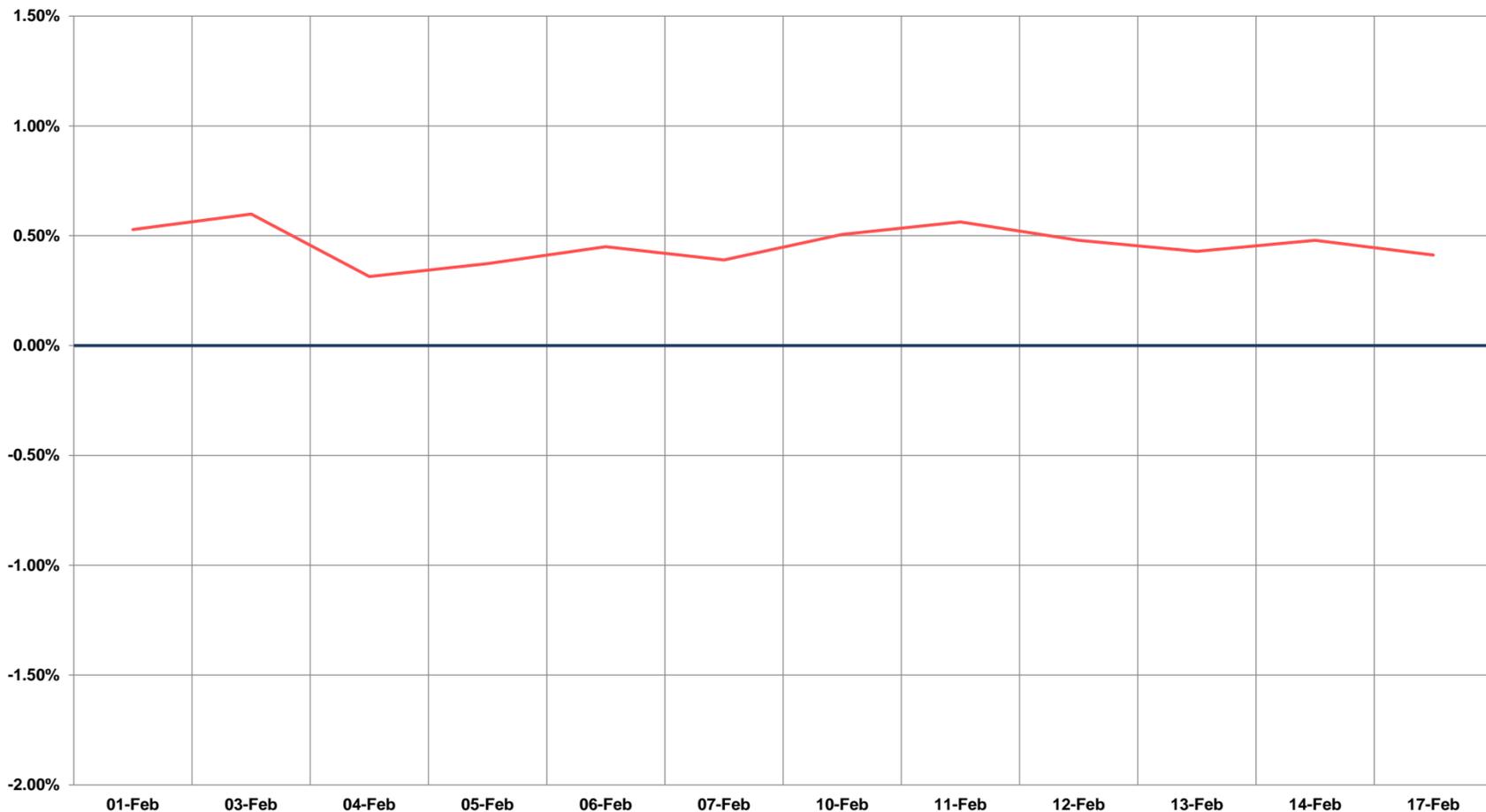
TECHNICAL VIEWS



BANK NIFTY FUTURES



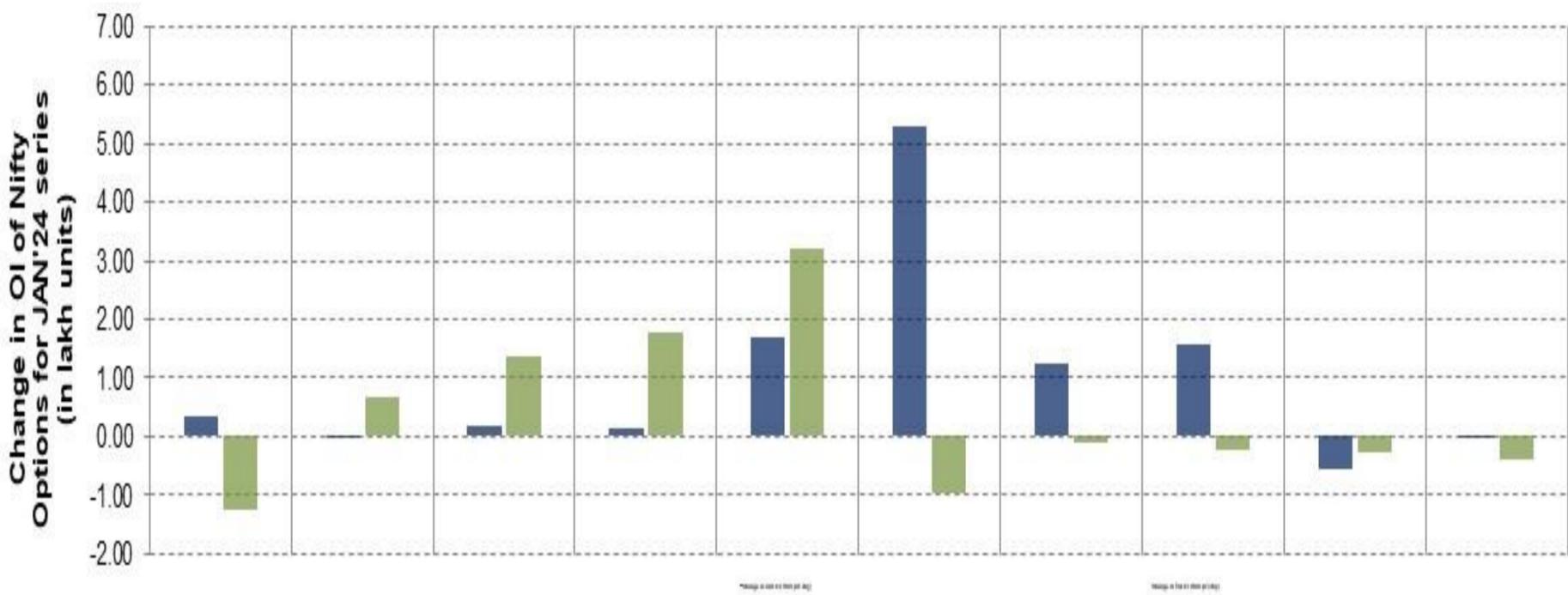
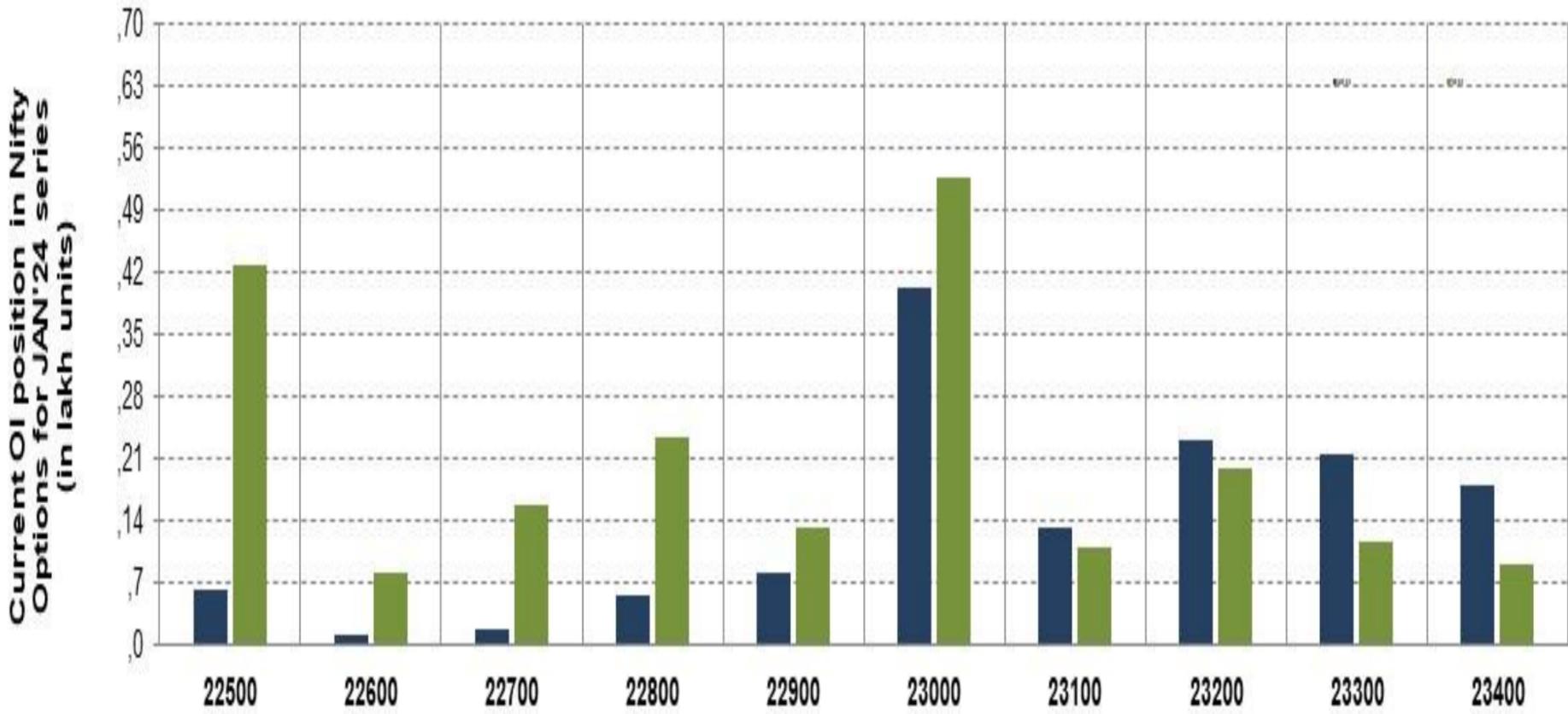
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.52 million in Open Interests is **Strike Price of 23000**
- **Most Active Nifty Put** with an addition of 0.32 millions in Open Interests is **Strike Price of 22900**
- **Maximum Open Interest** an outstanding was 4.00 millions for Calls at **Strike Price of 23000**
- **Maximum Open Interest** an outstanding was 5.25 millions for puts at **Strike Price of 23000**

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