



MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

MAR 06, 2025



Indian stock markets ended near their day's high points on Thursday, with the Nifty advancing over 200 points, supported by delay in U.S. tariffs and a decline in crude oil prices. After making positive start, soon markets turned choppy and were oscillating between red and green terrain amid foreign fund outflows. In afternoon session, indices traded in green and extended their gains to end higher, as traders took some support with RBI's commitment to inject Rs 1.9 lakh crore liquidity into banking system.

Some of the important factors in today's trade:

U.S. tariff delay boost sentiment: Traders reacted positively to news of a one-month delay in certain U.S. tariffs on Mexico and Canada imports. The White House indicated that Trump is open to further tariff concessions, easing concerns about potential economic fallout.

PM Modi says budget 2025-26 to strengthen workforce, economy: Sentiments were upbeat with Prime Minister Narendra Modi's statement that the Union Budget 2025-26 paves the way for a strong workforce and a growing economy with investments prioritized equally across infrastructure, industries, people, economy, and innovation.

Engineering goods exports to US surge 18% in Jan: Traders took note of report that EEPC India's engineering goods exports to the United States recorded an 18 per cent year-on-year growth in January 2025, reaching \$1.62 billion, even as overall engineering shipments grew at a modest 7.44 per cent.

Global front: Most of European markets were trading in red, ahead to the European Central Bank's interest-rate decision and President Christine Lagarde's press conference later in the day for direction. Most of the Asian markets ended in green, after U.S. President Donald exempted automakers from newly imposed tariffs on Mexico and Canada for one month, raising hopes for negotiations.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	74340.10	609.88	0.83
NIFTY	22544.70	207.40	0.93
MIDCAP	40009.30	257.57	0.65
SMLCAP	45265.29	727.09	1.63
BSEFMC	18844.25	214.01	1.15
HEALTHCARE	39701.72	456.14	1.16
AUTO	46971.19	356.31	0.76
POWER	6188.83	83.59	1.37
REALTY	6380.57	-26.77	-0.42
BSE IT	37507.41	124.44	0.33
BANKEX	55544.71	143.18	0.26
OIL GAS	23815.47	550.10	2.36
METAL	30102.69	774.54	2.64
INDIA VIX	13.73	0.06	0.44

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	2442	591	33
BSE	2987	1009	107

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	5005	7211	(31)
NSE CASH	94933	96035	(1)
NSE F&O	180468	167315	8

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	20.04	3.36	1.42
SENSEX	20.70	3.82	1.23

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	5934.83	4190.98	1744
Index Options	2914739.27	2933133.72	(18394)
Stock Futures	21451.57	19775.07	1677
Stock Options	54673.60	54989.07	(315)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.11	1.05
BANK NIFTY	1.02	1.02

DOLLAR INDEX

Dollar Index	Current	Previous	% Change
DXY	104.12	104.27	-0.14

10-YEARS G-SEC YIELD

Country	Current	Previous	% Change
INDIA	6.681	6.718	-0.55
USA	4.305	4.267	0.87

KEY COMMODITIES TRACKER (in \$)

Commodity	Current	Change Points	% Change
Gold	2892.93	-25.12	-0.86
Silver	32.29	-0.32	-0.96
Crude-Oil	66.56	0.25	0.38
Brent-Crude	69.53	0.23	0.33

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	22545	22138	22342	22449	22652	22760
SENSEX	74340	73074	73707	74049	74682	75024
NIFTY FUTURES	22621	22260	22441	22539	22720	22819
BANK NIFTY	48628	48049	48338	48589	48878	49128
CNX IT	38145	37700	37923	38135	38358	38570
CNX MIDCAP	49348	48911	49130	49471	49689	50031
CNX SMALLCAP	15400	15198	15299	15378	15480	15559
INDIA VIX	13.72	12.83	13.27	13.73	14.17	14.63

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 07-03-2025

MANAPPURAM

TECHNICAL VIEWS



NIFTY

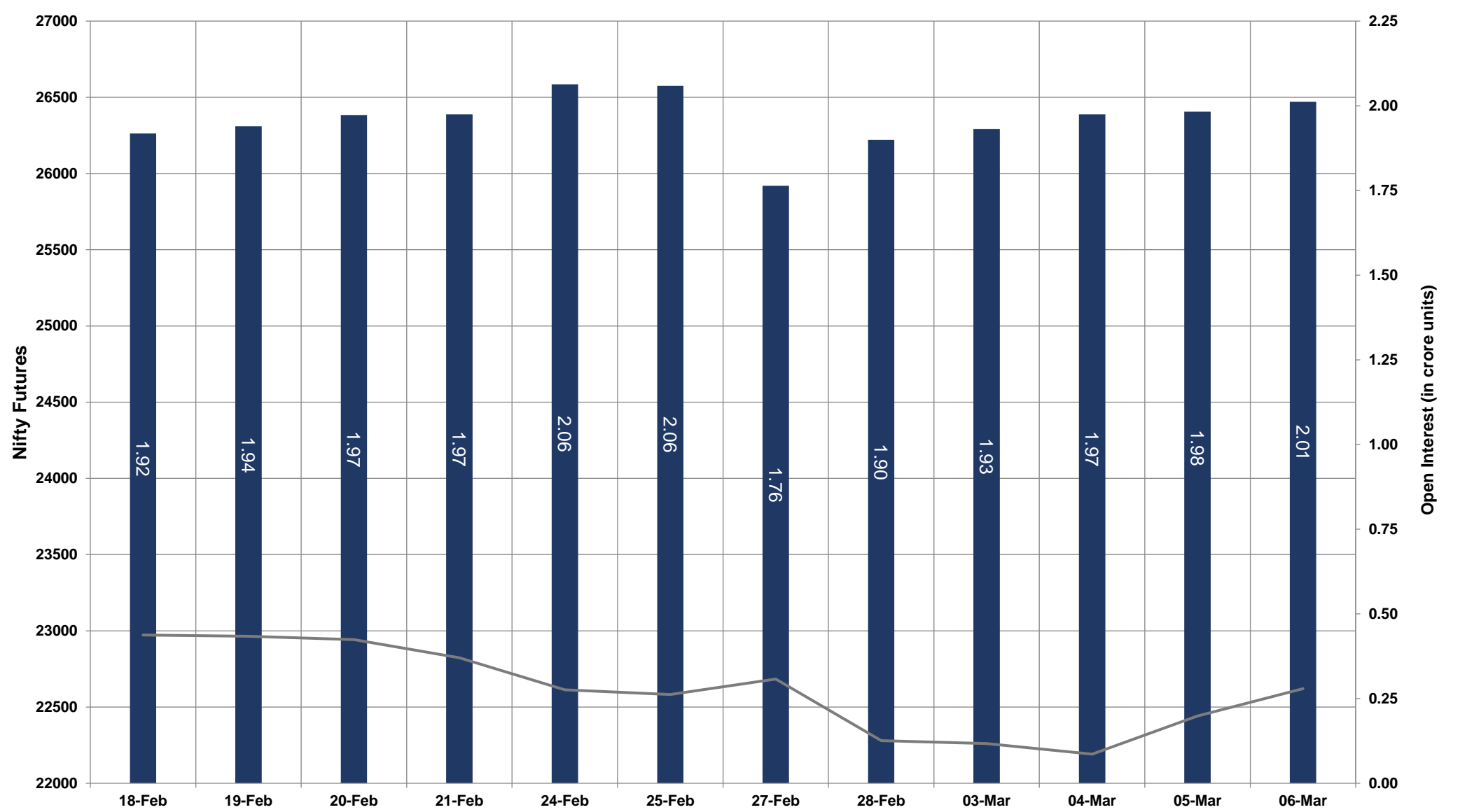


- Nifty Cash = **22544.70 (0.93%)**
- Resistance levels = **22670** and **22750**
- Support levels = **22350** and **22200**

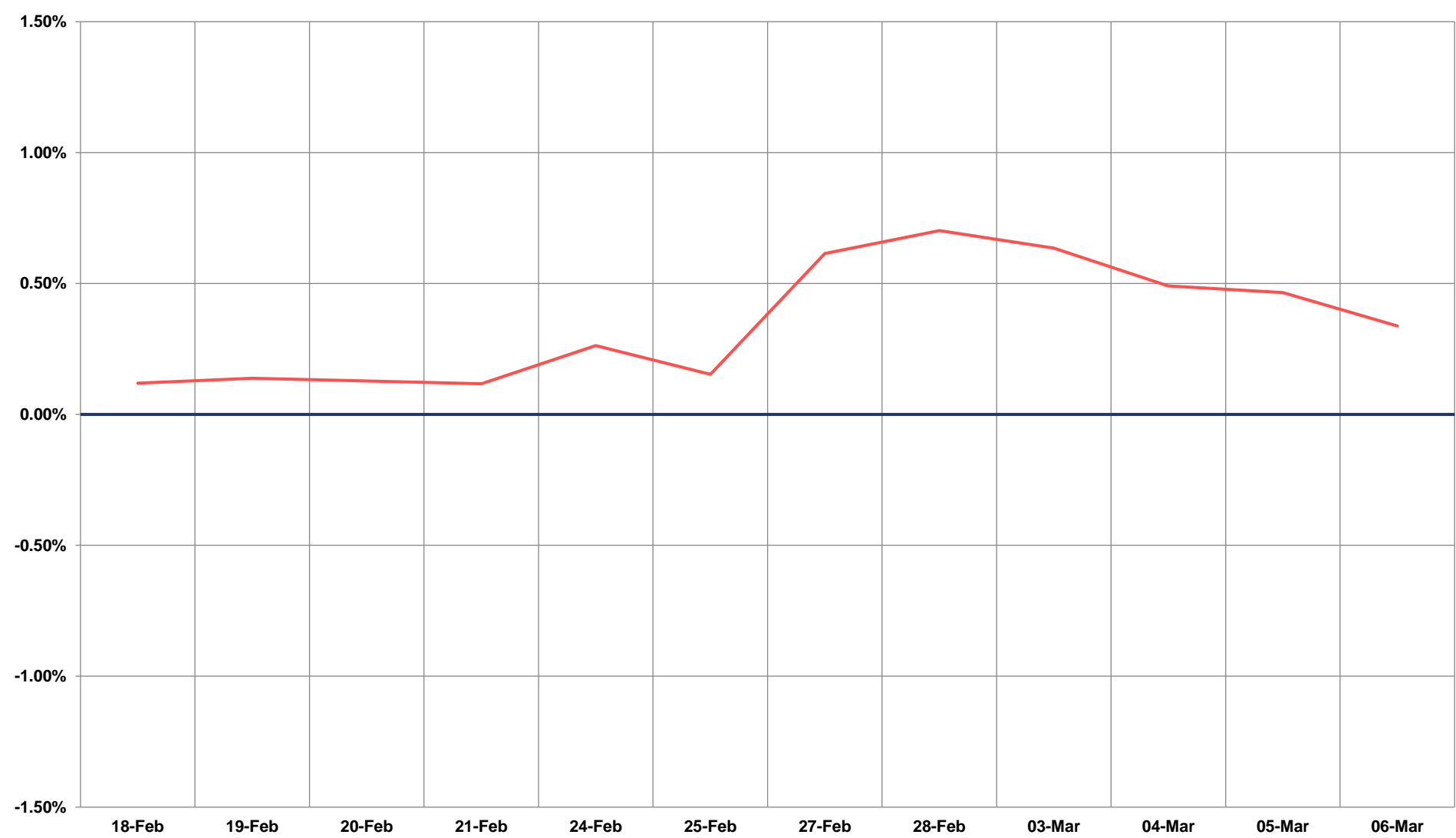
TECHNICAL VIEWS



NIFTY FUTURES



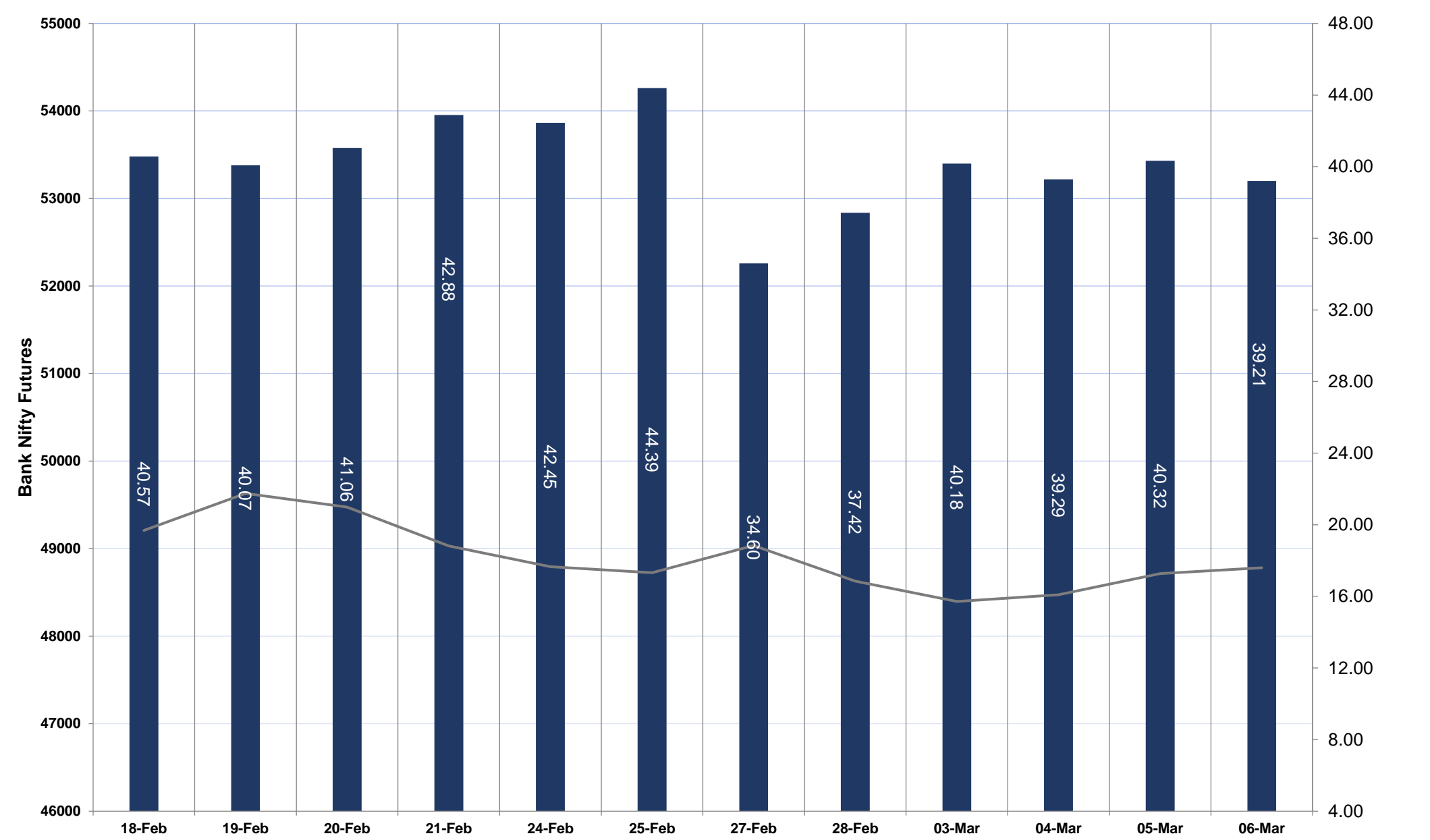
SPREAD: FUTURE & SPOT



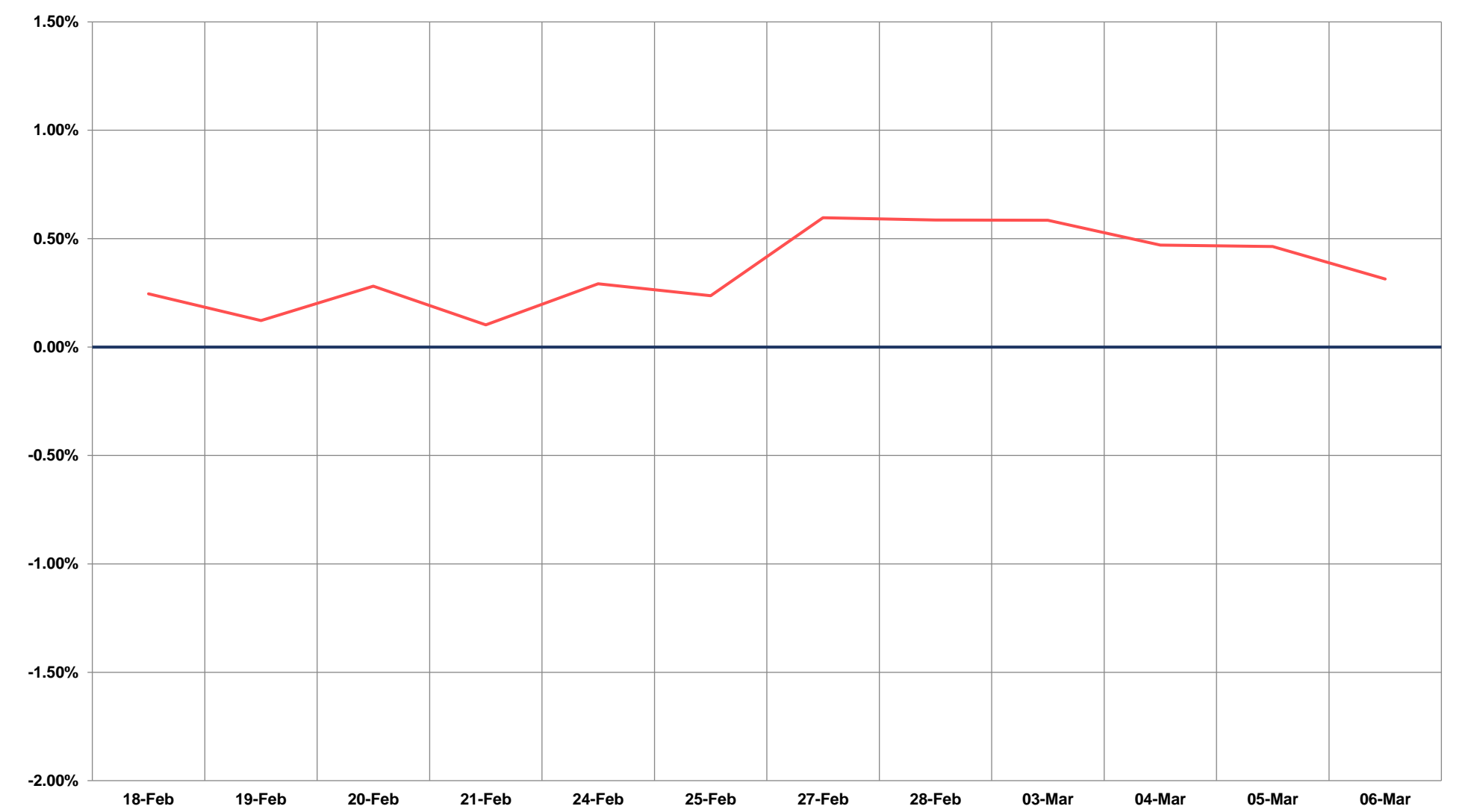
TECHNICAL VIEWS



BANK NIFTY FUTURES



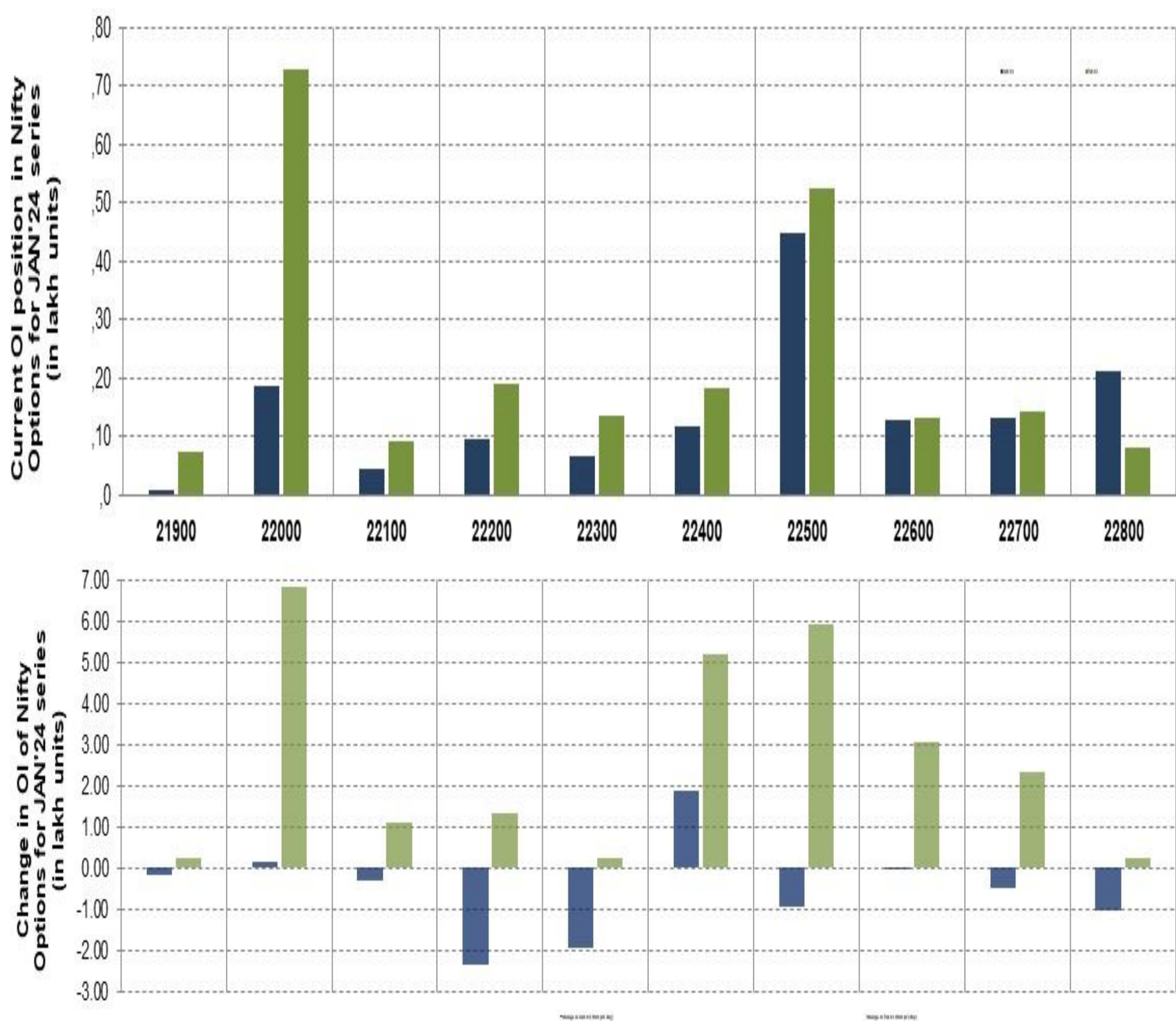
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.18 million in Open Interests is **Strike Price of 22400**
- **Most Active Nifty Put** with an addition of 0.68 millions in Open Interests is **Strike Price of 22000**
- **Maximum Open Interest an outstanding** was 4.46 millions for Calls at **Strike Price of 22500**
- **Maximum Open Interest an outstanding** was 7.29 millions for puts at **Strike Price of 22000**

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