



MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

MAR 13, 2025



Indian equity benchmarks ended in negative territory on Thursday, driven by ongoing global trade tensions along with selling pressure ahead of the long weekend. Indices made a positive start, as investors took comfort from softer-than-expected inflation data in both the U.S. and India. However, markets gave up all their early gains and settled deeply in the red, as concerns over the ongoing tariff war led by U.S. President Donald Trump and its potential impact on global growth.

Some of the important factors in today's trade:

Sustained FII selling raises concerns: Traders were cautious as exchange data showed foreign institutional investors (FIIs) offloaded equities worth Rs 1,627.61 crore on a net basis on Wednesday.

Tariff tensions rise as Canada, EU retaliate: Tariff worries kept investors on the edge after Canada and the EU swiftly retaliated against U.S. steel and aluminum tariffs and President Trump vowed to respond to the countermeasures.

India's retail inflation eases to 3.61% in February: Traders overlooked Consumer Price Index (CPI)-based retail inflation slipped to a seven-month low of 3.61 per cent in February mainly due to easing prices of vegetables, eggs, and other protein-rich items, creating space for the RBI to go for another cut in interest rate next month.

Global front: European markets were trading mostly in green, as markets weigh macroeconomic concerns against optimism that U.S. negotiators could secure a ceasefire in the Ukraine war. Most of the Asian markets ended in red, after Malaysia's industrial output growth eased to a 10-month low in January amid a contraction in the mining sector.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	73828.91	-200.85	-0.27
NIFTY	22397.20	-73.30	-0.33
MIDCAP	39062.82	-301.77	-0.77
SMLCAP	43844.98	-272.83	-0.62
BSEFMC	18820.01	-34.53	-0.18
HEALTHCARE	39295.43	-80.11	-0.20
AUTO	46246.29	-453.32	-0.97
POWER	6149.62	1.94	0.03
REALTY	6227.33	-113.42	-1.79
BSE IT	35395.49	-174.58	-0.49
BANKEX	55312.65	78.04	0.14
OIL GAS	23653.85	-71.38	-0.30
METAL	29743.73	-239.95	-0.80
INDIA VIX	13.28	-0.41	-2.99

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1111	1864	32
BSE	1529	2448	128

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	4388	4883	(10)
NSE CASH	72201	85532	(16)
NSE F&O	127645	157176	(19)

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	19.91	3.33	1.44
SENSEX	20.55	3.80	1.24

KEY NUMBERS TRACKER



FII – DII ACTIVITY IN CASH SEGMENT (₹ in Crs)			
FII-DII*	Buy	Sell	Net
DII	10032	8309	1724
FII	11601	12394	(793)

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)			
FII	Buy	Sell	Net
Index Futures	2605.02	2749.06	(144)
Index Options	2235440.69	2310714.82	(75274)
Stock Futures	14477.40	16483.93	(2007)
Stock Options	46932.09	48279.56	(1347)

PUT-CALL RATIO		
Index	Current	Previous
NIFTY	0.86	0.97
BANK NIFTY	0.94	0.98

DOLLAR INDEX			
Dollar Index	Current	Previous	% Change
DXY	103.67	103.57	0.10

10-YEARS G-SEC YIELD			
Country	Current	Previous	% Change
INDIA	6.698	6.683	0.22
USA	4.340	4.316	0.56

KEY COMMODITIES TRACKER (in \$)			
Commodity	Current	Change Points	% Change
Gold	2947.42	9.48	0.32
Silver	33.12	-0.13	-0.42
Crude-Oil	67.27	-0.41	-0.61
Brent-Crude	70.62	-0.33	-0.47

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES

Expiry	Close	Change Points	% Change
26 MAR-25 USD-INR	87.32	0.00	0.00
26 MAR-25 EUR-INR	95.29	0.19	0.19
26 MAR-25 GBP-INR	113.10	0.29	0.26
26 MAR-25 JPY- INR	58.90	-0.14	-0.24

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS

Index	Close	S2	S1	Pivot	R1	R2
NIFTY	22397	22264	22330	22444	22511	22625
SENSEX	73829	73370	73599	74000	74230	74631
NIFTY FUTURES	22444	22311	22378	22497	22563	22682
BANK NIFTY	48060	47793	47927	48140	48273	48486
CNX IT	36123	35577	35850	36221	36494	36866
CNX MIDCAP	48125	47595	47860	48302	48567	49009
CNX SMALLCAP	14897	14728	14813	14966	15050	15203
INDIA VIX	13.28	12.77	13.02	13.48	13.73	14.19

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	SELL	Buy
CNX MIDCAP	SELL	SELL	Buy
CNX SMALLCAP	SELL	SELL	Buy
INDIA VIX	SELL	SELL	SELL

SECURITIES BAN IN F&O TRADES FOR 17-03-2025

BSE, HINDCOPPER, INDUSINDBK, MANAPPURAM, SAIL

TECHNICAL VIEWS



NIFTY

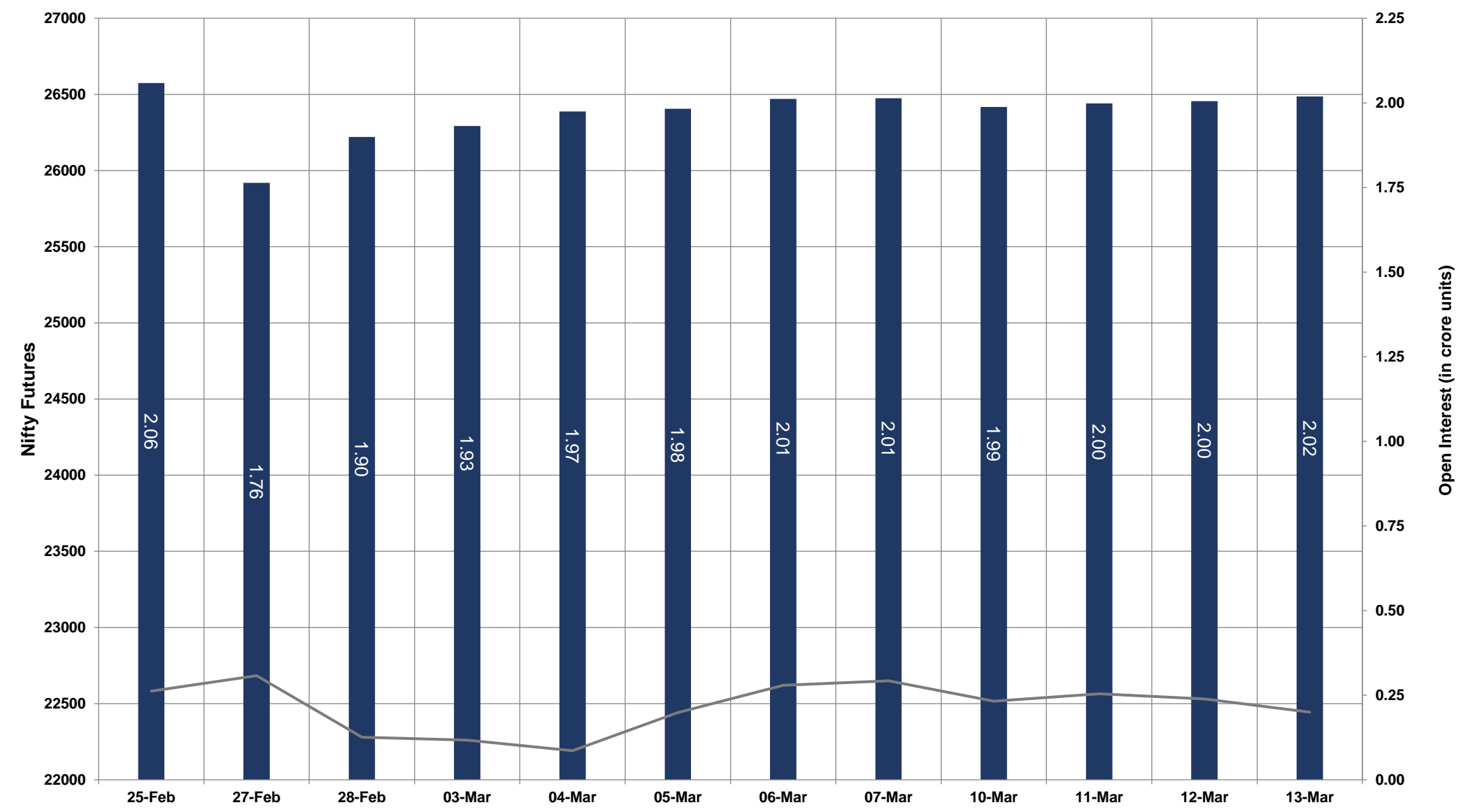


- Nifty Cash = **22470.50 (-0.12%)**
- Resistance levels = **22670** and **22750**
- Support levels = **22350** and **22200**

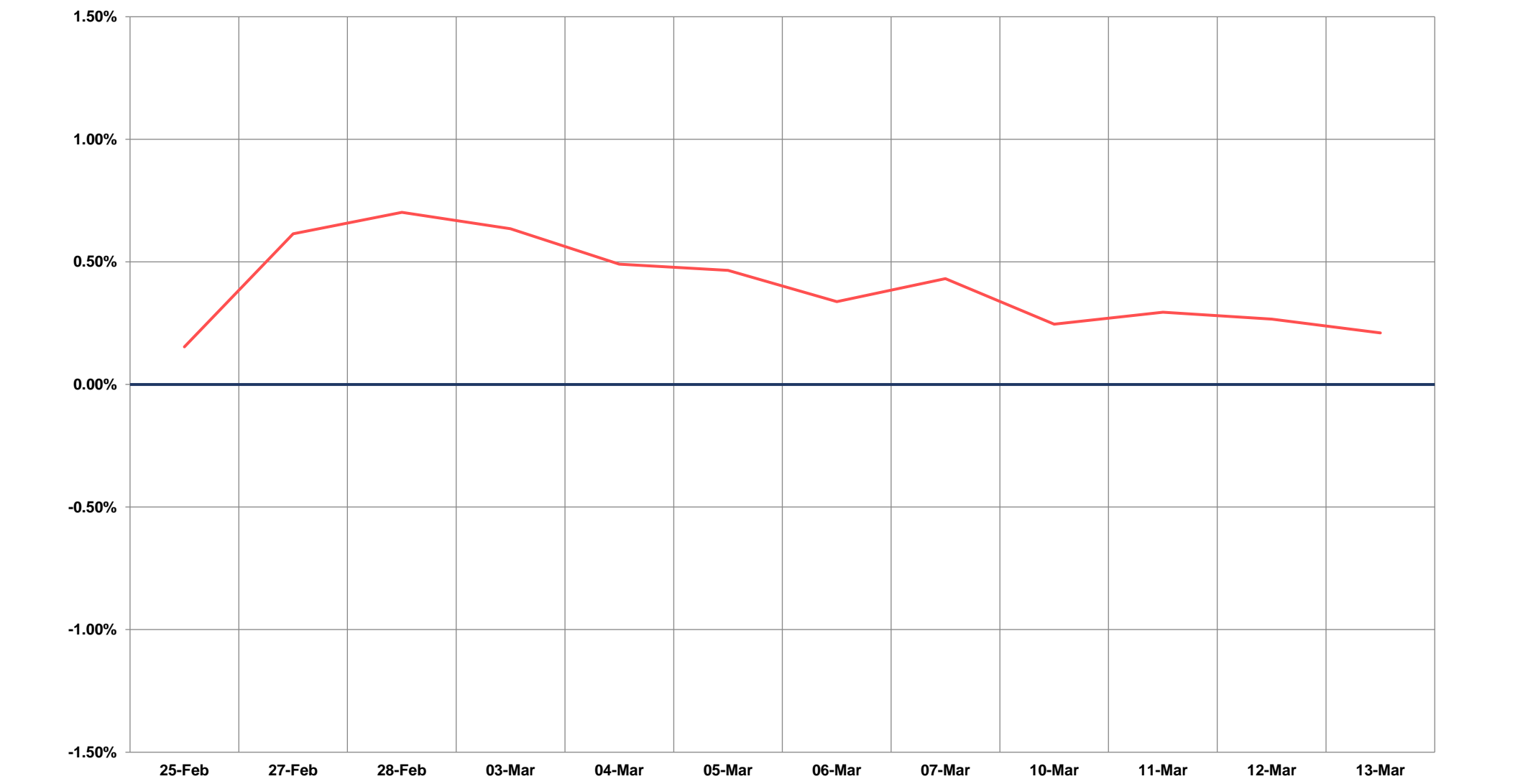
TECHNICAL VIEWS



NIFTY FUTURES



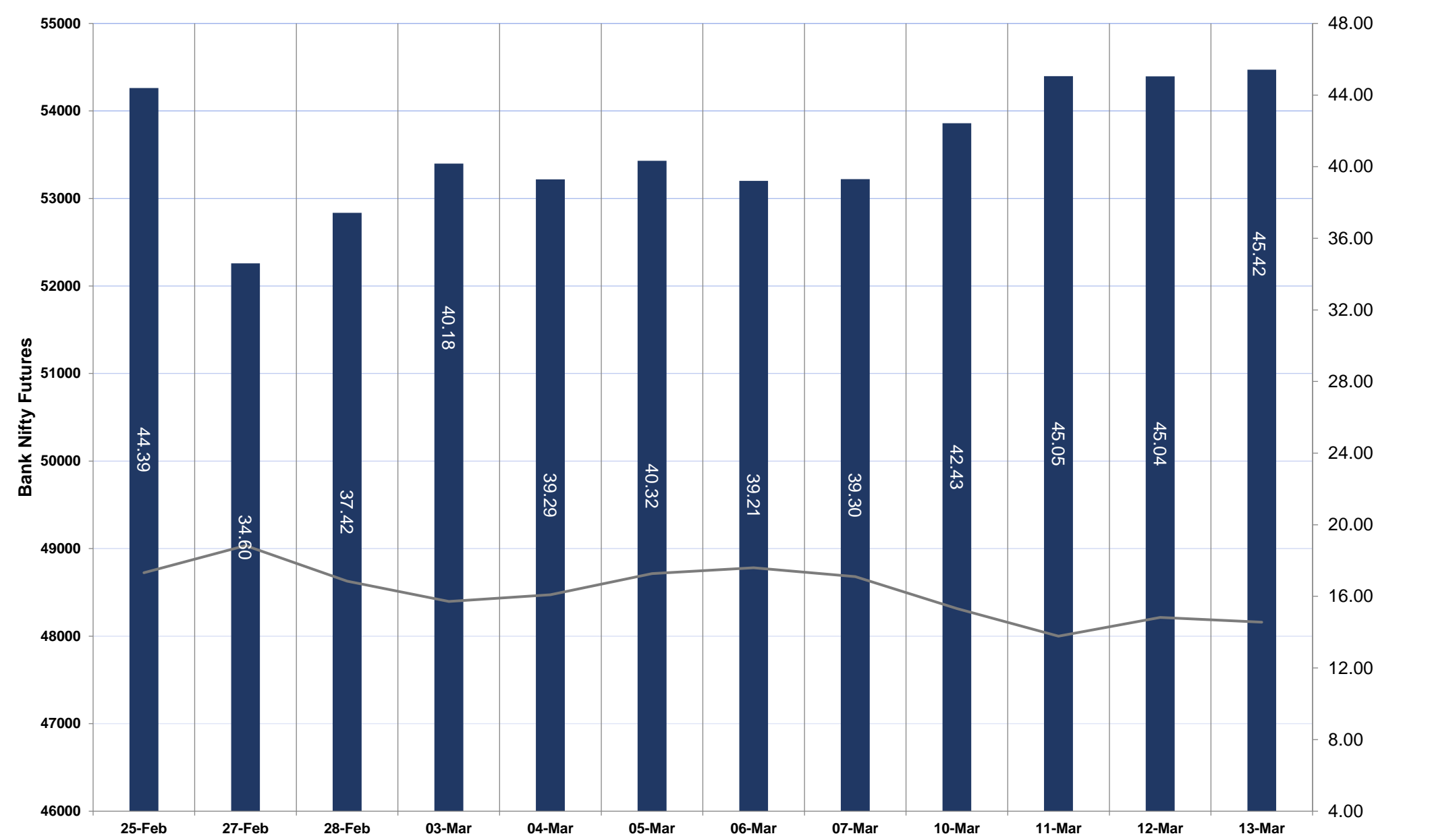
SPREAD: FUTURE & SPOT



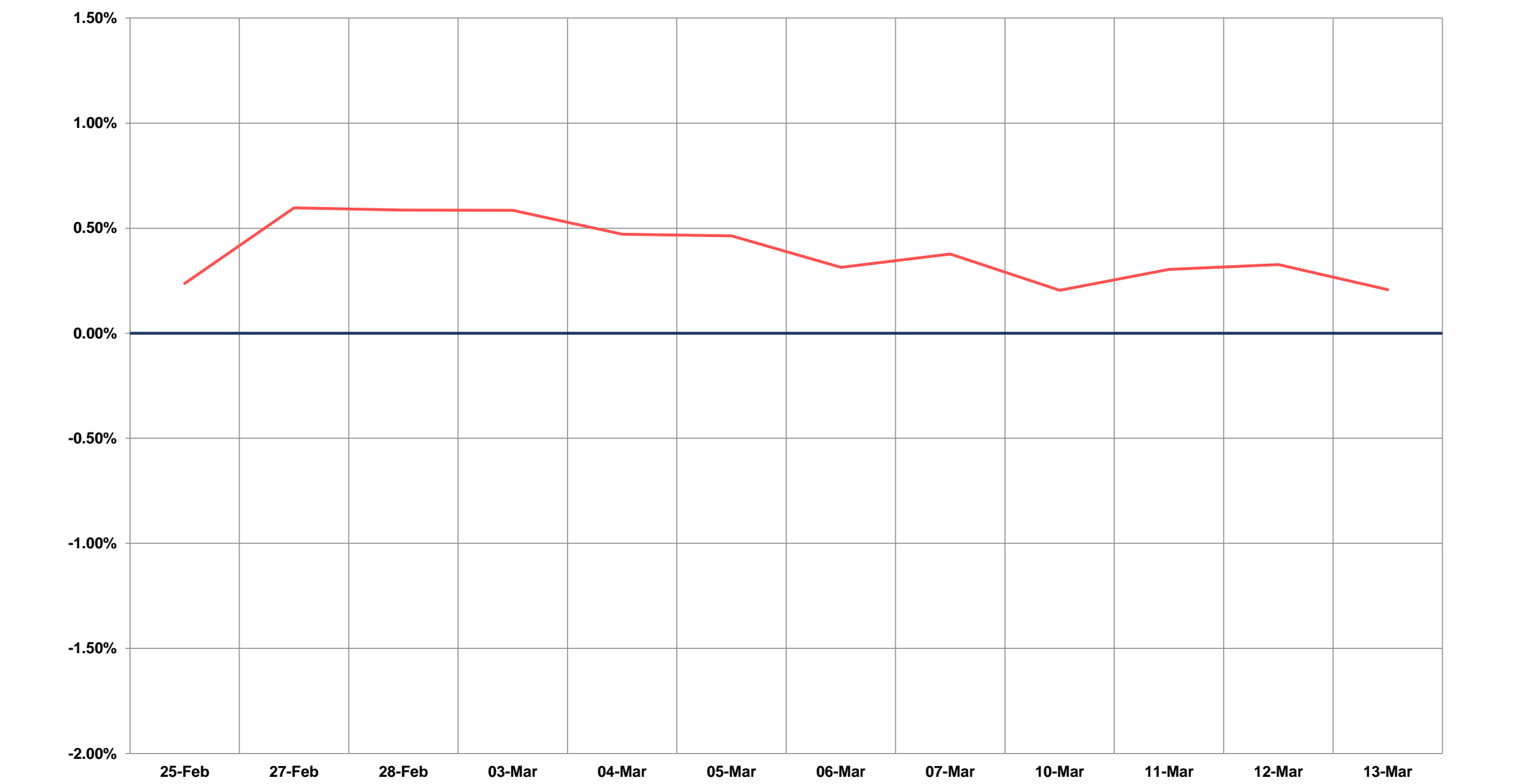
TECHNICAL VIEWS



BANK NIFTY FUTURES



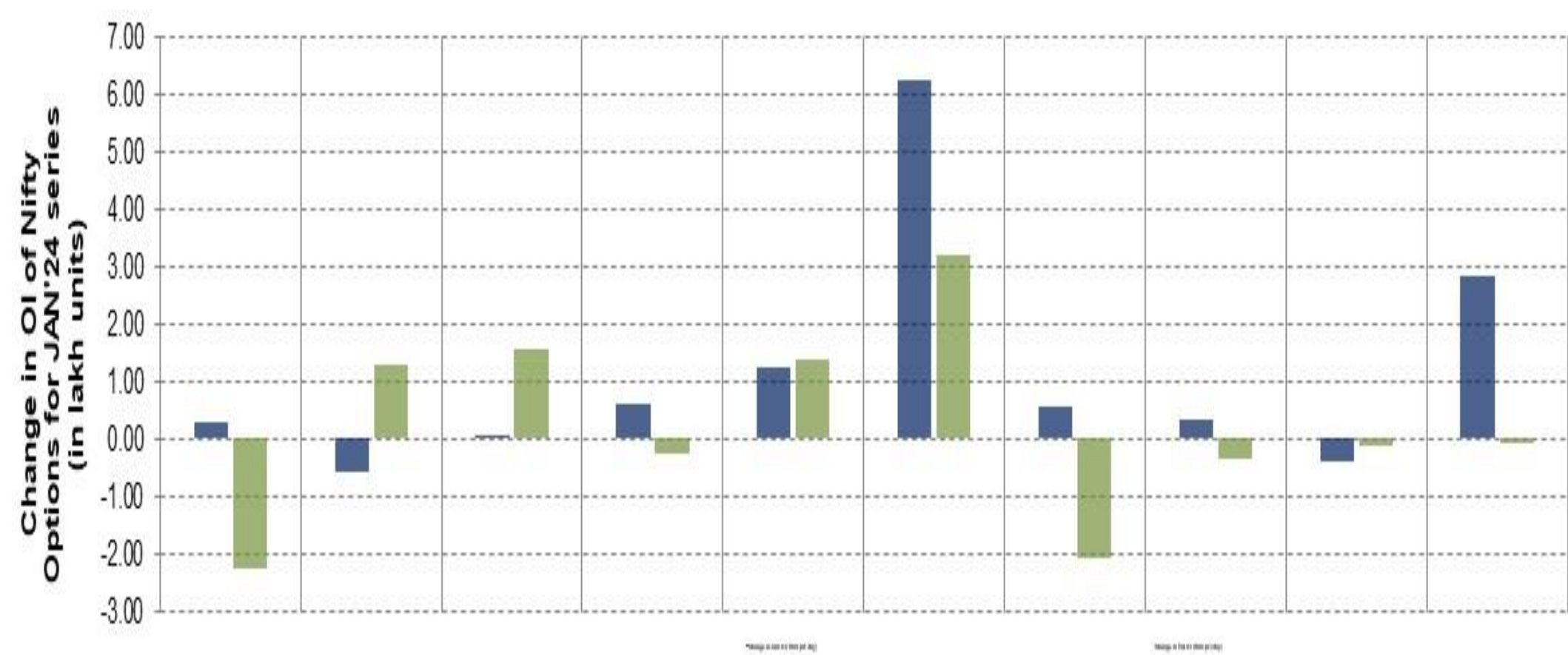
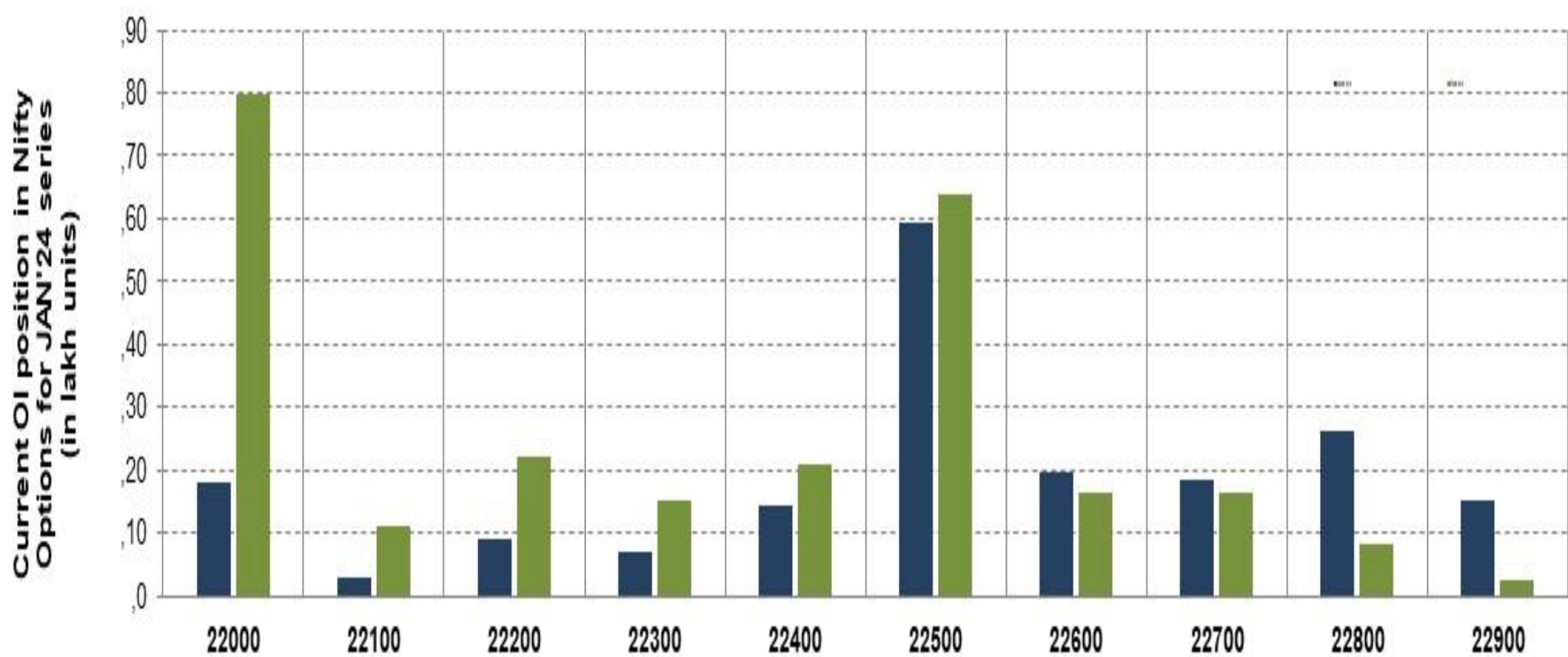
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.62 million in Open Interests is **Strike Price of 22500**
- **Most Active Nifty Put** with an addition of 0.31 millions in Open Interests is **Strike Price of 22500**
- **Maximum Open Interest an outstanding** was 5.92 millions for Calls at **Strike Price of 22500**
- **Maximum Open Interest an outstanding** was 7.97 millions for puts at **Strike Price of 22000**

Disclaimer



The Information provided by SMS or in newsletter or in any document has been prepared by Shah Investor's Home Ltd (SIHL). The Information provided by SMS or in newsletter does not constitute an offer or solicitation for the purchase or sale of any financial instrument or as an official confirmation of any transaction. The information contained herein is from publicly available data or other sources believed to be reliable, but we do not represent that it is accurate or complete and it should not be relied on as such. SIHL or any of its affiliates/ group companies shall not be in any way responsible for any loss or damage that may arise to any person from any error in the information contained in this report or SMS. This Information provided by SMS, reports or in newsletter is provided for assistance only and is not intended to be and must not alone be taken as the basis for an investment decision. The user assumes the entire risk of any use made of this information. Each recipient of this Information provided by SMS, report or in newsletter should make such investigation as it deems necessary to arrive at an independent evaluation of an investment in the securities of companies referred to in this information provided by SMS, report or in newsletter (including the merits and risks involved), and should consult his own advisors to determine the merits and risks of such investment. The investment discussed or views expressed may not be suitable for all investors. This information is strictly confidential and is being furnished to you solely for your information.

The information should not be reproduced or redistributed or passed on directly or indirectly in any form to any other person or published, copied, in whole or in part, for any purpose. The information provided by report or SMS is not directed or intended for distribution to, or use by, any person or entity who is a citizen or resident of or located in any locality, state, country or other jurisdiction, where such distribution, publication, availability or use would be contrary to law, regulation or which would subject SIHL and affiliates/ group companies to any registration or licensing requirements within such jurisdiction. The distribution of this Information provided by SMS or in newsletter in certain jurisdictions may be restricted by law, and persons in whose possession this Information provided by SMS or in newsletter comes, should inform themselves about and observe, any such restrictions. The information given or Information provided by SMS, report or in newsletter is as of the date of the issue date of report or the date on which SMS provided and there can be no assurance that future results or events will be consistent with this information. This information is subject to change without any prior notice. SIHL reserves the right to make modifications and alterations to this statement as may be required from time to time. However, SIHL is under no obligation to update or keep the information current.

Nevertheless, SIHL is committed to providing independent and transparent recommendation to its client and would be happy to provide any information in response to specific client queries. Neither SIHL nor any of its affiliates, group companies, directors, employees, agents or representatives shall be liable for any damages whether direct, indirect, special or consequential including lost revenue or lost profits that may arise from or in connection with the use of the information. Past performance is not necessarily a guide to future performance. The disclosures of interest statements incorporated in the Information provided by SMS, report or in newsletter are provided solely to enhance the transparency and should not be treated as endorsement of the views expressed in the report. The analyst for this report certifies that all of the views expressed in this report accurately reflect his or her personal views about the subject company or companies and its or their securities, and no part of his or her compensation was, is or will be, directly or indirectly related to specific recommendations or views expressed in this report.