



MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

MAR 05, 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	73730.23	740.30	1.01
NIFTY	22337.30	254.65	1.15
MIDCAP	39751.73	1029.77	2.66
SMLCAP	44538.20	1212.32	2.80
BSEFMC	18630.24	312.92	1.71
HEALTHCARE	39245.58	666.06	1.73
AUTO	46614.88	1116.55	2.45
POWER	6105.24	216.31	3.67
REALTY	6407.34	145.25	2.32
BSE IT	37382.97	754.26	2.06
BANKEX	55401.53	422.17	0.77
OIL GAS	23265.37	558.94	2.46
METAL	29328.15	998.48	3.52
INDIA VIX	13.67	-0.16	-1.16

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	2671	345	25
BSE	3242	770	89

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	7211	4221	71
NSE CASH	96035	87889	9
NSE F&O	167315	125525	33

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	19.86	3.33	1.44
SENSEX	20.53	3.79	1.24

KEY NUMBERS TRACKER



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

FII-DII*	Buy	Sell	Net
DII	15068	11698	3371
FII	12046	14941	(2895)

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	3634.31	3223.74	411
Index Options	1096917.46	1095623.04	1294
Stock Futures	21092.76	20250.01	843
Stock Options	56888.59	57544.85	(656)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.05	0.86
BANK NIFTY	1.02	0.99

DOLLAR INDEX

Dollar Index	Current	Previous	% Change
DXY	104.94	105.53	-0.56

10-YEARS G-SEC YIELD

Country	Current	Previous	% Change
INDIA	6.709	6.741	-0.47
USA	4.246	4.210	0.86

KEY COMMODITIES TRACKER (in \$)

Commodity	Current	Change Points	% Change
Gold	2916.90	2.58	0.09
Silver	32.31	0.40	1.26
Crude-Oil	67.39	-0.79	-1.16
Brent-Crude	70.55	-0.49	-0.69

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES				
Expiry		Close	Change Points	% Change
26 MAR-25	USD-INR	87.21	-0.21	-0.24
26 MAR-25	EUR-INR	93.15	1.17	1.27
26 MAR-25	GBP-INR	111.78	0.67	0.60
26 MAR-25	JPY- INR	58.56	-0.33	-0.56

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS						
Index	Close	S2	S1	Pivot	R1	R2
NIFTY	22337	21940	22138	22267	22466	22594
SENSEX	73730	72480	73105	73519	74145	74559
NIFTY FUTURES	22441	22040	22240	22369	22570	22699
BANK NIFTY	48490	47979	48234	48446	48702	48913
CNX IT	38072	36819	37446	37914	38540	39008
CNX MIDCAP	49168	47420	48294	48749	49623	50078
CNX SMALLCAP	15199	14611	14905	15059	15352	15506
INDIA VIX	13.67	12.60	13.14	13.63	14.17	14.66

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

SECURITIES BAN IN F&O TRADES FOR 06-03-2025	
MANAPPURAM	

TECHNICAL VIEWS



NIFTY

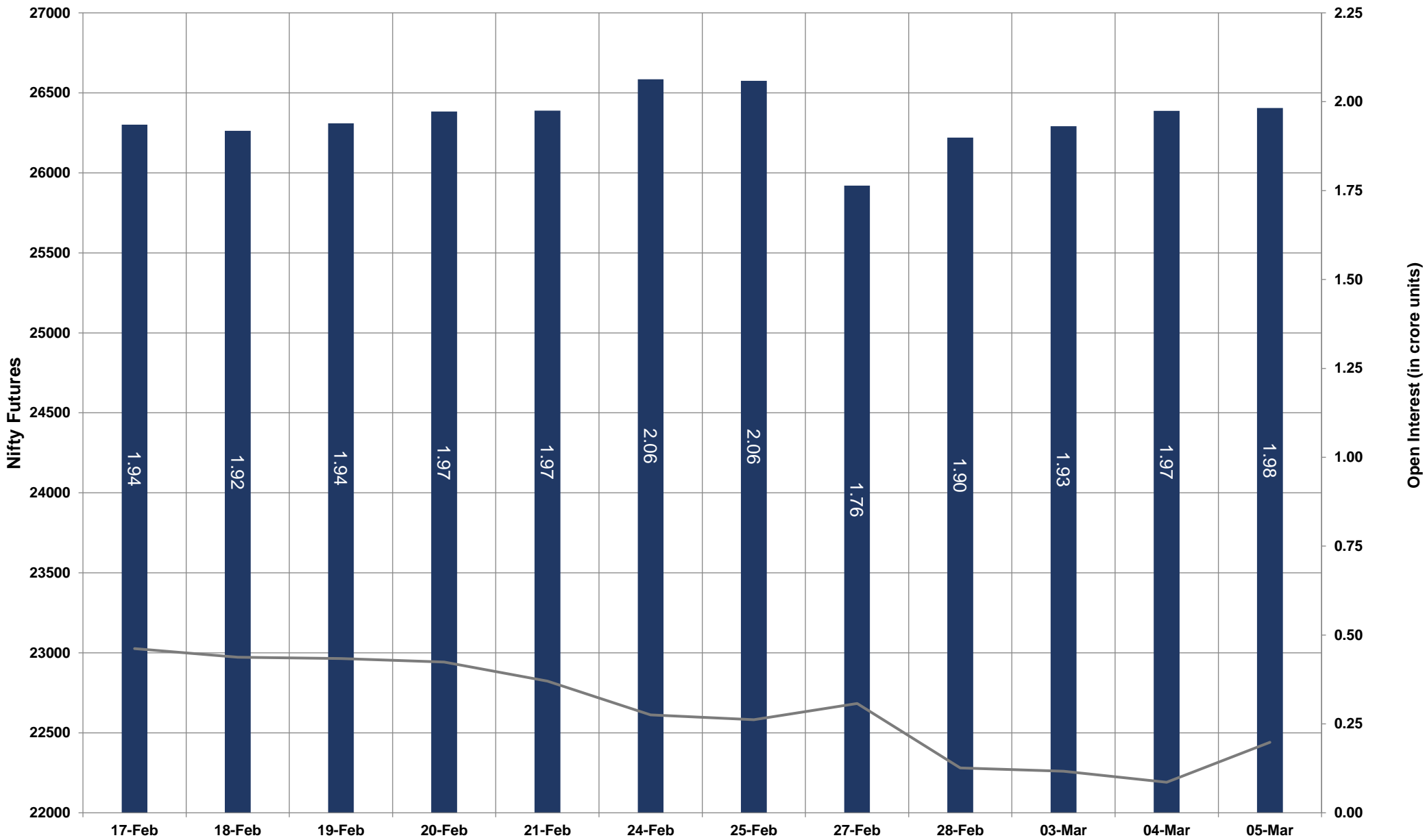


- Nifty Cash = **22082.65 (-0.17%)**
- Resistance levels = **22270** and **22450**
- Support levels = **21950** and **21820**

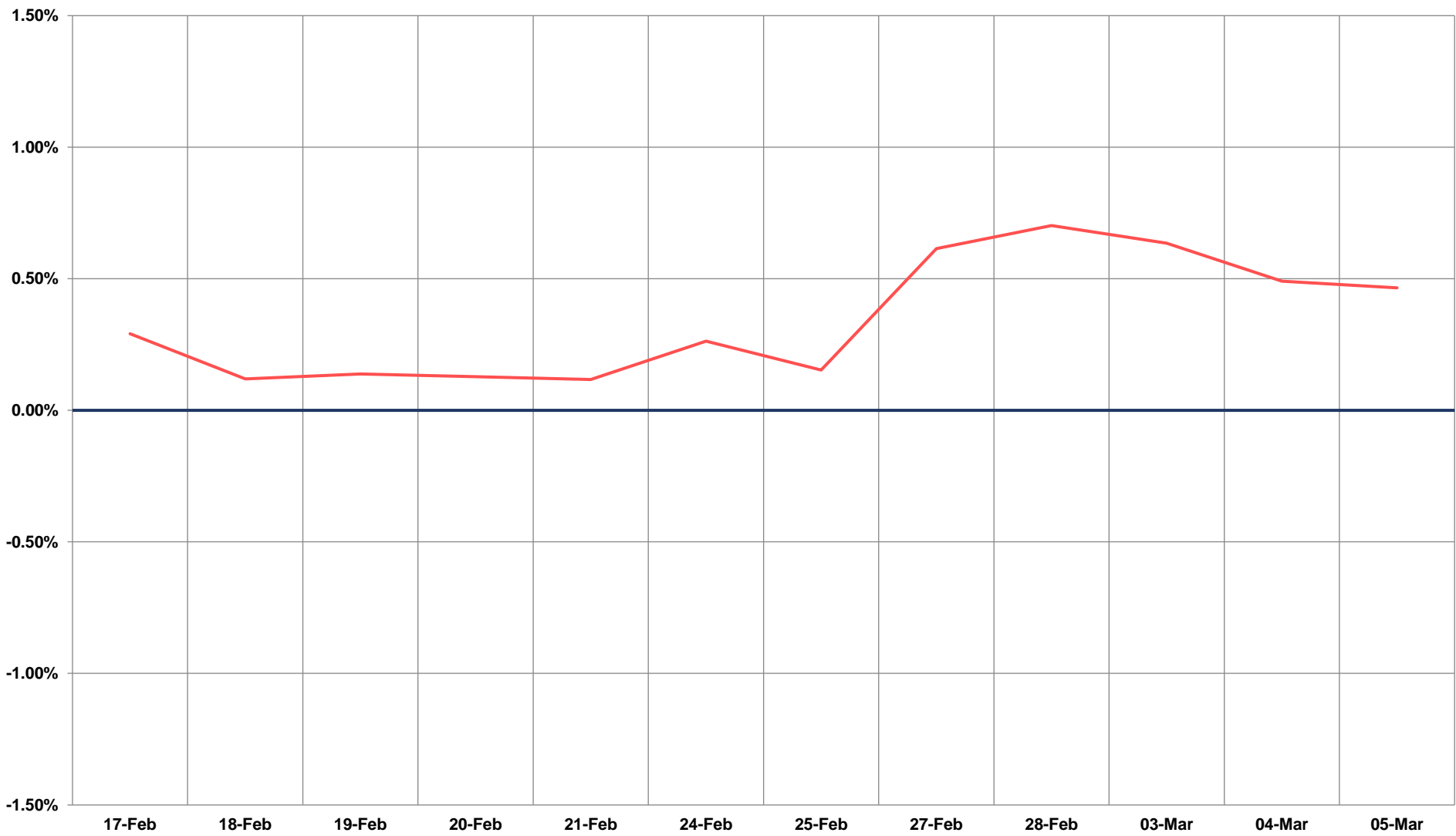
TECHNICAL VIEWS



NIFTY FUTURES



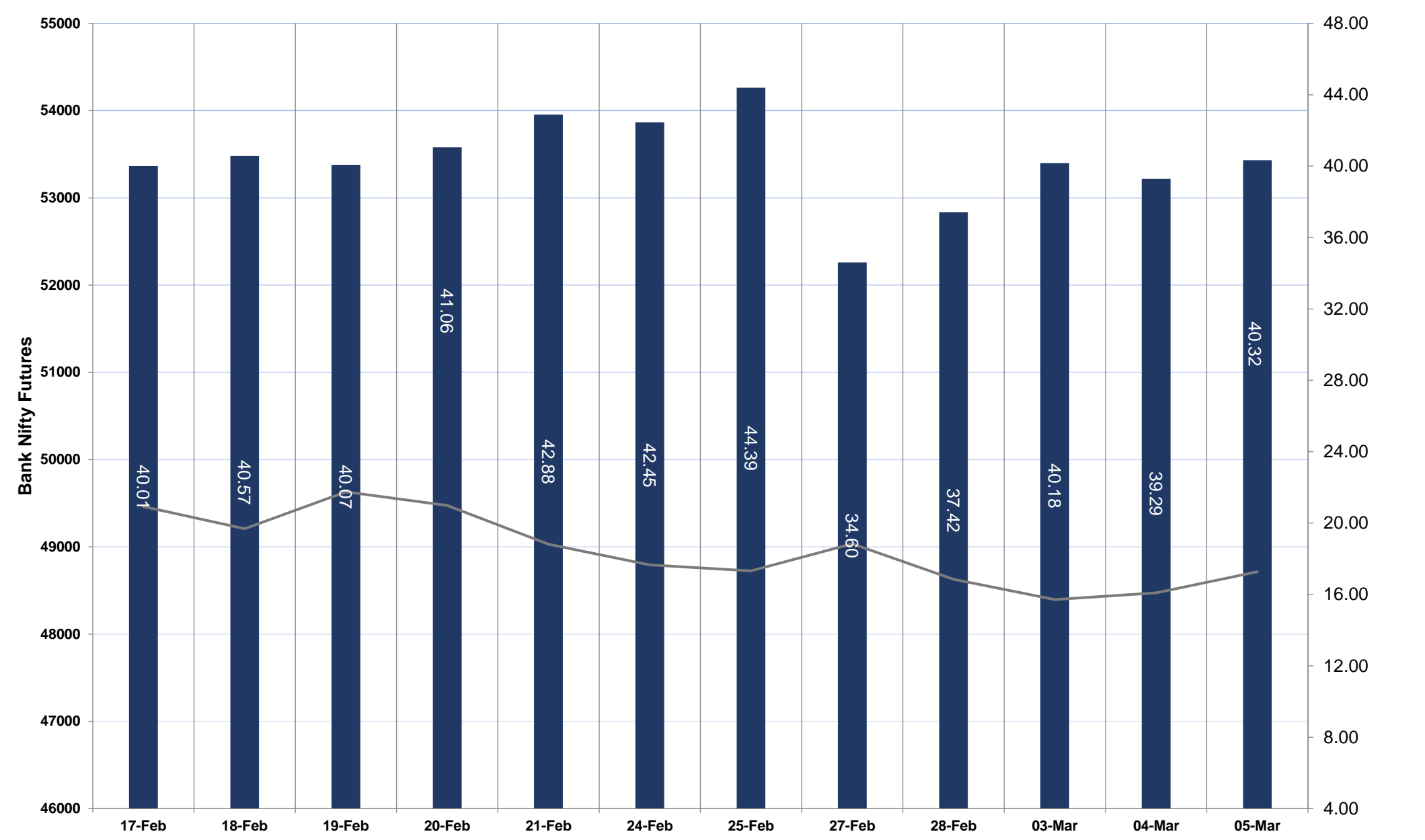
SPREAD: FUTURE & SPOT



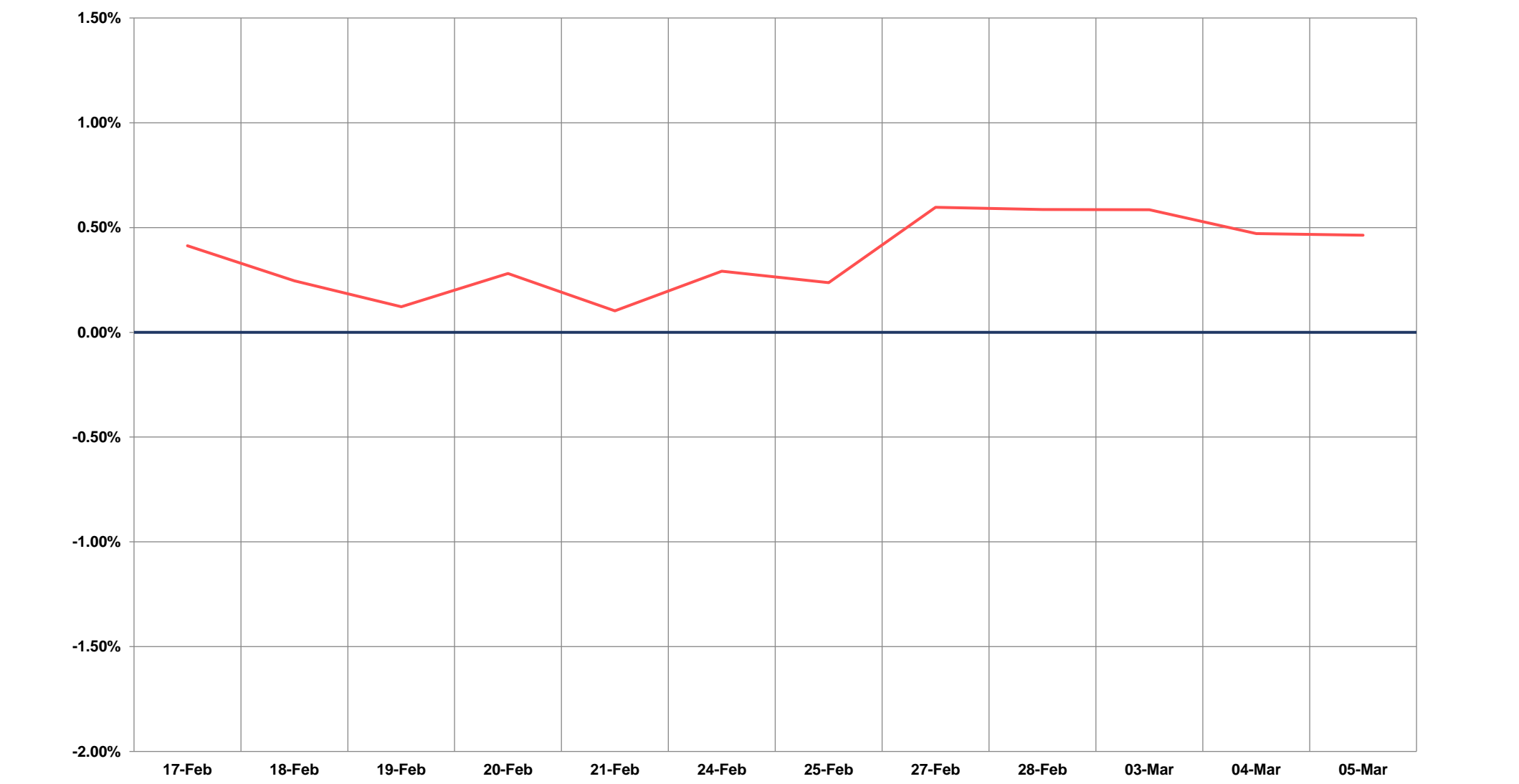
TECHNICAL VIEWS



BANK NIFTY FUTURES



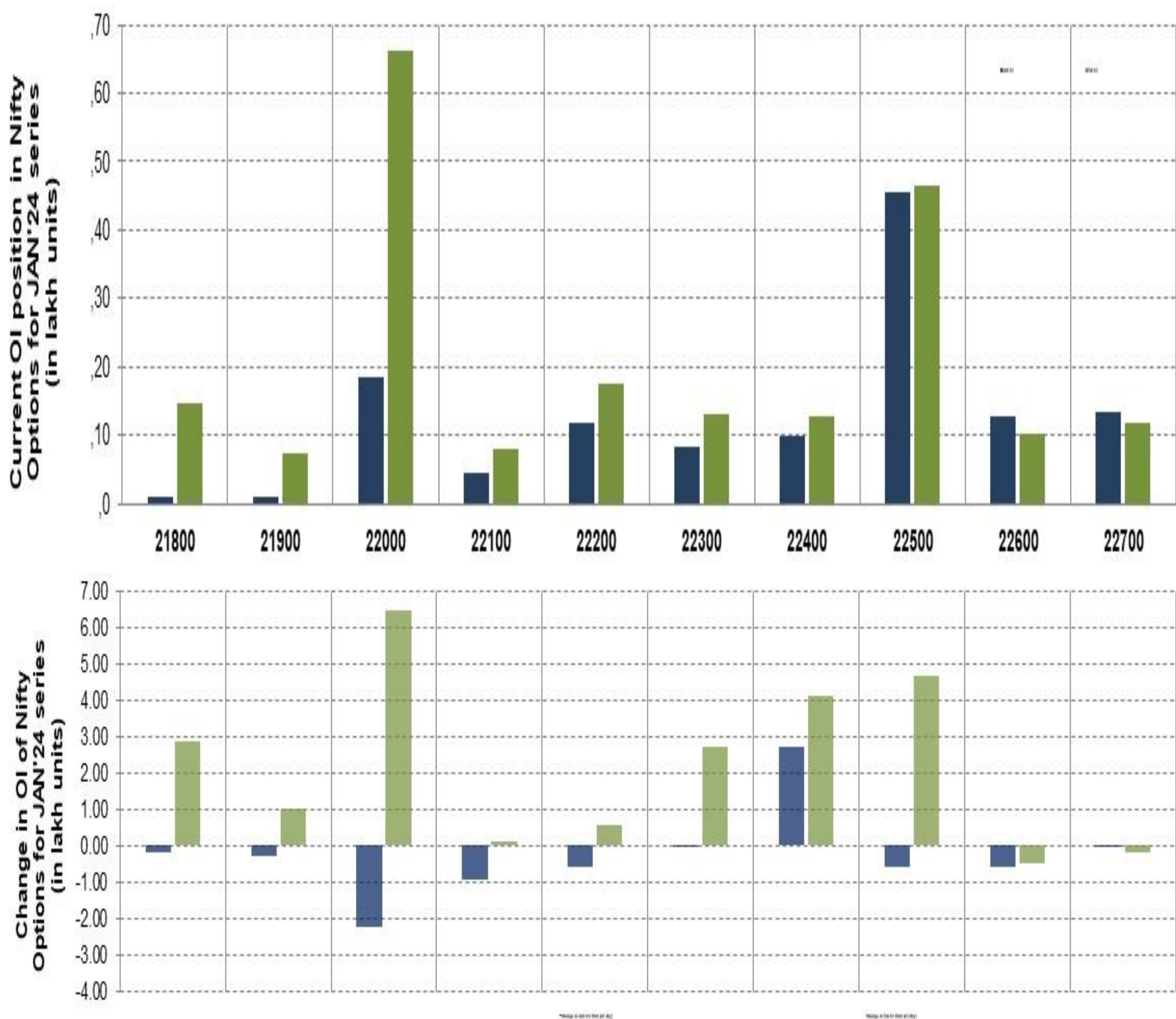
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.27 million in Open Interests is **Strike Price of 22400**
- **Most Active Nifty Put** with an addition of 0.64 millions in Open Interests is **Strike Price of 22000**
- **Maximum Open Interest an outstanding** was 4.55 millions for Calls at **Strike Price of 22500**
- **Maximum Open Interest an outstanding** was 6.61 millions for puts at **Strike Price of 22000**

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