



# MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

MAR 11, 2025



Indian equity benchmarks pared losses and closed flat on Tuesday, as investors awaited crucial key macroeconomic data i.e. Consumer Price Index (CPI) and Index of Industrial Production (IIP), which due on tomorrow. Markets made a negative start, amid concerns about U.S. President Donald Trump's flip-flop tariff policy and its impact on inflation, interest rates and global growth. In the final hour of trading, the indices managed trimmed their losses and settled near the neutral lines.

Some of the important factors in today's trade:

Govt seeks Rs 51,463 crore extra spending in FY25: Traders took some support with report that the government has sought Parliament nod to spend a net additional Rs 51,462.86 crore in the current financial year ending March (FY25), with a large chunk going towards pension and subsidy fertiliser.

Trading remained muted amid FII selling: Some concern came as exchange data showed Foreign institutional investors (FIIs) offloaded equities worth Rs 485.41 crore on a net basis on Monday.

Auto stocks remain in focus: Credit rating agency ICRA in its latest report stated that domestic commercial vehicle (CV) industry's wholesale volumes are expected to grow 3-5 per cent year-on-year in FY26.

Global front: European markets were trading in green, as investors shrug off concerns about trade war for now, and focus on earnings and look ahead to key U.S. inflation data due on Wednesday. Most of the Asian markets ended lower, amid fears that the U.S. economy could be slipping into a recession, particularly in light of ongoing tariff disputes.

# MARKET SELFIE



## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	74102.32	-12.85	-0.02
NIFTY	22497.90	37.60	0.17
MIDCAP	39589.67	282.99	0.72
SMLCAP	44330.32	-314.66	-0.70
BSEFMC	18828.20	-28.35	-0.15
HEALTHCARE	39326.30	136.89	0.35
AUTO	46480.65	-44.18	-0.09
POWER	6134.05	6.69	0.11
REALTY	6453.30	243.69	3.92
BSE IT	36677.74	-322.12	-0.87
BANKEX	55034.17	-198.09	-0.36
OIL GAS	23682.66	368.76	1.58
METAL	30121.43	185.07	0.62
INDIA VIX	14.07	0.08	0.57

## ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1223	1777	35
BSE	1480	2491	121

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	4423	4386	1
NSE CASH	86043	77908	10
NSE F&O	147485	140266	5

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	20.00	3.35	1.43
SENSEX	20.63	3.81	1.23

# KEY NUMBERS TRACKER



FII – DII ACTIVITY IN CASH SEGMENT (₹ in Crs)			
FII-DII*	Buy	Sell	Net
DII	10896	8894	2002
FII	8214	11038	(2824)

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)			
FII	Buy	Sell	Net
Index Futures	2954.57	2874.40	80
Index Options	914774.09	894544.64	20229
Stock Futures	19290.38	18668.80	622
Stock Options	49372.61	49811.83	(439)

PUT-CALL RATIO		
Index	Current	Previous
NIFTY	1.09	0.91
BANK NIFTY	0.94	0.93

DOLLAR INDEX			
Dollar Index	Current	Previous	% Change
DXY	103.44	103.90	-0.44

10-YEARS G-SEC YIELD			
Country	Current	Previous	% Change
INDIA	6.694	6.701	-0.10
USA	4.230	4.213	0.40

KEY COMMODITIES TRACKER (in \$)			
Commodity	Current	Change Points	% Change
Gold	2911.04	26.40	0.92
Silver	32.49	0.50	1.57
Crude-Oil	66.43	0.40	0.61
Brent-Crude	69.74	0.46	0.66

# CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES				
Expiry		Close	Change Points	% Change
26 MAR-25	USD-INR	87.30	-0.16	-0.18
26 MAR-25	EUR-INR	95.12	0.21	0.22
26 MAR-25	GBP-INR	112.90	0.00	0.00
26 MAR-25	JPY- INR	59.04	-0.36	-0.60

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS						
Index	Close	S2	S1	Pivot	R1	R2
NIFTY	22498	22238	22368	22445	22575	22652
SENSEX	74102	73455	73779	73987	74310	74519
NIFTY FUTURES	22564	22275	22420	22506	22650	22736
BANK NIFTY	47854	47536	47695	47862	48021	48188
CNX IT	37400	36569	36984	37243	37658	37917
CNX MIDCAP	48763	47449	48106	48489	49146	49529
CNX SMALLCAP	15076	14761	14918	15027	15184	15292
INDIA VIX	14.07	13.26	13.67	14.08	14.49	14.90

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

SECURITIES BAN IN F&O TRADES FOR 12-03-2025
BSE, HINDCOPPER, INDUSINDBK, MANAPPURAM, SAIL



# TECHNICAL VIEWS



## NIFTY

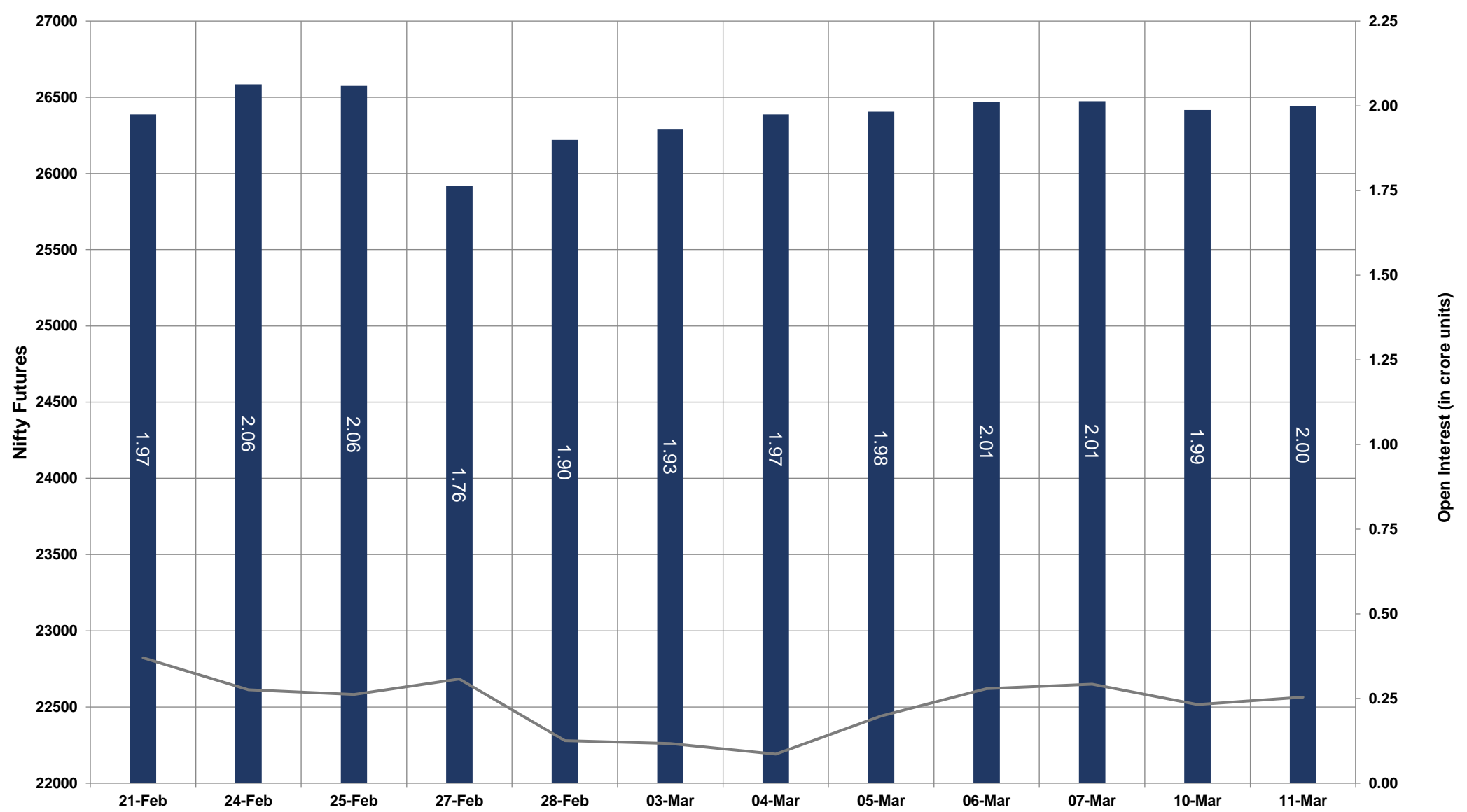


- Nifty Cash = **22497.90 (0.17%)**
- Resistance levels = **22670** and **22750**
- Support levels = **22350** and **22200**

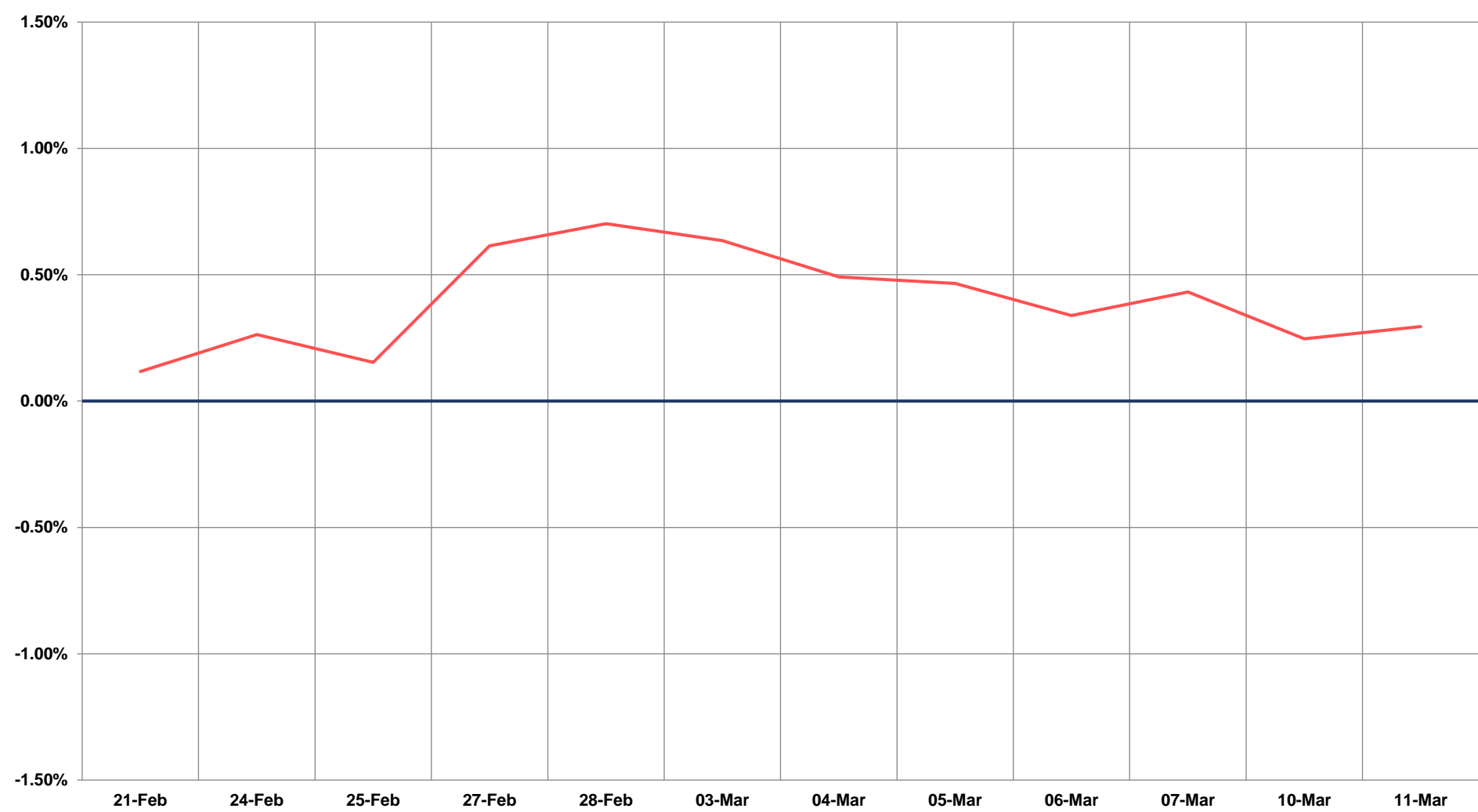
# TECHNICAL VIEWS



## NIFTY FUTURES



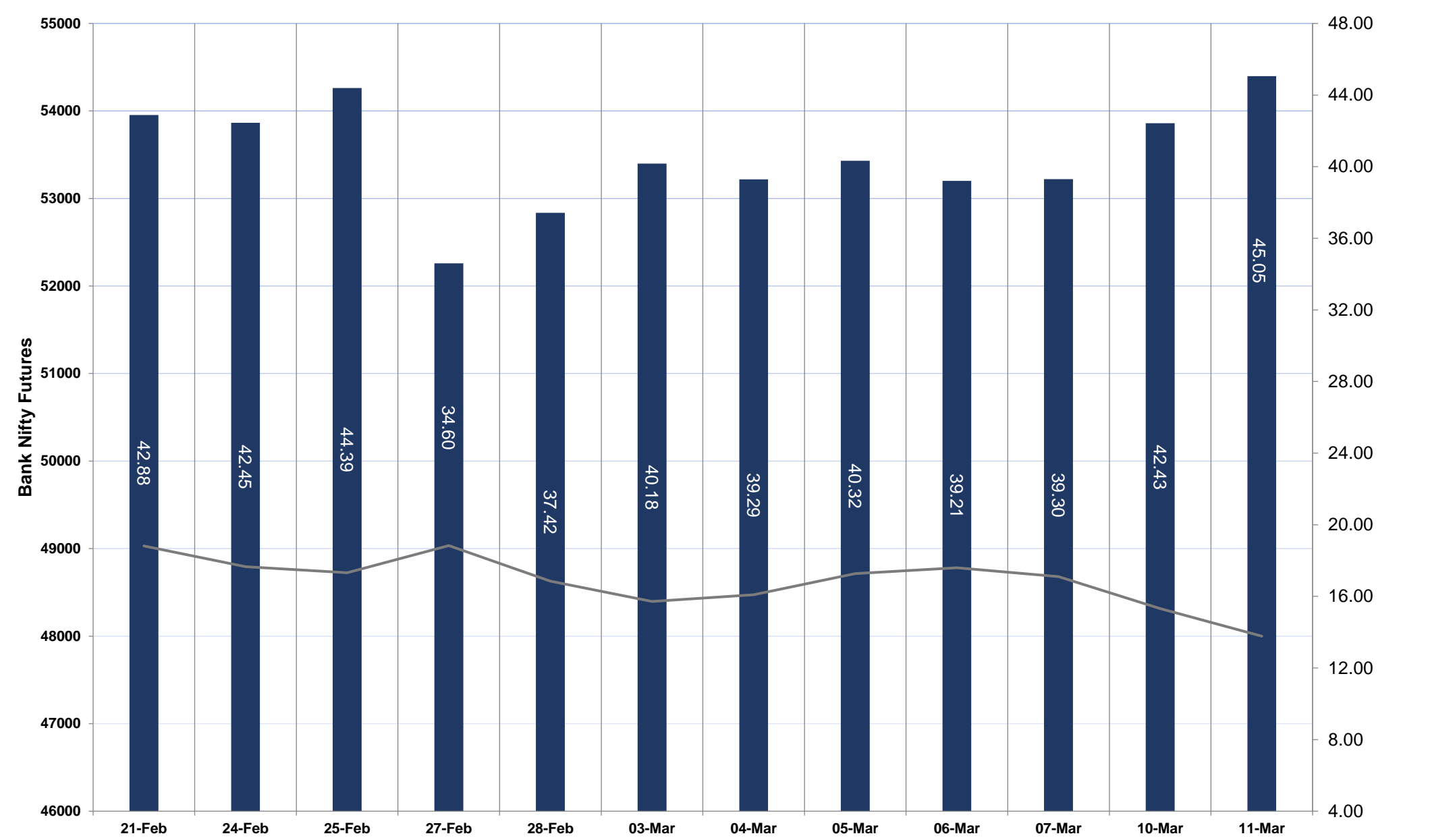
## SPREAD: FUTURE & SPOT



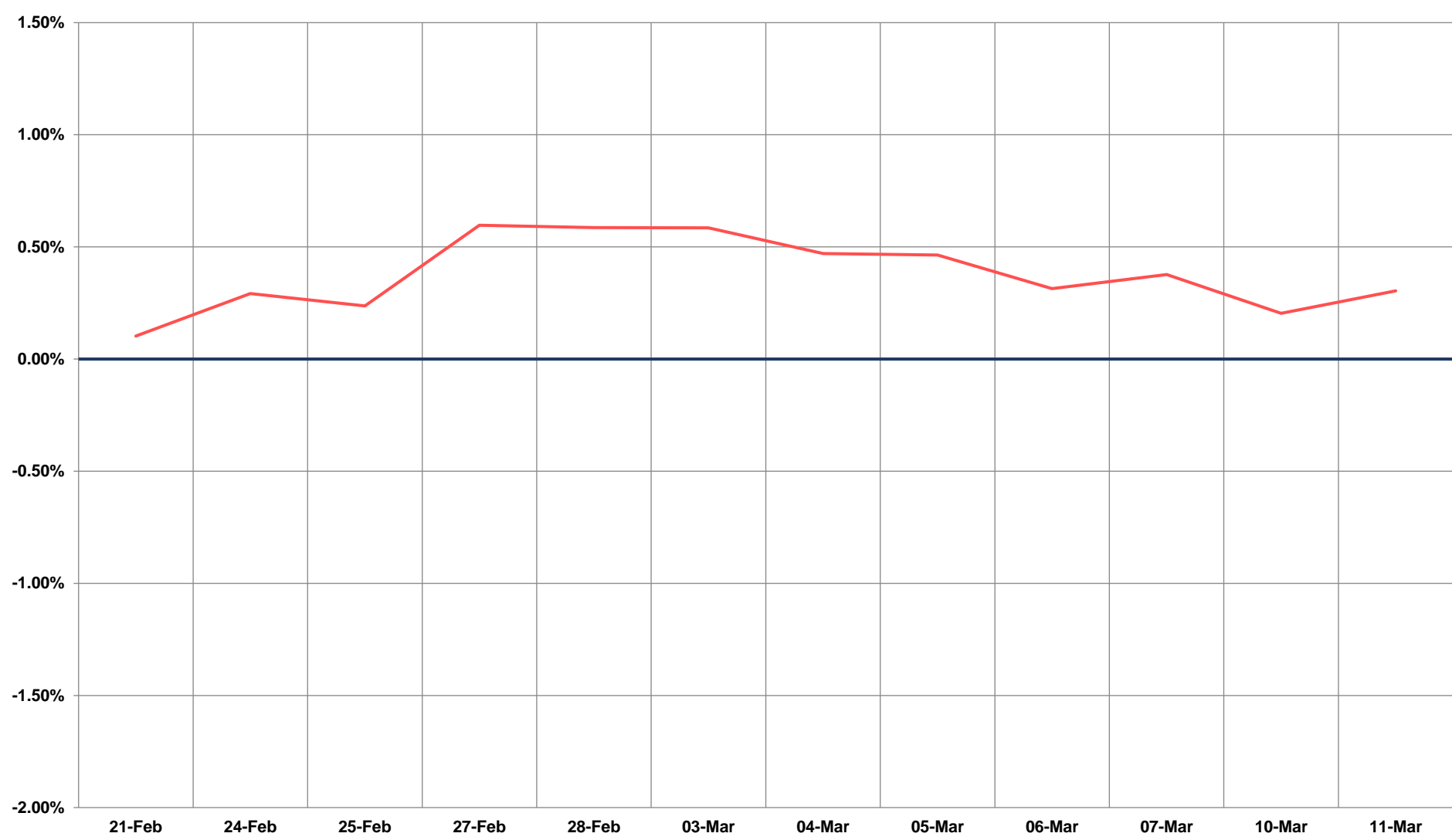
# TECHNICAL VIEWS



## BANK NIFTY FUTURES



## SPREAD: FUTURE & SPOT

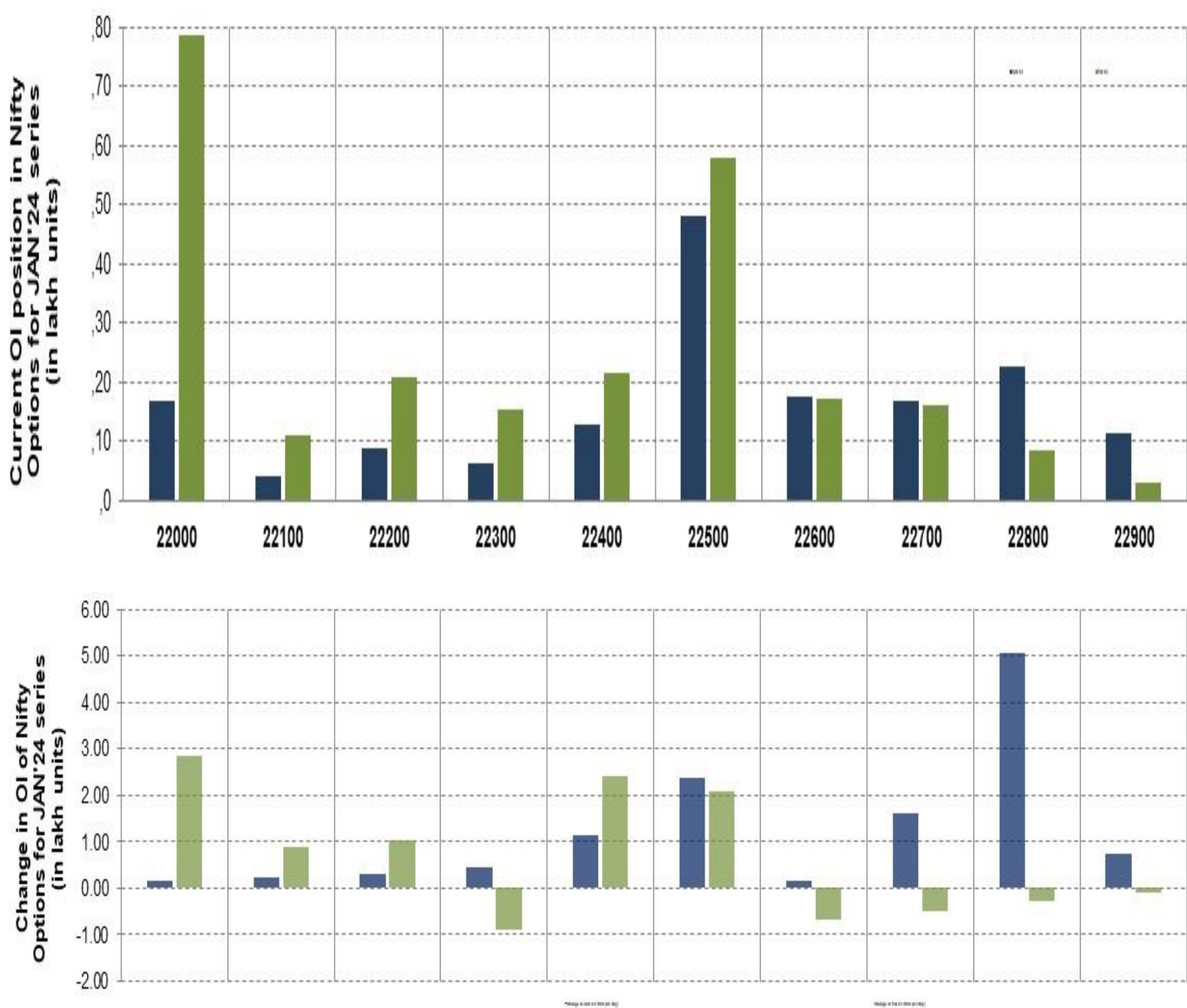




# TECHNICAL VIEWS



## NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.50 million in Open Interests is **Strike Price of 22800**
- **Most Active Nifty Put** with an addition of 0.28 millions in Open Interests is **Strike Price of 22000**
- **Maximum Open Interest** an outstanding was 4.81 millions for Calls at **Strike Price of 22500**
- **Maximum Open Interest** an outstanding was 7.84 millions for puts at **Strike Price of 22000**

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