



MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

MAR 19, 2025



Indian equity markets ended in a positive terrain on Wednesday, driven by foreign fund inflows and robust performance in Financial and Metal stocks. Indices made a cautious start, as investors remained concerned ahead of the U.S. Federal Reserve's policy announcement later today and geopolitical tensions escalated as Israeli airstrikes pounded Gaza. However, as the day progressed, markets gained momentum and traded in green for most part of the day.

Some of the important factors in today's trade:

FII's turn net buyers: Following 17 consecutive sessions of net selling, foreign institutional investors (FIIs) made a return to the buying side on March 18, purchasing equities worth Rs 694.57 crore.

India, Malaysia agree to speed up ASEAN FTA review: Some support came as commerce ministry said that India and Malaysia have agreed to take steps to speed up the review of the ASEAN-India Trade in Goods Agreement (AITIGA) for its substantial conclusion by 2025.

India, New Zealand aim to finalize FTA: Traders took support with Commerce Minister Piyush Goyal's statement that India and New Zealand are working to finalize a comprehensive and mutually beneficial Free Trade Agreement (FTA).

Global front: Most of the European markets were trading in red, amid economic headwinds both at home and abroad, the Bank of England is widely expected to hold interest rates when it meets on Thursday. Asian markets ended mixed, after the Bank of Japan left its interest rate unchanged after hiking the rate by a quarter-point early this year.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	75449.05	147.79	0.20
NIFTY	22907.60	73.30	0.32
MIDCAP	41107.00	917.47	2.28
SMLCAP	46009.89	978.44	2.17
BSEFMC	18968.74	-82.33	-0.43
HEALTHCARE	40985.80	509.05	1.26
AUTO	47918.82	173.94	0.36
POWER	6463.01	145.19	2.30
REALTY	6564.08	175.75	2.75
BSE IT	35627.69	-299.16	-0.83
BANKEX	57141.06	331.23	0.58
OIL GAS	24165.50	280.20	1.17
METAL	31019.80	428.65	1.40
INDIA VIX	13.30	0.09	0.68

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	2559	454	32
BSE	3013	1036	117

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	6425	6227	3
NSE CASH	103774	89219	16
NSE F&O	167085	154689	8

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	20.36	3.41	1.41
SENSEX	21.01	3.88	1.21

KEY NUMBERS TRACKER



FII – DII ACTIVITY IN CASH SEGMENT (₹ in Crs)			
FII-DII*	Buy	Sell	Net
DII	13300	11159	2141
FII	15719	16815	(1097)

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)			
FII	Buy	Sell	Net
Index Futures	5106.43	3114.35	1992
Index Options	946716.43	924014.46	22702
Stock Futures	18798.30	18318.82	479
Stock Options	83430.93	82342.10	1089

PUT-CALL RATIO		
Index	Current	Previous
NIFTY	1.20	1.29
BANK NIFTY	1.22	1.19

DOLLAR INDEX			
Dollar Index	Current	Previous	% Change
DXY	103.61	103.24	0.36

10-YEARS G-SEC YIELD			
Country	Current	Previous	% Change
INDIA	6.660	6.672	-0.18
USA	4.298	4.281	0.40

KEY COMMODITIES TRACKER (in \$)			
Commodity	Current	Change Points	% Change
Gold	3028.83	-2.78	-0.09
Silver	33.67	-0.27	-0.82
Crude-Oil	66.51	-0.39	-0.58
Brent-Crude	70.17	-0.39	-0.55

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES

Expiry	Close	Change Points	% Change
26 MAR-25 USD-INR	86.44	-0.18	-0.21
26 MAR-25 EUR-INR	94.25	-0.50	-0.52
26 MAR-25 GBP-INR	112.03	-0.47	-0.42
26 MAR-25 JPY- INR	57.75	-0.05	-0.08

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS

Index	Close	S2	S1	Pivot	R1	R2
NIFTY	22908	22753	22830	22885	22963	23018
SENSEX	75449	75039	75244	75406	75611	75773
NIFTY FUTURES	22973	22825	22899	22946	23020	23067
BANK NIFTY	49703	49129	49416	49612	49899	50094
CNX IT	36224	35426	35825	36203	36602	36980
CNX MIDCAP	50817	49223	50020	50460	51257	51697
CNX SMALLCAP	15748	15283	15515	15649	15881	16015
INDIA VIX	13.30	12.16	12.73	13.15	13.72	14.14

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	NEUTRAL	SELL	Buy
CNX SMALLCAP	NEUTRAL	SELL	Buy
INDIA VIX	SELL	SELL	SELL

SECURITIES BAN IN F&O TRADES FOR 20-03-2025

HINDCOPPER, INDUSINDBK, SAIL	
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TECHNICAL VIEWS



NIFTY

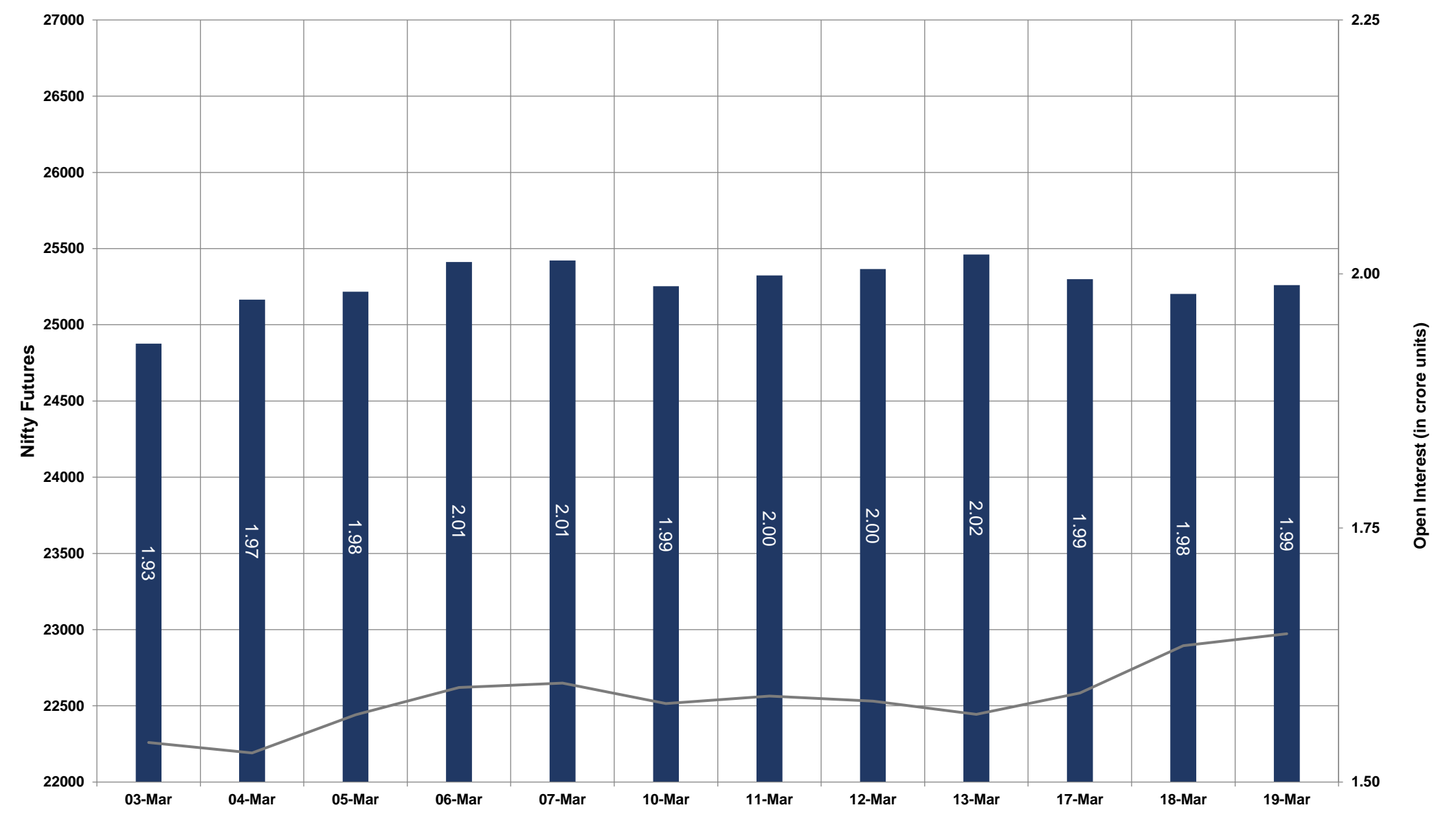


- Nifty Cash = **22907.60 (0.32%)**
- Resistance levels = **23050** and **23200**
- Support levels = **22790** and **22650**

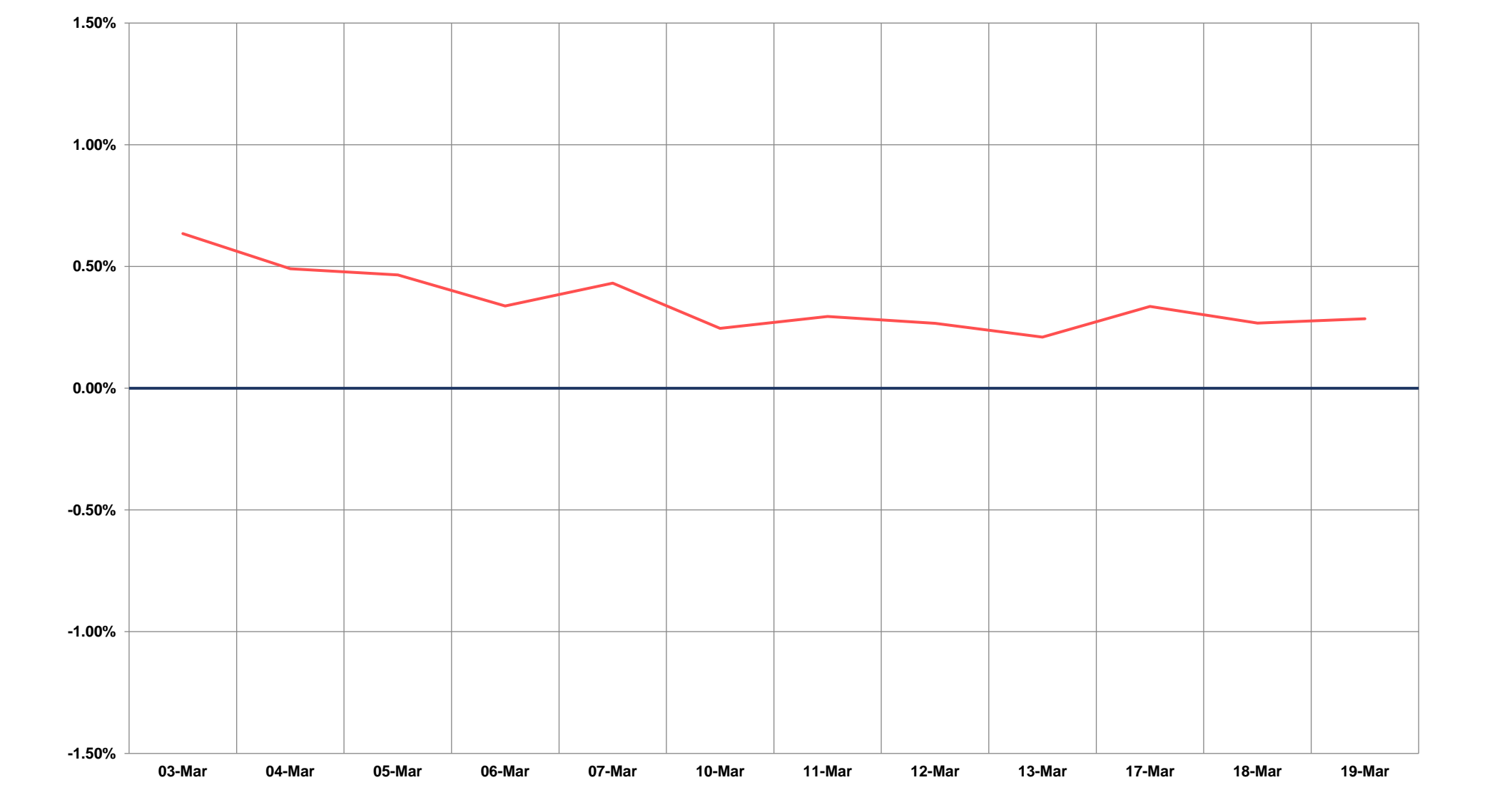
TECHNICAL VIEWS



NIFTY FUTURES



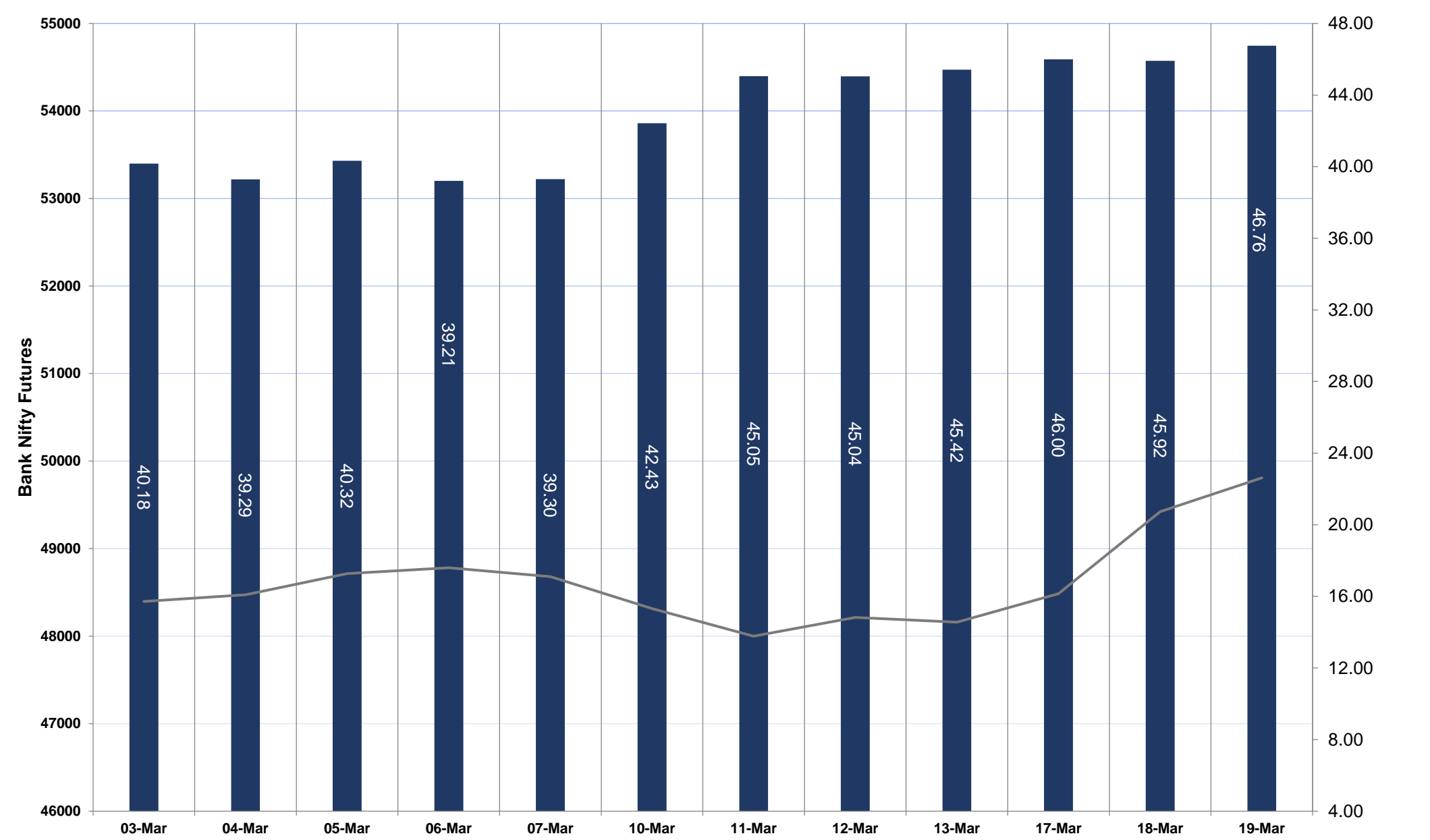
SPREAD: FUTURE & SPOT



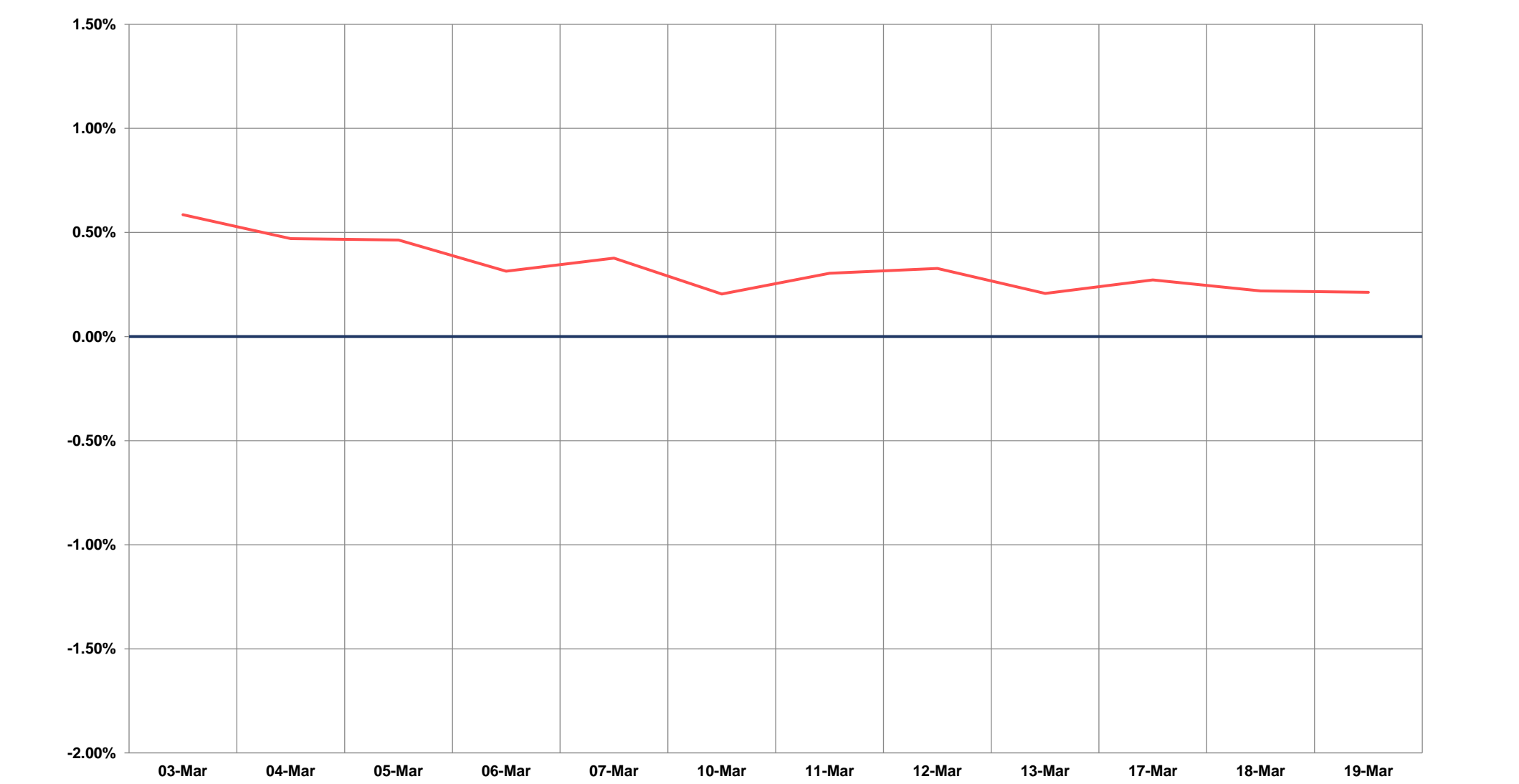
TECHNICAL VIEWS



BANK NIFTY FUTURES



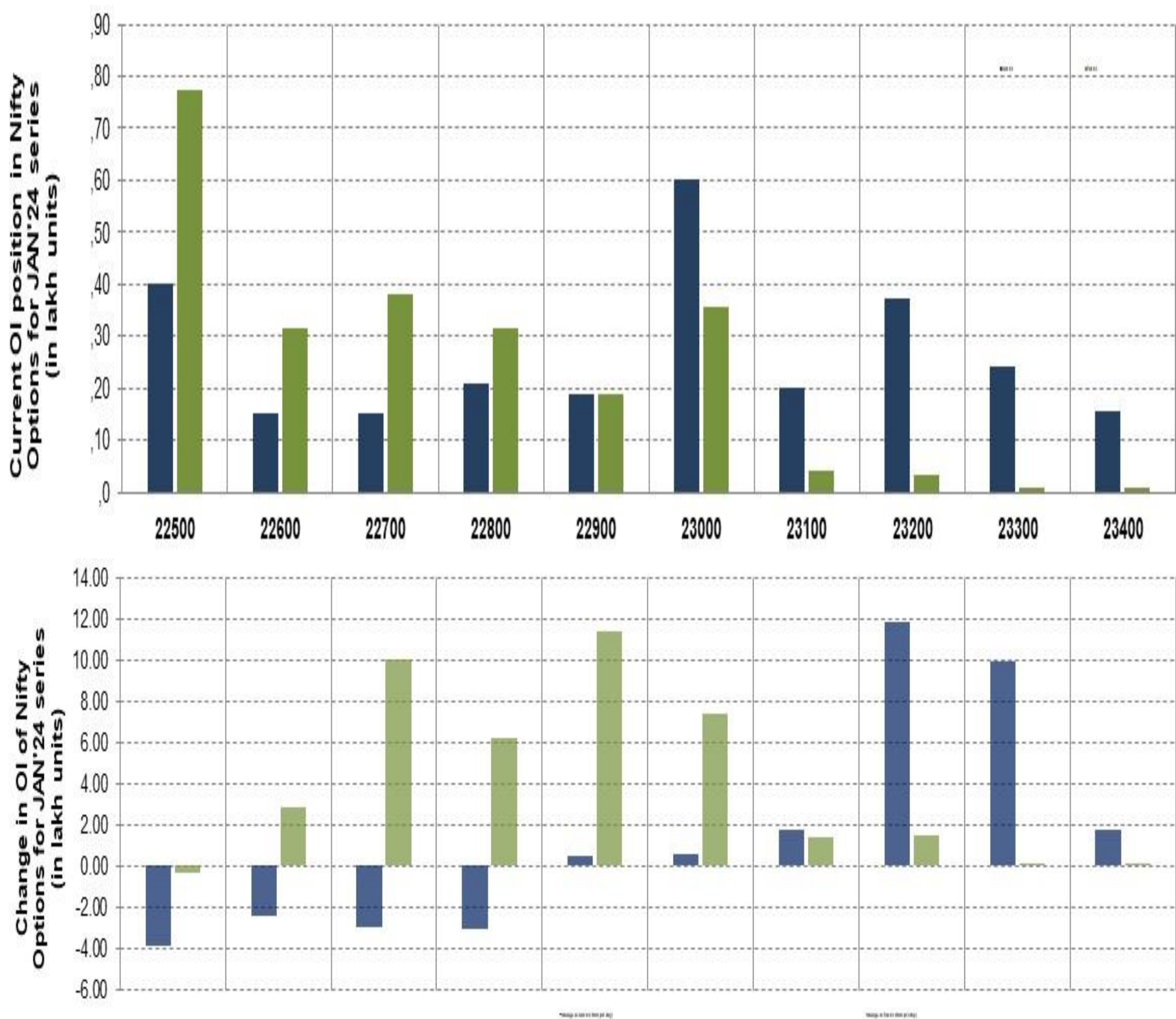
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 1.18 million in Open Interests is **Strike Price of 23200**
- **Most Active Nifty Put** with an addition of 1.13 millions in Open Interests is **Strike Price of 22900**
- **Maximum Open Interest an outstanding** was 6.00 millions for Calls at **Strike Price of 23000**
- **Maximum Open Interest an outstanding** was 7.75 millions for puts at **Strike Price of 22500**

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