



MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

FEB 20, 2025



Prolonging their southward moment for third straight session, Indian equity benchmarks ended flat with minor losses, amid Fed caution and lingering tariff concerns. Indices made gap-down opening, as tariff worries persisted, and the US Fed's minutes showed policymakers are more inclined to keep interest rates steady amid stubborn inflation. In afternoon session, markets came off from day's low but failed to enter green terrain, as traders took note of report that Reserve Bank of India (RBI) in its latest monthly bulletin-February 2025 stated that the global economy continues to grow at a steady but moderate pace, with divergent outlook across countries amid rapidly evolving political and technological landscapes.

Some of the important factors in today's trade:

FII's selling resumes: Sentiments were dampened with Foreign Institutional Investors (FIIs) offloaded equities worth Rs 1,881.30 crore on Wednesday after a day's breather, according to exchange data.

High-frequency indicators show in economic growth: Traders took a note of RBI Bulletin stated that high frequency indicators, like vehicles sales, air traffic, steel consumption and GST E-way bills, point towards a sequential pickup in momentum of economic activity during the second half of the fiscal 2024-25.

US reciprocal tariffs to have minimal impact on India: Traders overlooked S&P Global Ratings' statement that the impact of the US reciprocal tariff will be limited on India as the economy is domestically oriented with less reliance on exports. It also said India will clock a 6.7-6.8 per cent GDP growth over the next two years.

Global front: Most of the European markets were trading in green, as investors track quarterly earnings updates and continue to follow geopolitical news. Asian markets ended in red, following another batch of data highlighting ongoing weakness in China's economy. China's consumer inflation eased while producer prices stayed stubbornly in deflation in May, bolstering the case for fiscal stimulus as the world's second-largest economy shrugs off monetary easing.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	75735.96	-203.22	-0.27
NIFTY	22913.15	-19.75	-0.09
MIDCAP	40854.88	478.20	1.18
SMLCAP	46054.94	599.11	1.32
BSEFMC	19040.91	-6.73	-0.04
HEALTHCARE	40263.69	159.55	0.40
AUTO	49419.37	634.08	1.30
POWER	6110.17	130.82	2.1.9
REALTY	6649.83	74.95	1.14
BSE IT	40046.33	17.14	0.04
BANKEX	56179.27	-282.05	-0.50
OIL GAS	24264.04	395.29	1.66
METAL	28843.66	570.82	2.02
INDIA VIX	14.68	-0.74	-4.80

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	2188	744	44
BSE	2668	1274	112

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	4051	4917	(18)
NSE CASH	80360	84192	(5)
NSE F&O	165879	175821	(6)

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	20.38	3.41	1.42
SENSEX	21.08	3.90	1.21

KEY NUMBERS TRACKER



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

FII-DII*	Buy	Sell	Net
DII	13180	9273	3908
FII	11132	14443	(3312)

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	3182.96	4244.22	(1061)
Index Options	1607339.67	1613558.48	(6219)
Stock Futures	28792.58	27282.16	1510
Stock Options	82032.63	81302.87	730

PUT-CALL RATIO

Index	Current	Previous
NIFTY	0.86	0.80
BANK NIFTY	0.78	0.82

DOLLAR INDEX

Dollar Index	Current	Previous	% Change
DXY	106.92	107.16	-0.23

10-YEARS G-SEC YIELD

Country	Current	Previous	% Change
INDIA	6.704	6.682	0.33
USA	4.515	4.535	-0.44

KEY COMMODITIES TRACKER (in \$)

Commodity	Current	Change Points	% Change
Gold	2953.79	18.32	0.62
Silver	33.14	0.45	1.38
Crude-Oil	72.11	0.01	0.02
Brent-Crude	76.10	0.06	0.08

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES

Expiry	Close	Change Points	% Change
25 FEB-24 USD-INR	86.65	-0.35	-0.40
25 FEB-24 EUR-INR	90.44	-0.58	-0.64
25 FEB-24 GBP-INR	109.28	-0.30	-0.27
25 FEB-24 JPY- INR	58.04	0.40	0.70

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS

Index	Close	S2	S1	Pivot	R1	R2
NIFTY	22913	22772	22843	22883	22954	22994
SENSEX	75736	75333	75535	75664	75866	75996
NIFTY FUTURES	22943	22814	22878	22919	22984	23025
BANK NIFTY	49335	49009	49172	49314	49477	49619
CNX IT	40866	40554	40710	40857	41014	41161
CNX MIDCAP	51164	49839	50502	50858	51520	51877
CNX SMALLCAP	15748	15293	15521	15644	15871	15995
INDIA VIX	14.68	13.81	14.25	15.07	15.51	16.33

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

SECURITIES BAN IN F&O TRADES FOR 21-02-2025

MANAPPURAM	
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TECHNICAL VIEWS



NIFTY

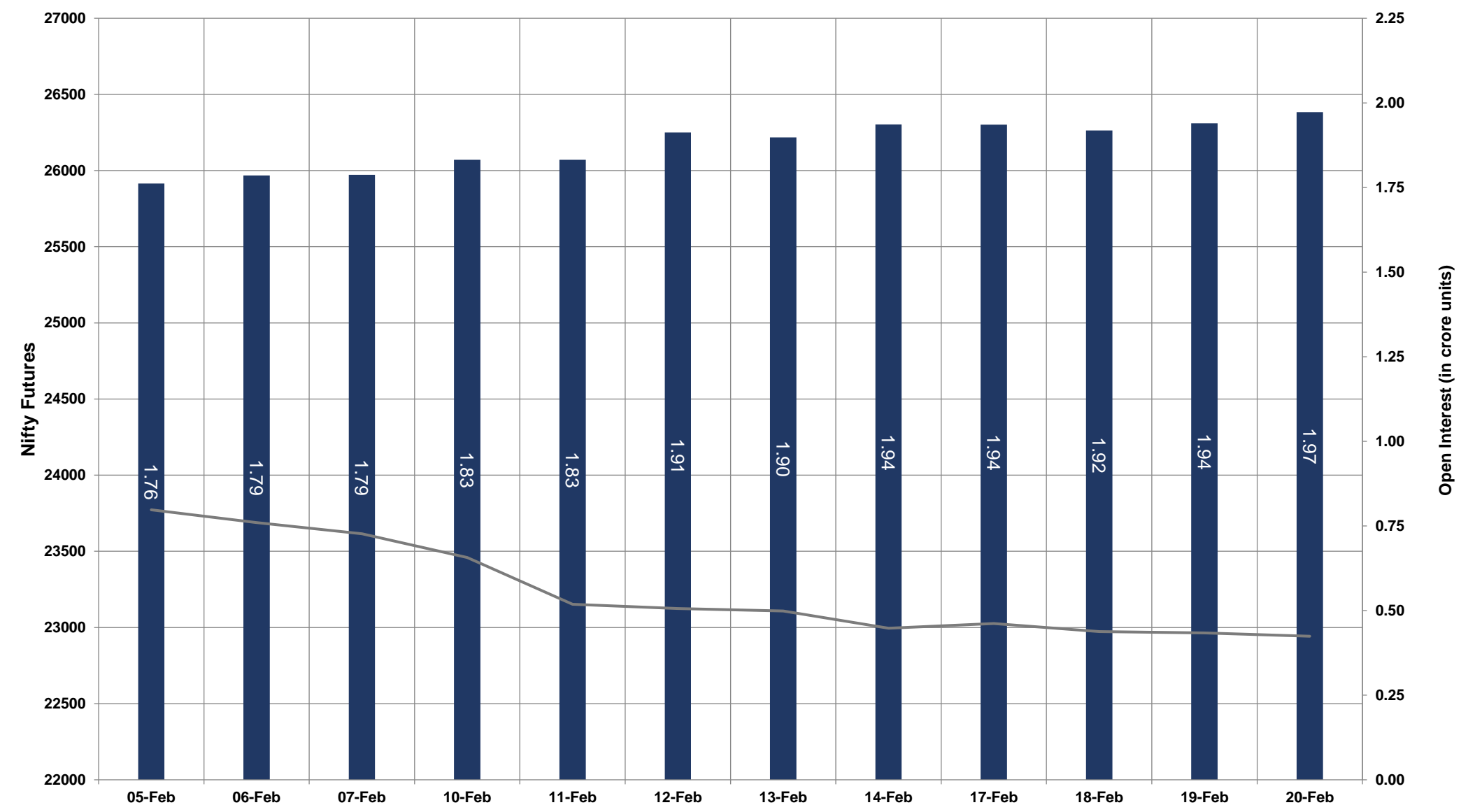


- Nifty Cash = **22913.15 (-0.09%)**
- Resistance levels = **23150** and **23300**
- Support levels = **22800** and **22660**

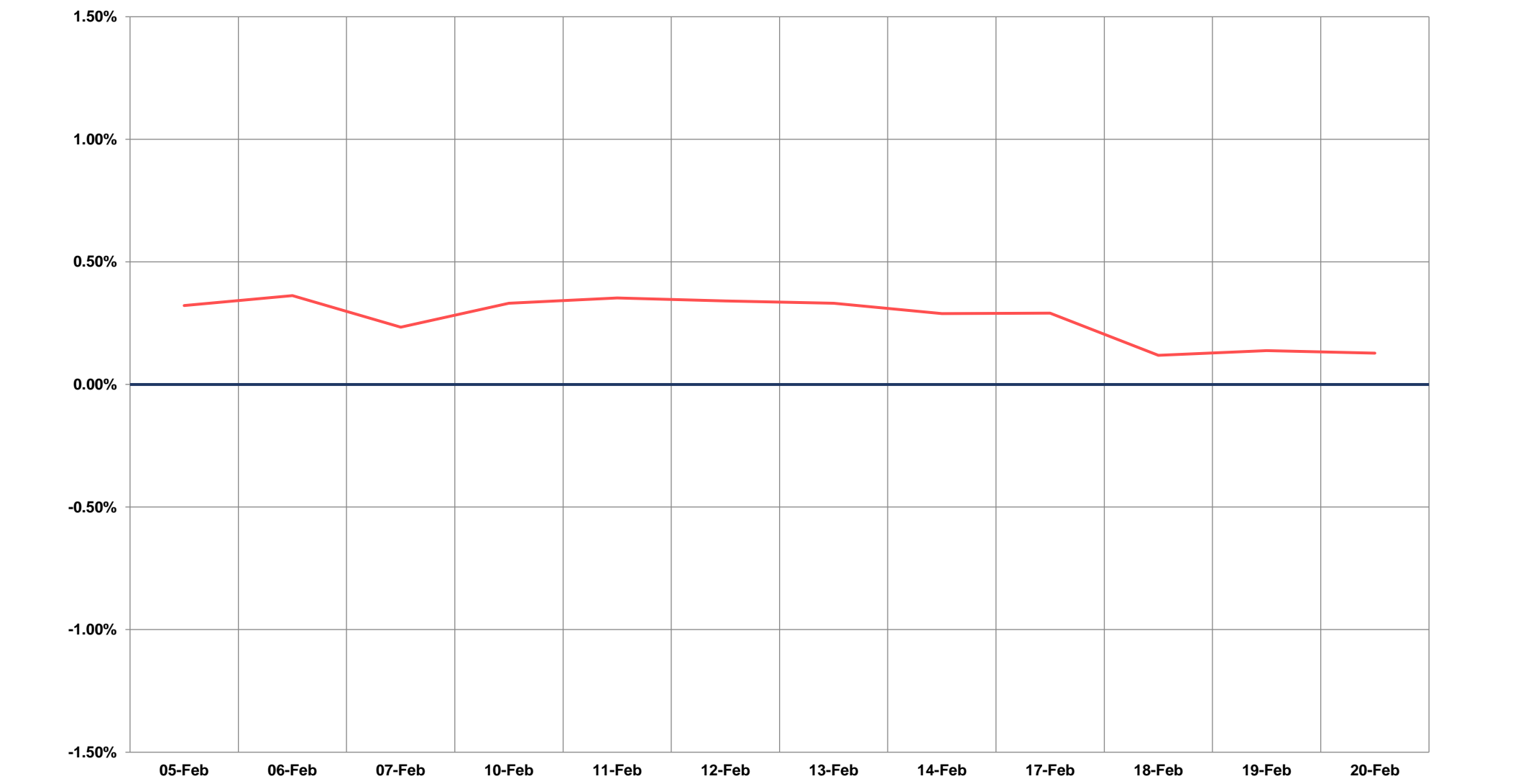
TECHNICAL VIEWS



NIFTY FUTURES



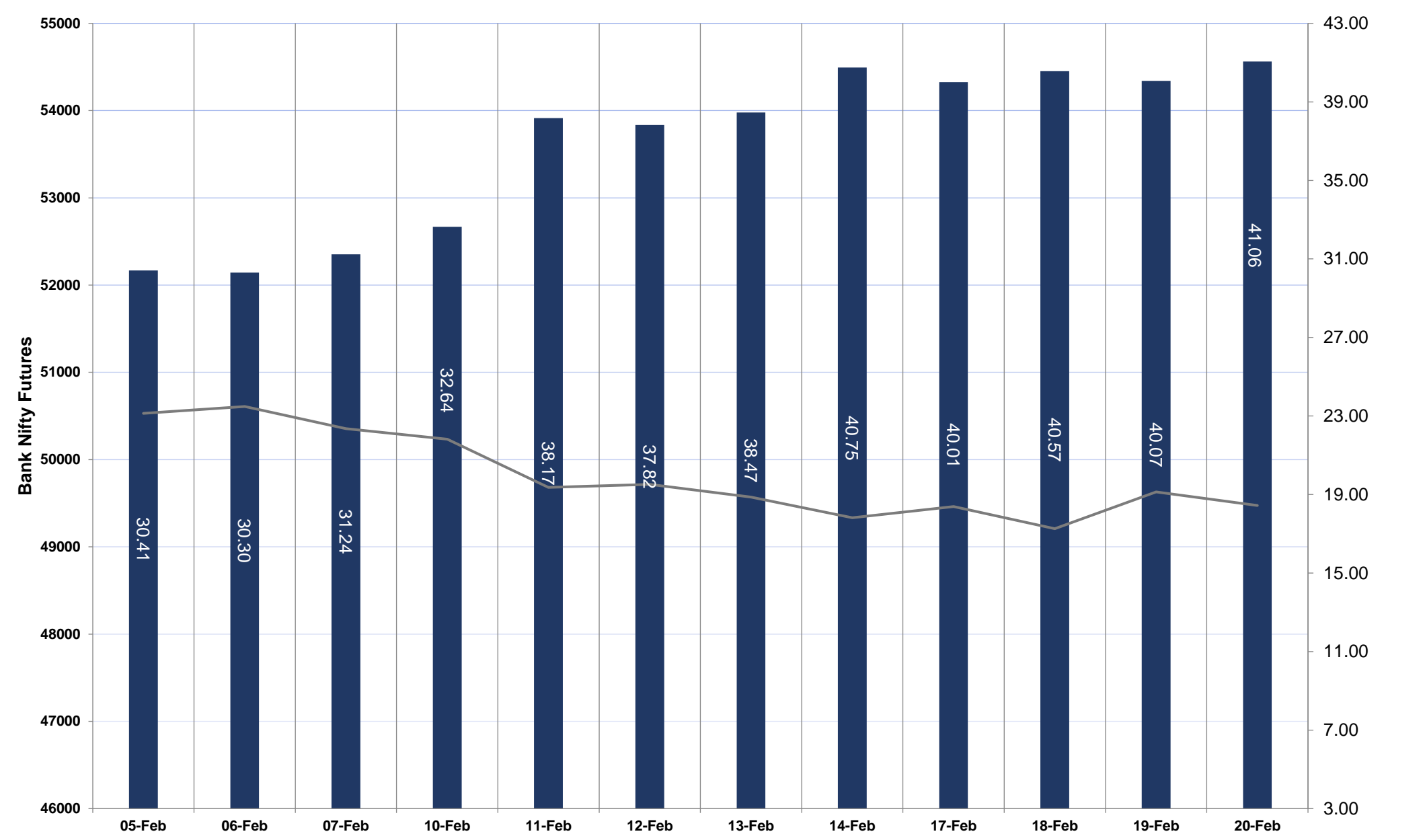
SPREAD: FUTURE & SPOT



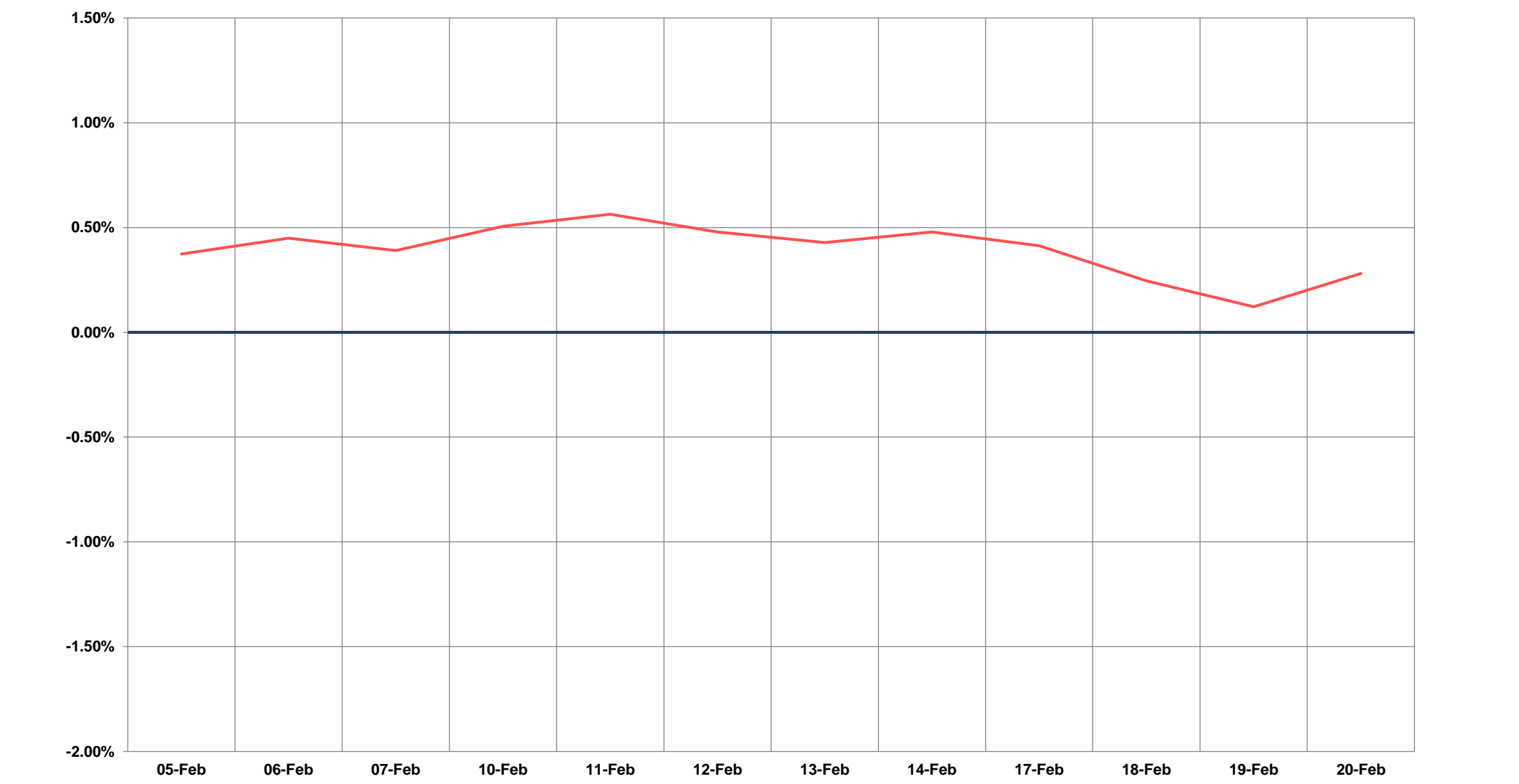
TECHNICAL VIEWS



BANK NIFTY FUTURES



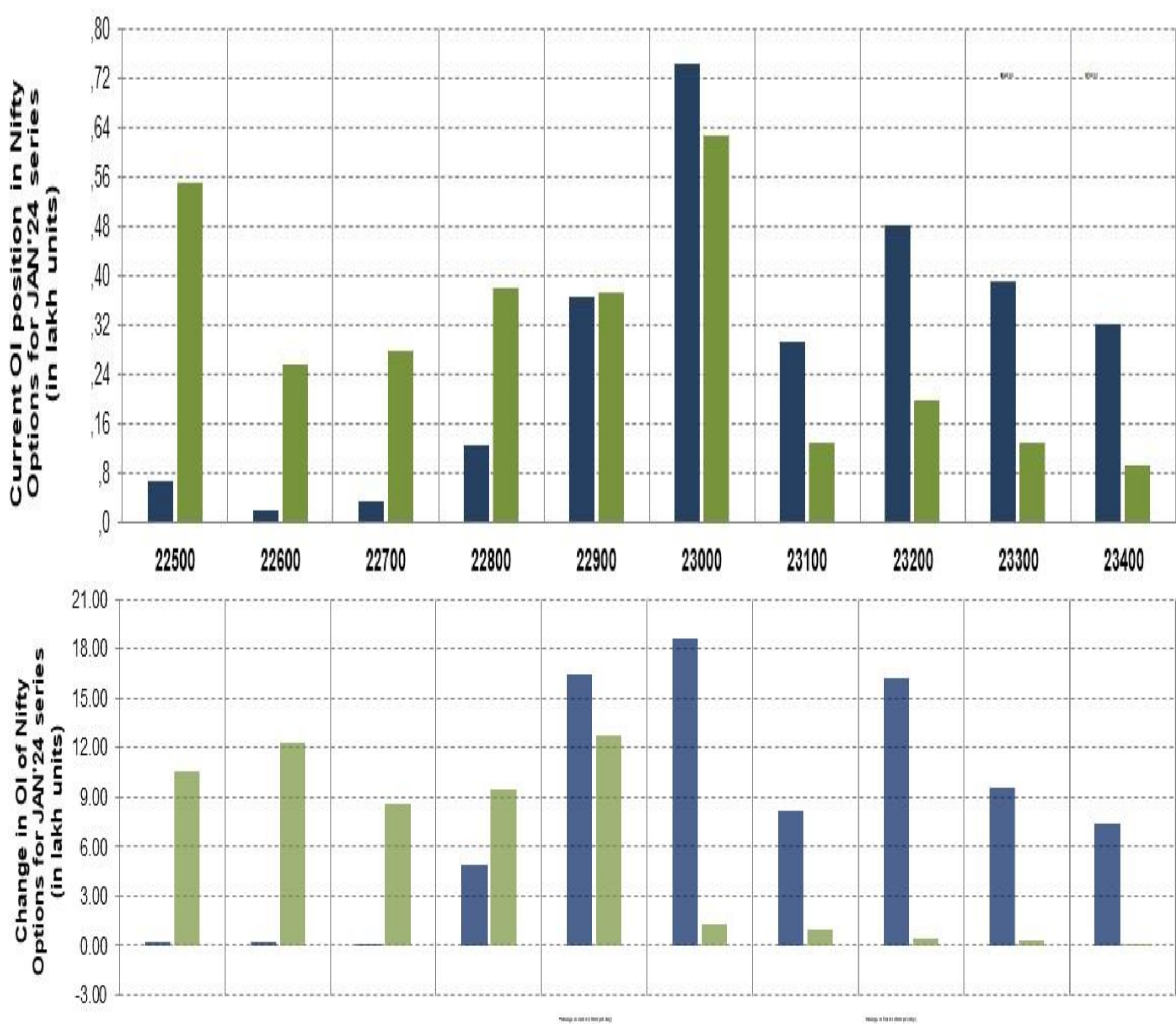
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 1.86 million in Open Interests is **Strike Price of 23000**
- **Most Active Nifty Put** with an addition of 1.27 millions in Open Interests is **Strike Price of 22900**
- **Maximum Open Interest an outstanding** was 7.40 millions for Calls at **Strike Price of 23000**
- **Maximum Open Interest an outstanding** was 6.26 millions for puts at **Strike Price of 23000**

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