



MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

MAR 17, 2025



Indian equity markets wrapped up the trading session in a positive terrain on Monday, driven by gains in financial stocks and strong performances in both U.S. and Asian markets. After a cautious start, markets quickly turned positive and remained higher until the end of the day, as sentiments remained upbeat after Commerce and industry minister Piyush Goyal assured exporters that the government is working overtime to protect India's interests in the proposed Bilateral Trade Agreement (BTA) being negotiated with the United States but said that the country cannot be protectionist at a time when the world is moving towards reciprocity.

Some of the important factors in today's trade:

India's forex reserves up by \$15.27 billion: Traders took note of report that the Reserve Bank said India said foreign exchange reserves increased by \$15.267 billion to \$653.966 billion during the week ended March 7.

India, China saw stronger growth in Q4 2024: Some support came as a UN Trade and Development (UNCTAD) in its Global Trade Update said that the developing nations, particularly India and China, saw better than average trade expansion in the fourth quarter of 2024, while many developed nations experienced trade contractions during the same period.

India's WPI Inflation rises to 2.38% in February: Traders overlooked inflation based on wholesale price index (WPI) in India surged in the month of February to 2.38% as against 2.31% in January, primarily due to increase in prices of electricity and mineral oils.

Global front: European markets were trading in green, ahead of this week's upcoming parliamentary vote on Germany's debt reform deal and the interest rate meetings of three central banks - Federal Reserve, Bank of England and Bank of Japan. Most of the Asian markets ended in green, after U.S. Treasury Secretary Scott Bessent said he is 'not worried' about the recent market downturn and China announced plans featuring measures to boost wages and stabilize stock and real estate markets.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	74169.96	341.05	0.46
NIFTY	22508.75	111.55	0.50
MIDCAP	39364.08	301.26	0.77
SMLCAP	43834.27	-10.71	-0.02
BSEFMC	18780.69	-39.32	-0.21
HEALTHCARE	39733.91	438.48	1.12
AUTO	46618.53	372.24	0.80
POWER	6177.84	28.22	0.46
REALTY	6205.34	-21.99	-0.35
BSE IT	35428.61	33.12	0.09
BANKEX	55706.81	394.16	0.71
OIL GAS	23676.72	22.87	0.10
METAL	30015.49	271.76	0.91
INDIA VIX	13.42	0.14	1.05

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1341	1666	38
BSE	1605	2507	129

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	4423	4388	1
NSE CASH	75425	72201	4
NSE F&O	121748	127645	(5)

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	20.01	3.35	1.43
SENSEX	20.65	3.81	1.23

KEY NUMBERS TRACKER



FII – DII ACTIVITY IN CASH SEGMENT (₹ in Crs)			
FII-DII*	Buy	Sell	Net
DII	12726	6726	6001
FII	11263	15751	(4488)

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)			
FII	Buy	Sell	Net
Index Futures	3213.96	1314.69	1899
Index Options	710502.26	697045.59	13457
Stock Futures	16100.02	12763.71	3336
Stock Options	55459.38	57212.51	(1753)

PUT-CALL RATIO		
Index	Current	Previous
NIFTY	1.04	0.86
BANK NIFTY	1.03	0.94

DOLLAR INDEX			
Dollar Index	Current	Previous	% Change
DXY	103.49	103.70	-0.20

10-YEARS G-SEC YIELD			
Country	Current	Previous	% Change
INDIA	6.690	6.695	-0.07
USA	4.291	4.308	-0.39

KEY COMMODITIES TRACKER (in \$)			
Commodity	Current	Change Points	% Change
Gold	2997.05	14.29	0.48
Silver	33.79	-0.00	-0.01
Crude-Oil	67.82	0.64	0.95
Brent-Crude	71.25	0.67	0.95

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES				
Expiry		Close	Change Points	% Change
26 MAR-25	USD-INR	86.87	-0.26	-0.30
26 MAR-25	EUR-INR	94.77	0.06	0.07
26 MAR-25	GBP-INR	112.59	-0.20	-0.18
26 MAR-25	JPY- INR	58.32	-0.58	-0.98

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS						
Index	Close	S2	S1	Pivot	R1	R2
NIFTY	22509	22256	22382	22480	22606	22703
SENSEX	74170	73534	73852	74114	74432	74694
NIFTY FUTURES	22584	22418	22501	22586	22669	22753
BANK NIFTY	48354	48059	48206	48344	48492	48629
CNX IT	36137	35703	35920	36045	36262	36387
CNX MIDCAP	48462	47878	48170	48431	48723	48985
CNX SMALLCAP	14968	14777	14873	14984	15080	15192
INDIA VIX	13.42	12.78	13.10	13.60	13.92	14.42

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	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 18-03-2025
BSE, HINDCOPPER, INDUSINDBK, MANAPPURAM, SAIL

TECHNICAL VIEWS



NIFTY

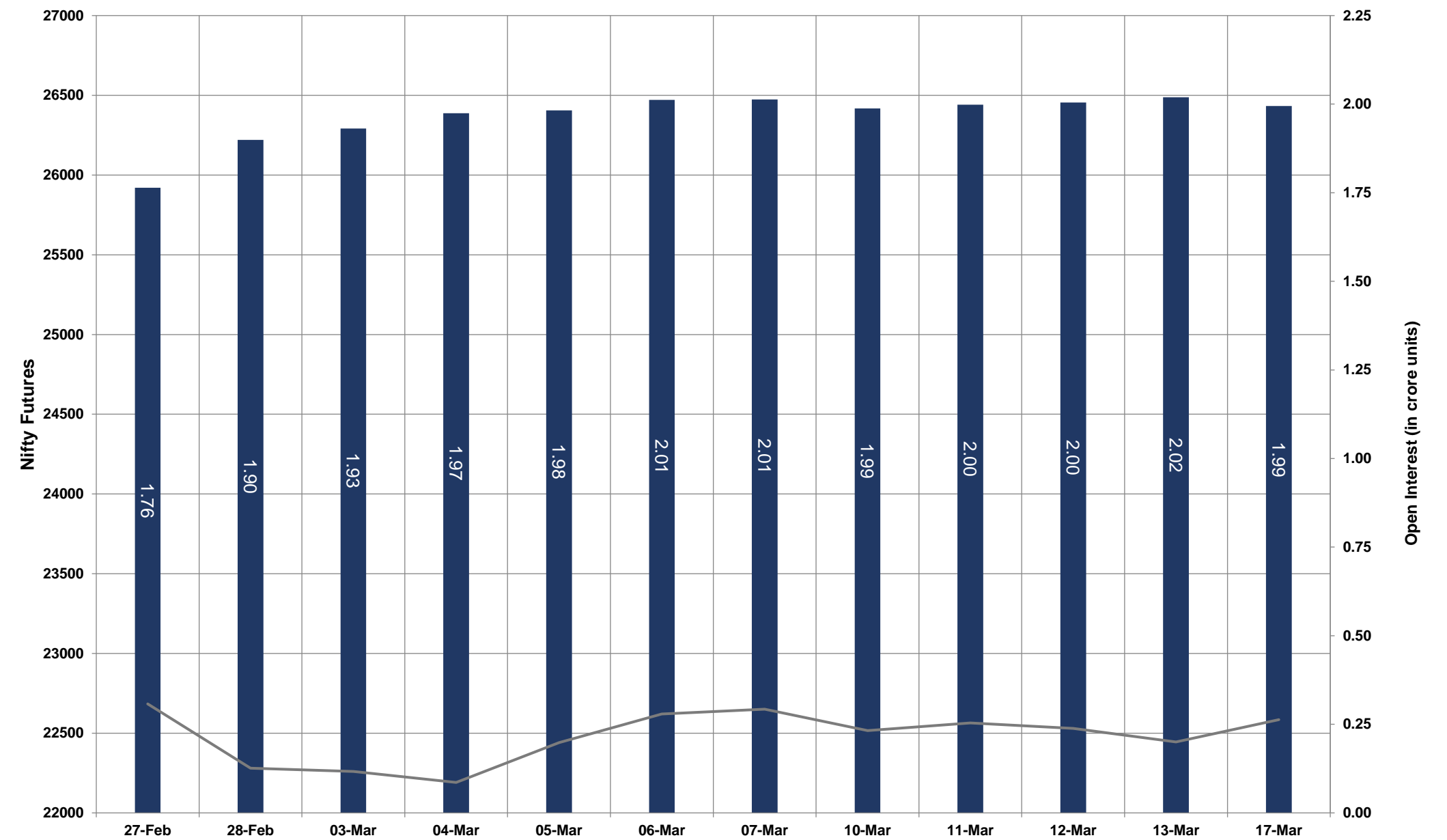


- Nifty Cash = **22508.75 (0.50%)**
- Resistance levels = **22670** and **22750**
- Support levels = **22350** and **22200**

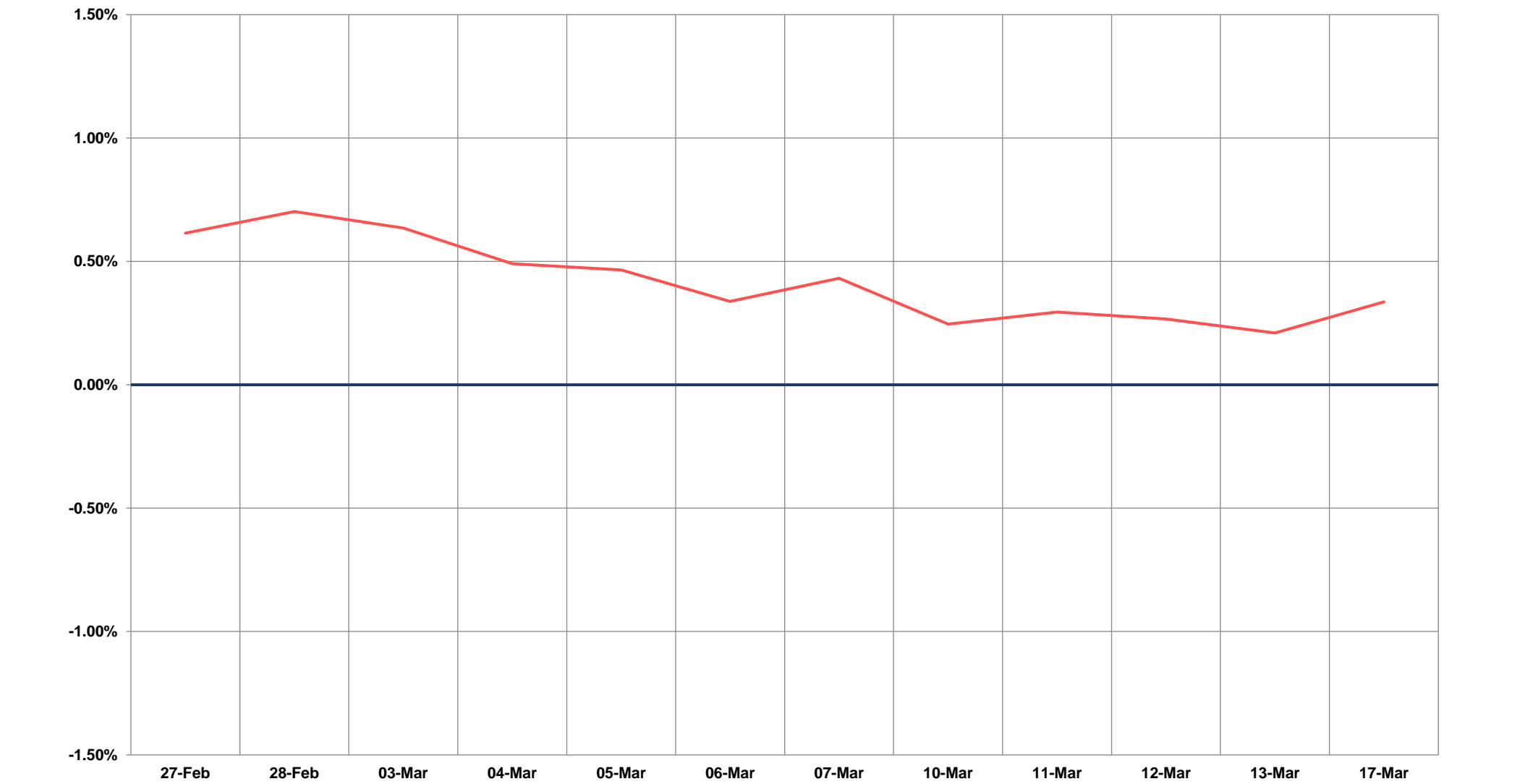
TECHNICAL VIEWS



NIFTY FUTURES



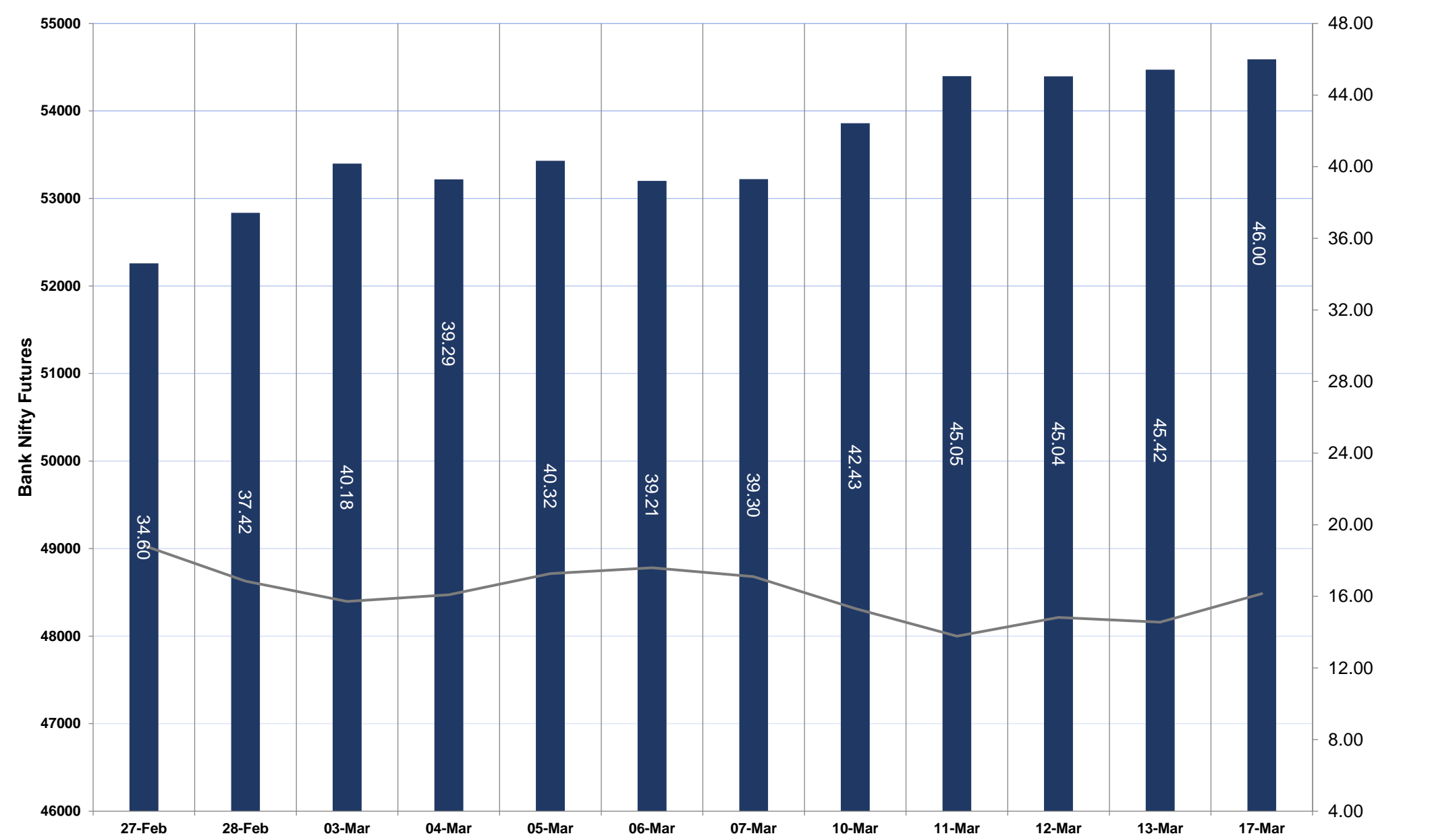
SPREAD: FUTURE & SPOT



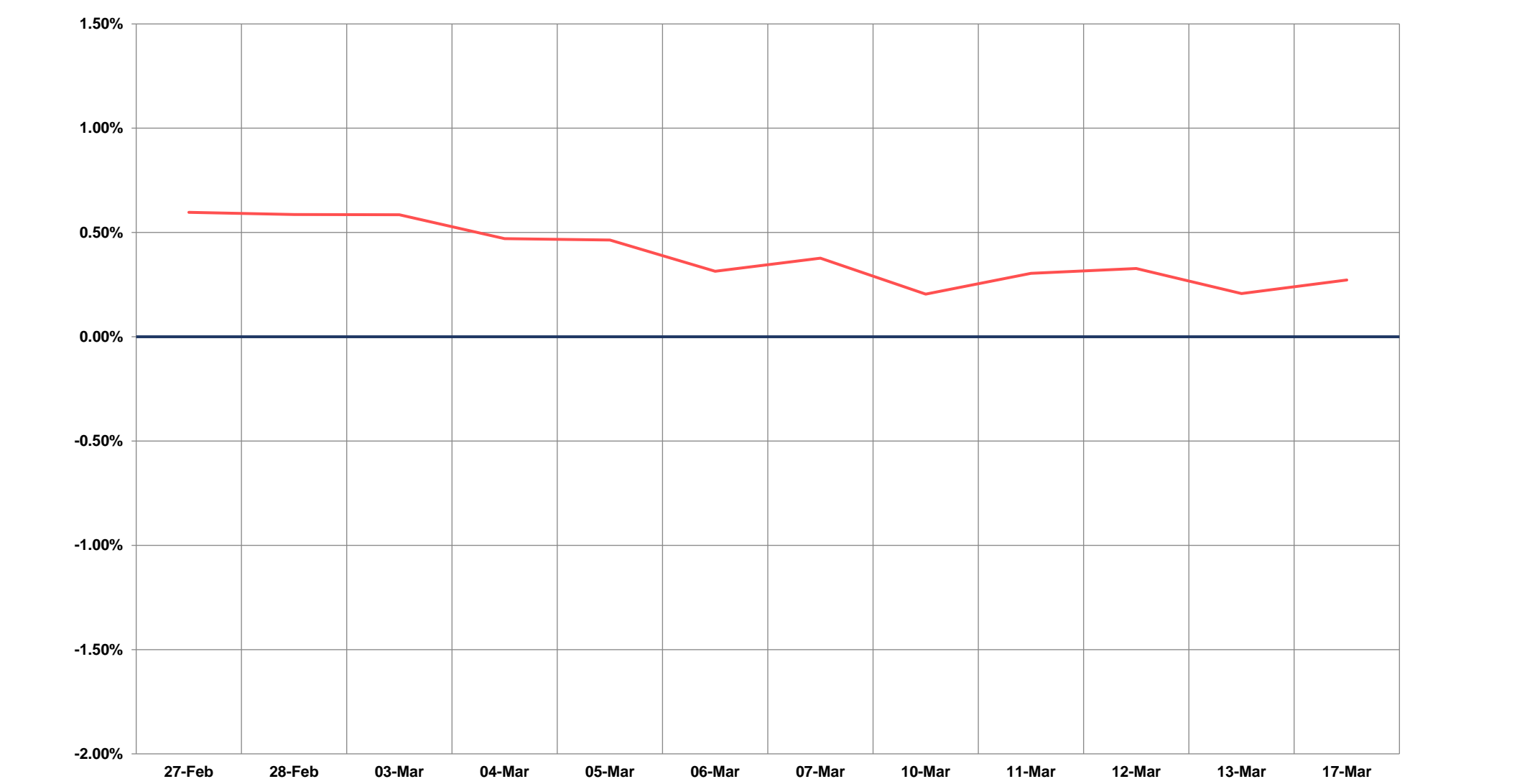
TECHNICAL VIEWS



BANK NIFTY FUTURES



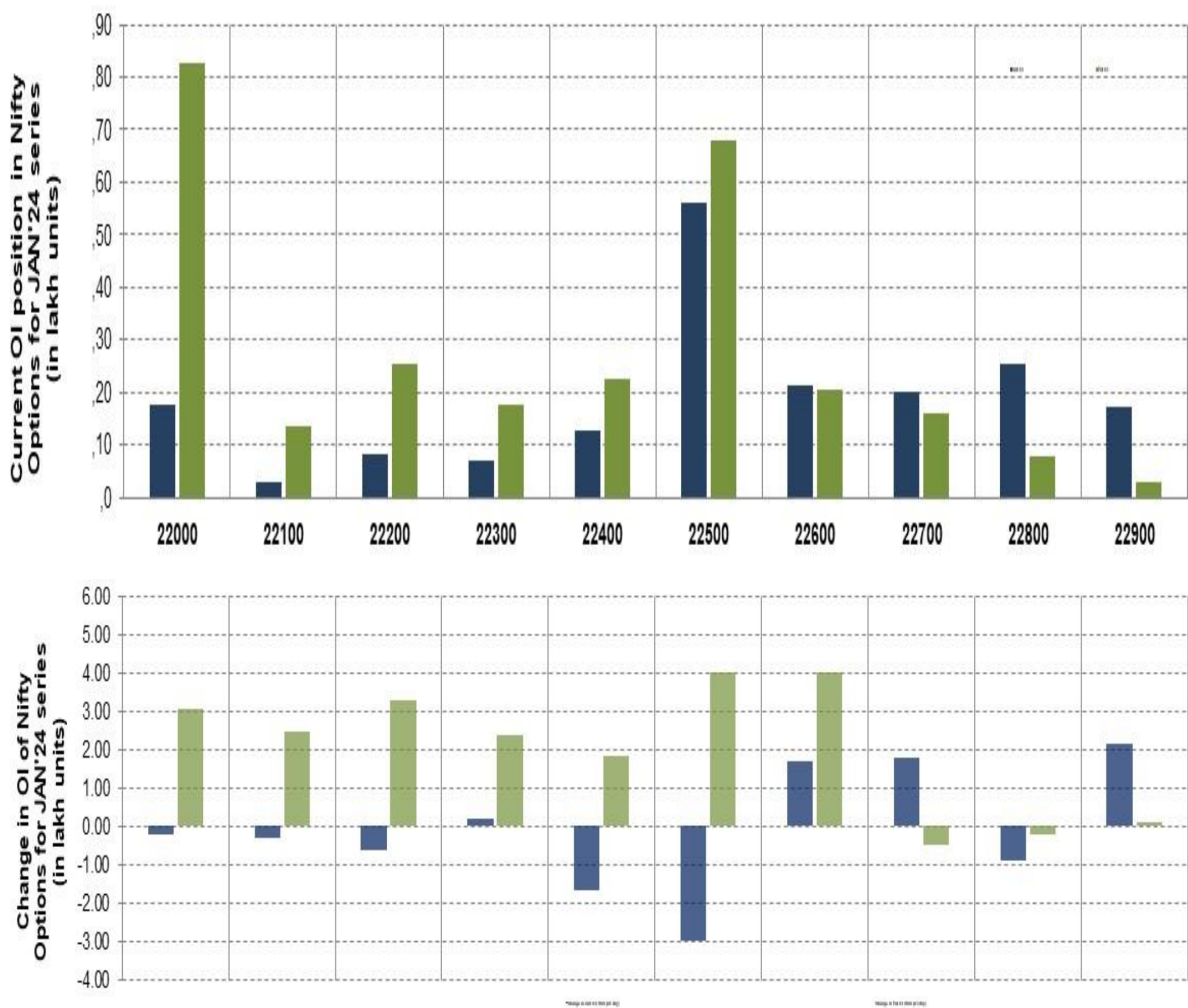
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.21 million in Open Interests is **Strike Price of 22900**
- **Most Active Nifty Put** with an addition of 0.40 millions in Open Interests is **Strike Price of 22500**
- **Maximum Open Interest an outstanding** was 5.62 millions for Calls at **Strike Price of 22500**
- **Maximum Open Interest an outstanding** was 8.28 millions for puts at **Strike Price of 22000**

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