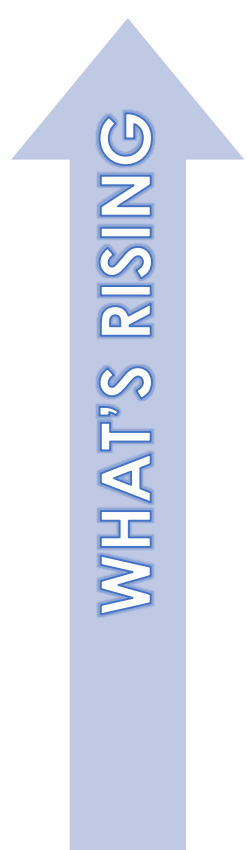


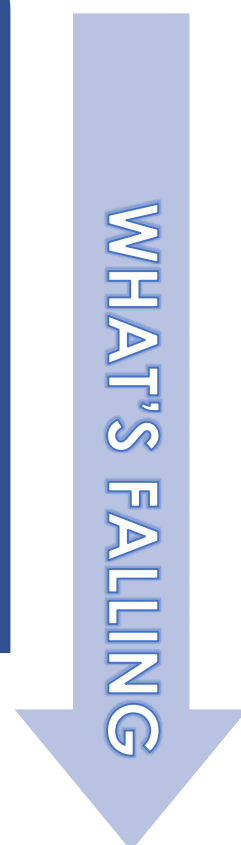


MORNING MANTRA



BULLS

BEARS



Daily Derivatives & Market Report

MAR 04, 2025



Indian equity markets continued their downward trend, while Nifty ended below 22,100 points, pressured by losses in heavyweight and IT stocks. Indices made a negative start, amid persistent FII selling, continuing uncertainty around tariffs and ongoing geopolitical tensions between Russia and Ukraine. In afternoon session, indices came off from day's low point as investors preferred to buy stocks at reduced levels, but remained lower till end of the day.

Some of the important factors in today's trade:

FIIs continue to sell Indian stocks: Traders were worried with the exchange data showing that Foreign Institutional Investors (FIIs) offloaded equities worth Rs 4,788.29 crore on Monday.

Trump confirms tariffs on Canada, Mexico, China: U.S. President Donald Trump confirmed the 25% tariffs on Canada and Mexico as well as the additional 10 percent tariff on China. The reciprocal tariffs on other U.S. trade partners will be imposed on April 2.

FDI in India drops 5.6% in Q3 amid global uncertainties: Traders were concerned as Department for Promotion of Industry and Internal Trade (DPIIT) data showed that the foreign direct investment in India dipped by 5.6 per cent year-on-year to \$10.9 billion in October-December quarter of this fiscal due to global economic uncertainties.

Global front: European markets were trading in red, after U.S. President Donald Trump paused all military aid for Ukraine to ensure that it will contribute to a solution. Trump also confirmed tariffs on Mexico, Canada and China, stirring concerns about inflation and a possible global recession. Most of the Asian markets ended in red, as Japan's consumer sentiment decreased unexpectedly in February to the lowest level in almost two years. The survey data from the Cabinet Office showed that the seasonally adjusted consumer confidence index weakened to 35.0 in February from 35.2 in January.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	72989.93	-96.01	-0.13
NIFTY	22082.65	-36.65	-0.17
MIDCAP	38721.96	31.94	0.08
SMLCAP	43325.88	546.17	1.28
BSEFMC	18317.32	-73.99	-0.40
HEALTHCARE	38579.52	231.57	0.60
AUTO	45498.33	-519.92	-1.13
POWER	5888.93	37.93	0.65
REALTY	6262.09	3.27	0.05
BSE IT	36628.71	-283.88	-0.77
BANKEX	54979.36	280.42	0.51
OIL GAS	22706.43	246.04	1.10
METAL	28329.67	103.54	0.37
INDIA VIX	13.83	0.07	0.51

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1853	1146	38
BSE	2216	1744	126

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	4221	6007	(30)
NSE CASH	87889	94975	(7)
NSE F&O	125525	160472	(22)

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	19.63	3..29	1.45
SENSEX	24.96	3.73	1.12

KEY NUMBERS TRACKER



FII – DII ACTIVITY IN CASH SEGMENT (₹ in Crs)			
FII-DII*	Buy	Sell	Net
DII	13542	8691	4851
FII	12023	15428	(3406)

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)			
FII	Buy	Sell	Net
Index Futures	3044.36	3081.31	(37)
Index Options	672147.23	646098.33	26049
Stock Futures	17658.30	14895.05	2763
Stock Options	43707.57	44552.10	(845)

PUT-CALL RATIO		
Index	Current	Previous
NIFTY	0.86	0.81
BANK NIFTY	0.99	0.91

DOLLAR INDEX			
Dollar Index	Current	Previous	% Change
DXY	106.26	106.55	-0.27

10-YEARS G-SEC YIELD			
Country	Current	Previous	% Change
INDIA	6.741	6.737	0.06
USA	4.167	4..178	-0.26

KEY COMMODITIES TRACKER (in \$)			
Commodity	Current	Change Points	% Change
Gold	2916.36	25.82	0.89
Silver	31.86	0.22	0.71
Crude-Oil	67.55	-0.82	-1.20
Brent-Crude	70.59	-1.03	-1.44

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES				
Expiry		Close	Change Points	% Change
26 MAR-25	USD-INR	87.43	-0.03	-0.04
26 MAR-25	EUR-INR	91.99	0.54	0.59
26 MAR-25	GBP-INR	111.07	0.48	0.43
26 MAR-25	JPY- INR	58.90	0.39	0.67

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS						
Index	Close	S2	S1	Pivot	R1	R2
NIFTY	22083	21910	21996	22051	22137	22191
SENSEX	72990	72486	72738	72886	73138	73285
NIFTY FUTURES	22191	22040	22116	22176	22252	22312
BANK NIFTY	48245	47731	47988	48182	48438	48632
CNX IT	37277	36464	36871	37204	37610	37944
CNX MIDCAP	48008	46564	47286	47779	48501	48994
CNX SMALLCAP	14763	14196	14479	14673	14957	15151
INDIA VIX	13.83	12.97	13.40	13.80	14.23	14.63

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	SELL	NEUTRAL	SELL

SECURITIES BAN IN F&O TRADES FOR 05-03-2025
MANAPPURAM

TECHNICAL VIEWS



NIFTY

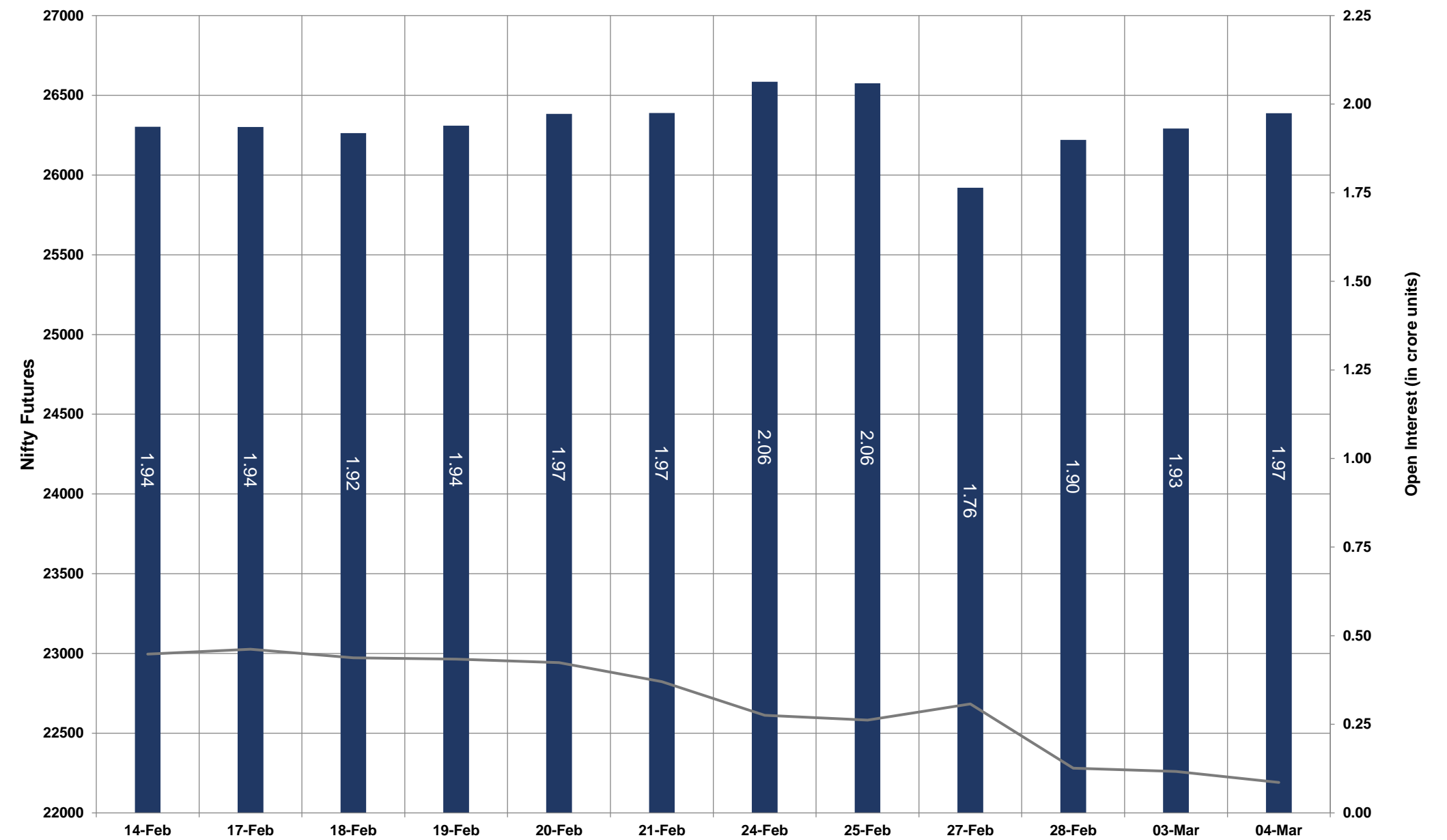


- Nifty Cash = **22082.65 (-0.17%)**
- Resistance levels = **22270** and **22450**
- Support levels = **21950** and **21820**

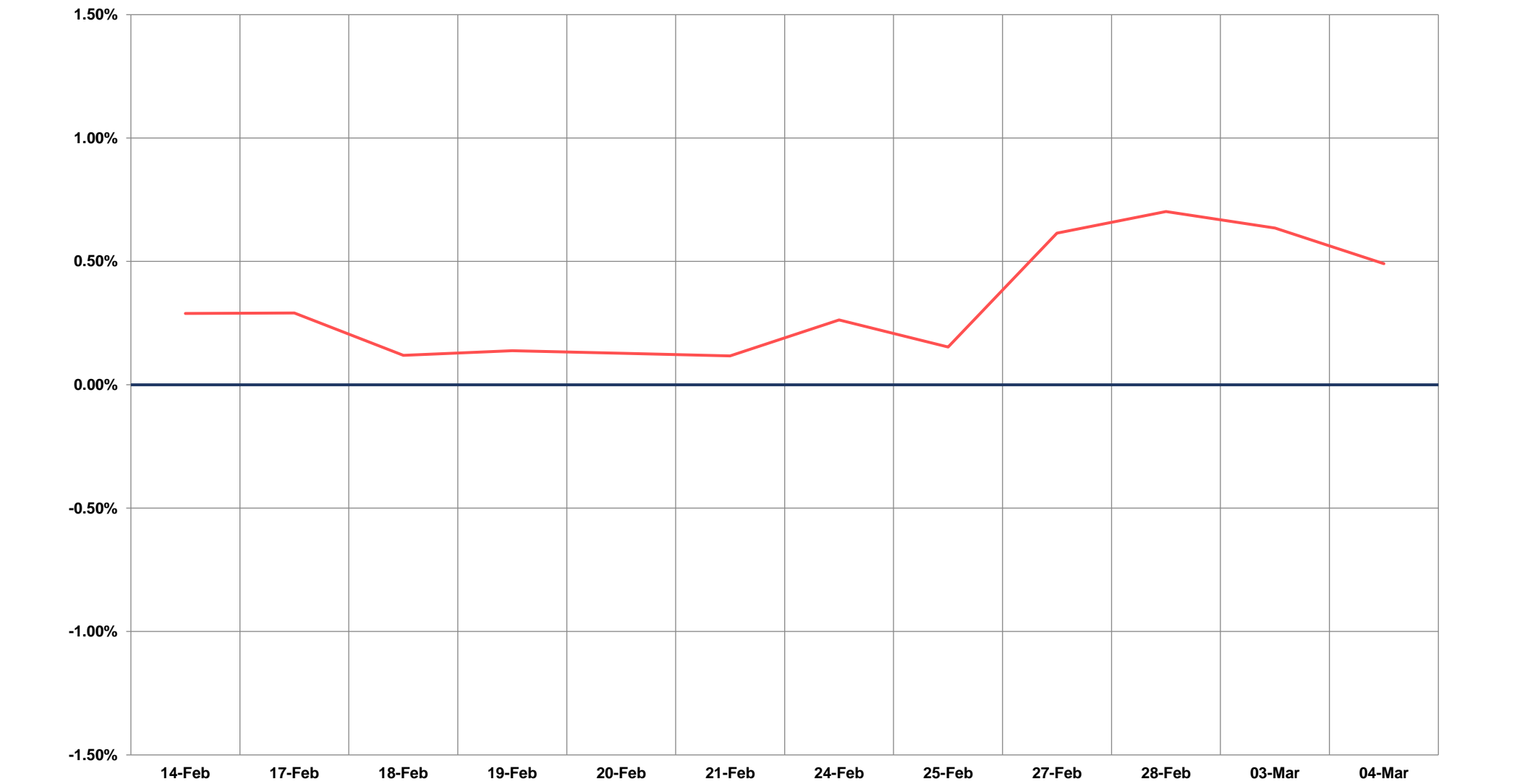
TECHNICAL VIEWS



NIFTY FUTURES



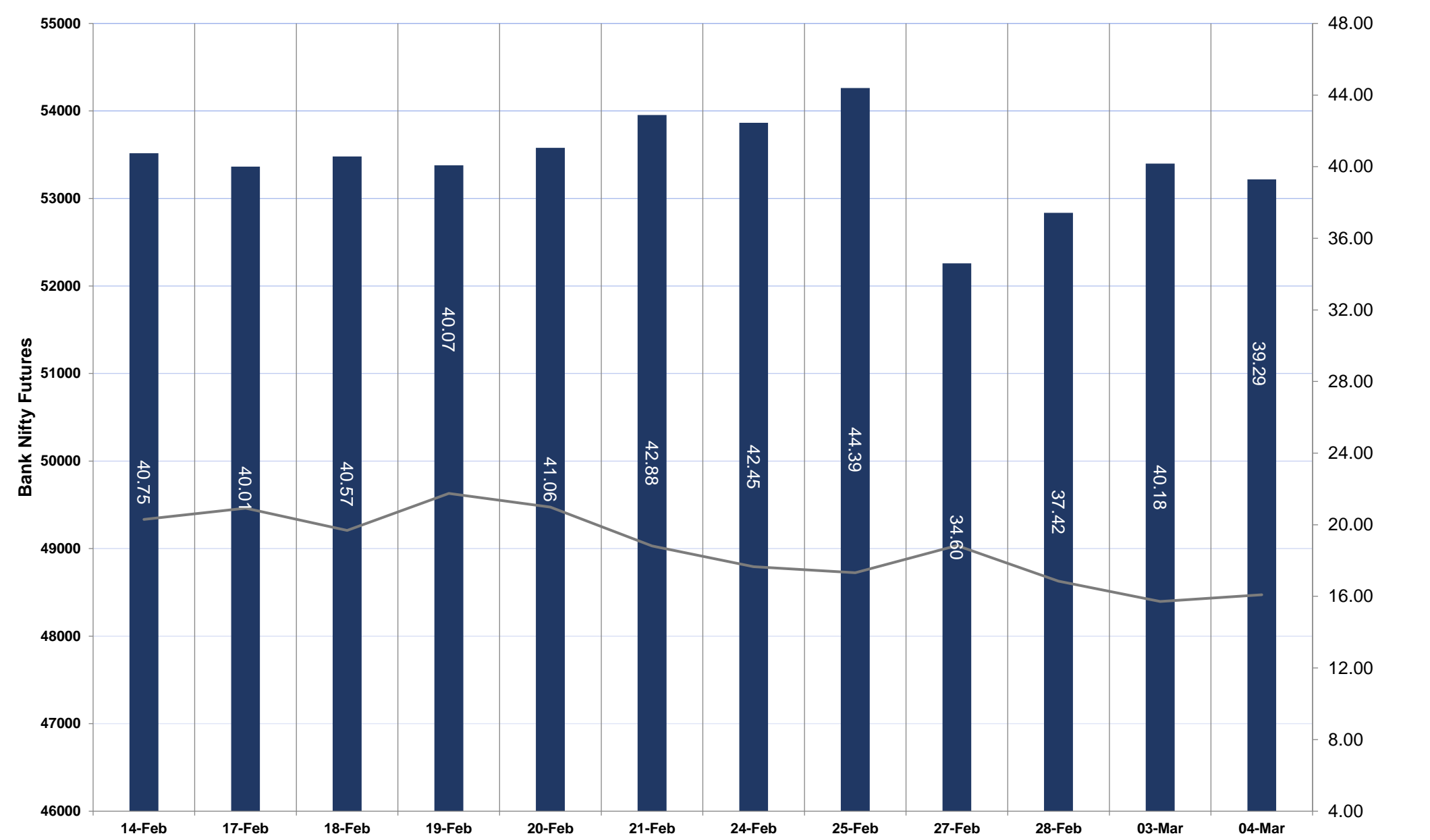
SPREAD: FUTURE & SPOT



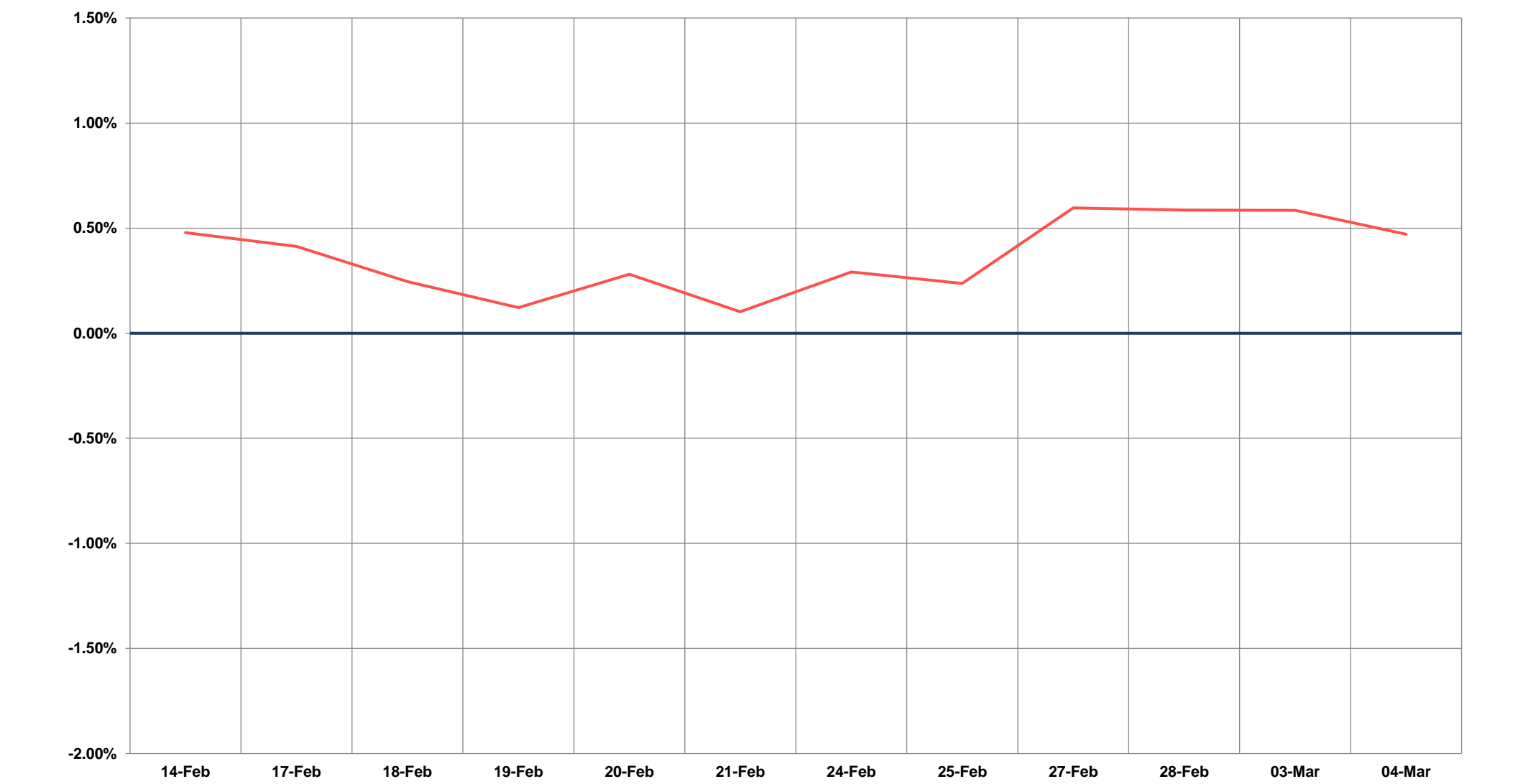
TECHNICAL VIEWS



BANK NIFTY FUTURES



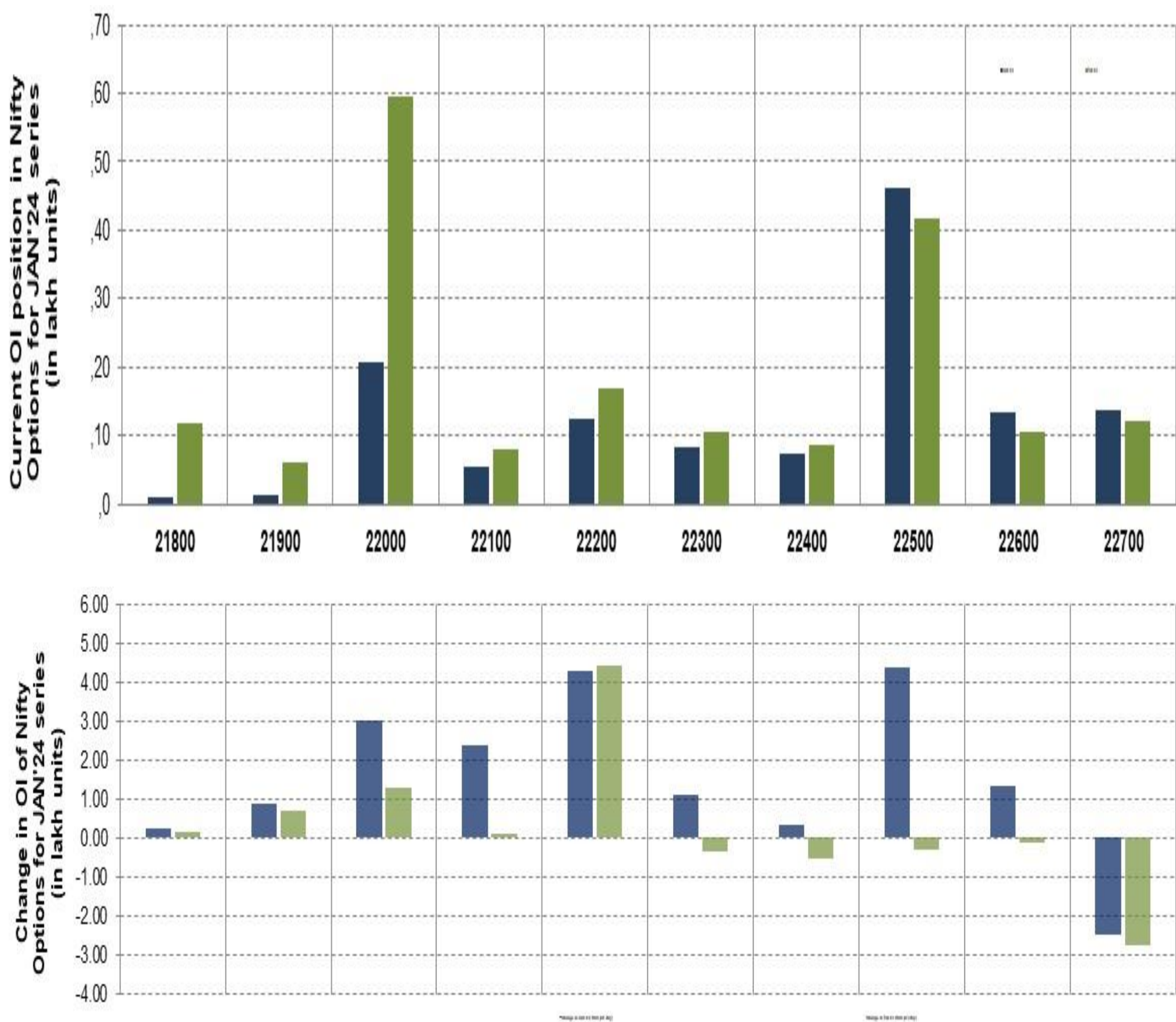
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.44 million in Open Interests is **Strike Price of 22500**
- **Most Active Nifty Put** with an addition of 0.44 millions in Open Interests is **Strike Price of 22200**
- **Maximum Open Interest an outstanding** was 4.61 millions for Calls at **Strike Price of 22500**
- **Maximum Open Interest an outstanding** was 5.96 millions for puts at **Strike Price of 22000**

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