



MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

MAR 20, 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	76348.06	899.02	1.19
NIFTY	23190.65	283.05	1.24
MIDCAP	41359.70	252.70	0.61
SMLCAP	46344.59	334.70	0.73
BSEFMC	19180.60	211.86	1.12
HEALTHCARE	41477.53	491.73	1.20
AUTO	48584.80	665.98	1.39
POWER	6476.54	13.53	0.21
REALTY	6636.96	72.88	1.11
BSE IT	36082.47	454.78	1.28
BANKEX	57507.67	366.61	0.64
OIL GAS	24543.35	377.85	1.56
METAL	31314.21	294.41	0.95
INDIA VIX	12.60	-0.70	-5.26

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1996	1003	36
BSE	2410	1606	130

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	5629	6425	(12)
NSE CASH	104176	103774	0
NSE F&O	205815	167085	23

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	20.61	3.45	1.39
SENSEX	21.26	3.93	1.20

KEY NUMBERS TRACKER



FII – DII ACTIVITY IN CASH SEGMENT (₹ in Crs)			
FII-DII*	Buy	Sell	Net
DII	11784	14920	(3136)
FII	16328	13089	3239

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)			
FII	Buy	Sell	Net
Index Futures	6625.46	3692.02	2933
Index Options	2084868.59	2151379.60	(66511)
Stock Futures	25941.65	22688.63	3253
Stock Options	97445.64	99502.34	(2057)

PUT-CALL RATIO		
Index	Current	Previous
NIFTY	1.15	1.20
BANK NIFTY	1.18	1.22

DOLLAR INDEX			
Dollar Index	Current	Previous	% Change
DXY	103.83	103.46	0.37

10-YEARS G-SEC YIELD			
Country	Current	Previous	% Change
INDIA	6.638	6.660	-0.33
USA	4.181	4.256	-1.76

KEY COMMODITIES TRACKER (in \$)			
Commodity	Current	Change Points	% Change
Gold	3036.44	-13.37	-0.44
Silver	33.32	-0.57	-1.70
Crude-Oil	67.18	0.27	0.40
Brent-Crude	71.04	0.26	0.37

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES

Expiry		Close	Change Points	% Change
26 MAR-25	USD-INR	86.38	-0.06	-0.07
26 MAR-25	EUR-INR	93.70	-0.56	-0.60
26 MAR-25	GBP-INR	111.89	-0.15	-0.13
26 MAR-25	JPY- INR	58.13	0.38	0.65

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS

Index	Close	S2	S1	Pivot	R1	R2
NIFTY	23191	22884	23038	23127	23280	23370
SENSEX	76348	75391	75870	76163	76641	76935
NIFTY FUTURES	23200	22932	23066	23149	23284	23367
BANK NIFTY	50063	49613	49838	49997	50222	50380
CNX IT	36677	36078	36378	36744	37043	37409
CNX MIDCAP	51144	50361	50753	50998	51390	51635
CNX SMALLCAP	15858	15553	15706	15842	15995	16131
INDIA VIX	12.60	12.01	12.31	12.80	13.10	13.59

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	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, MANAPPURAM, POLYCAB, SAIL

TECHNICAL VIEWS



NIFTY

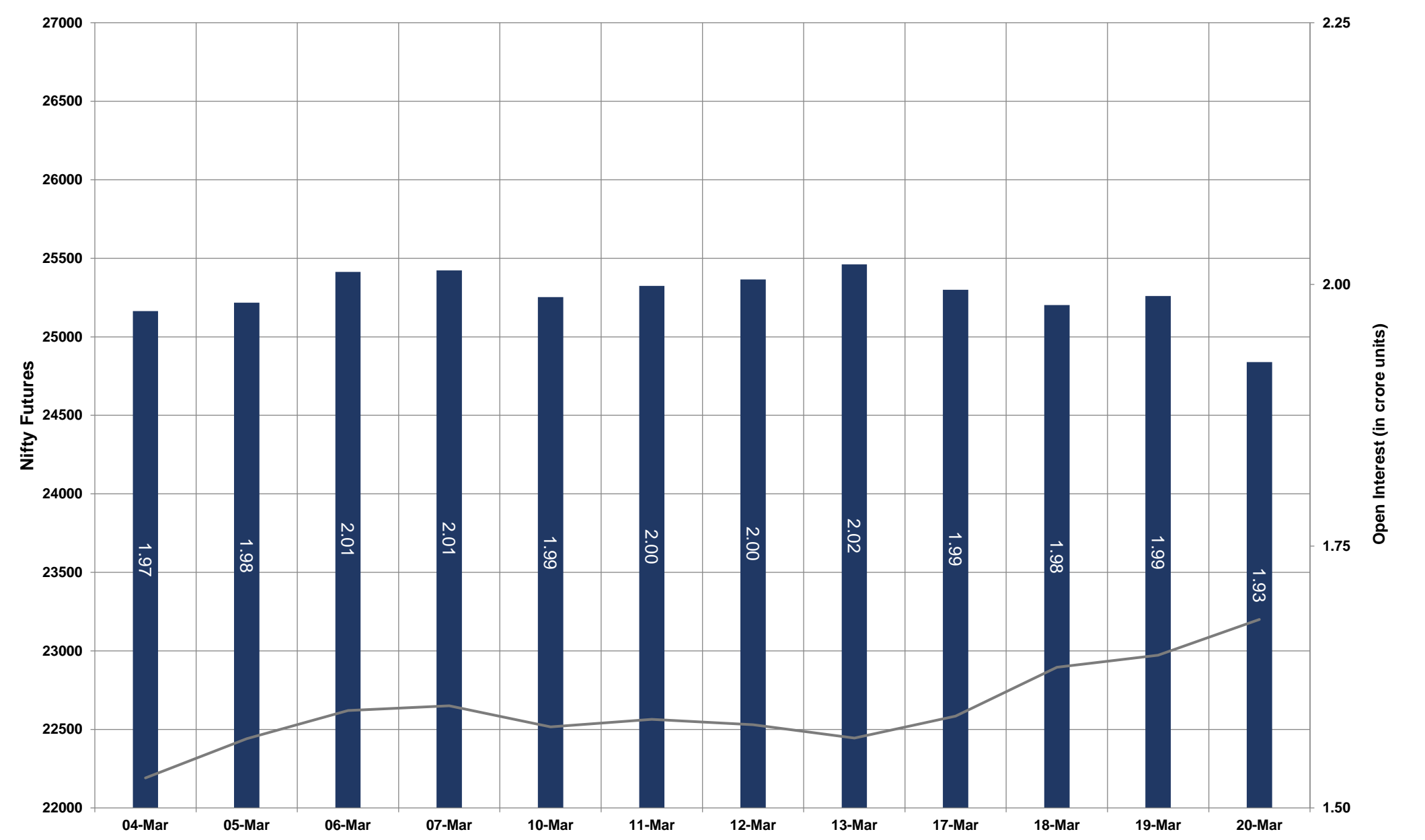


- Nifty Cash = **23190.65 (1.24%)**
- Resistance levels = **23300** and **23450**
- Support levels = **23050** and **22950**

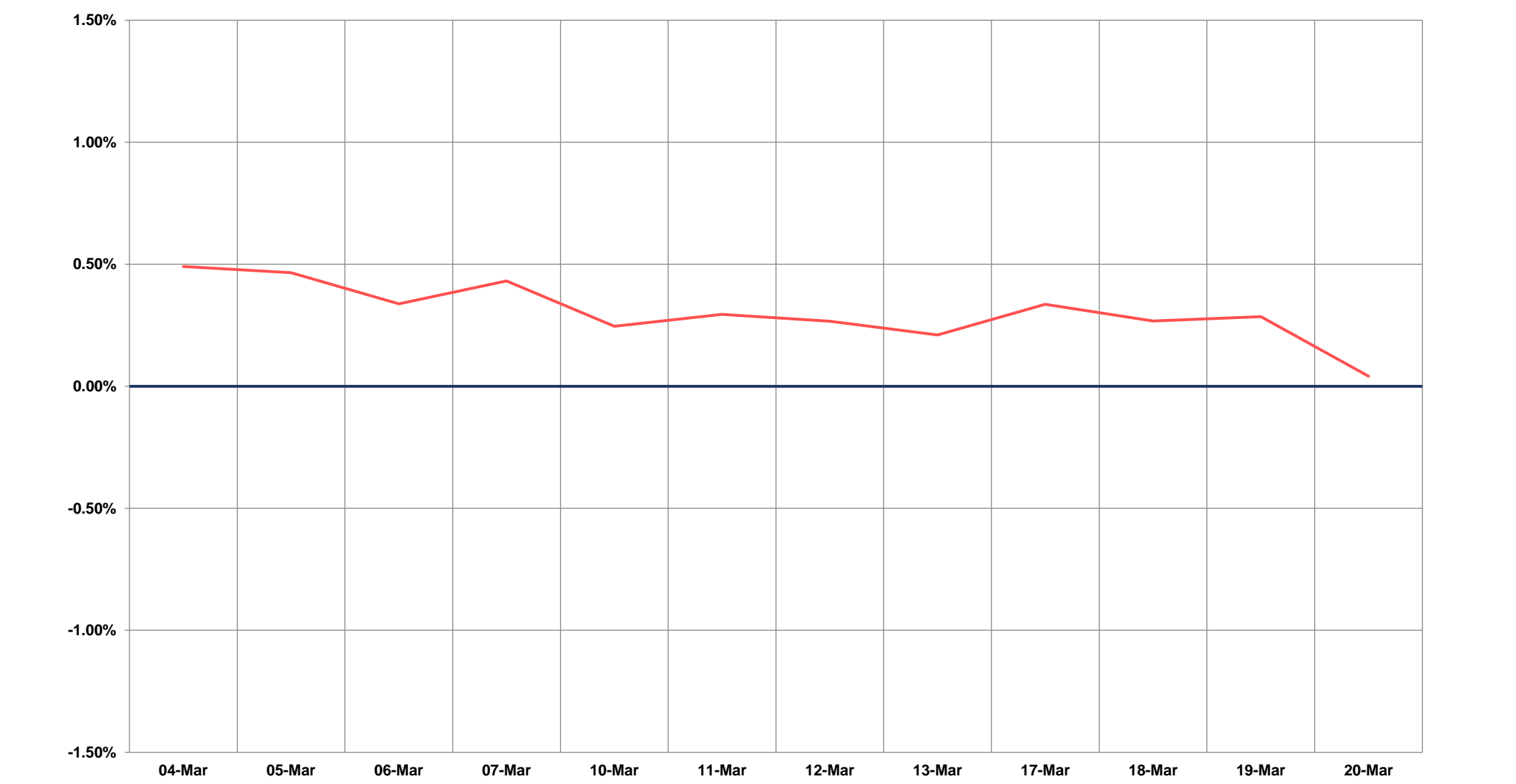
TECHNICAL VIEWS



NIFTY FUTURES



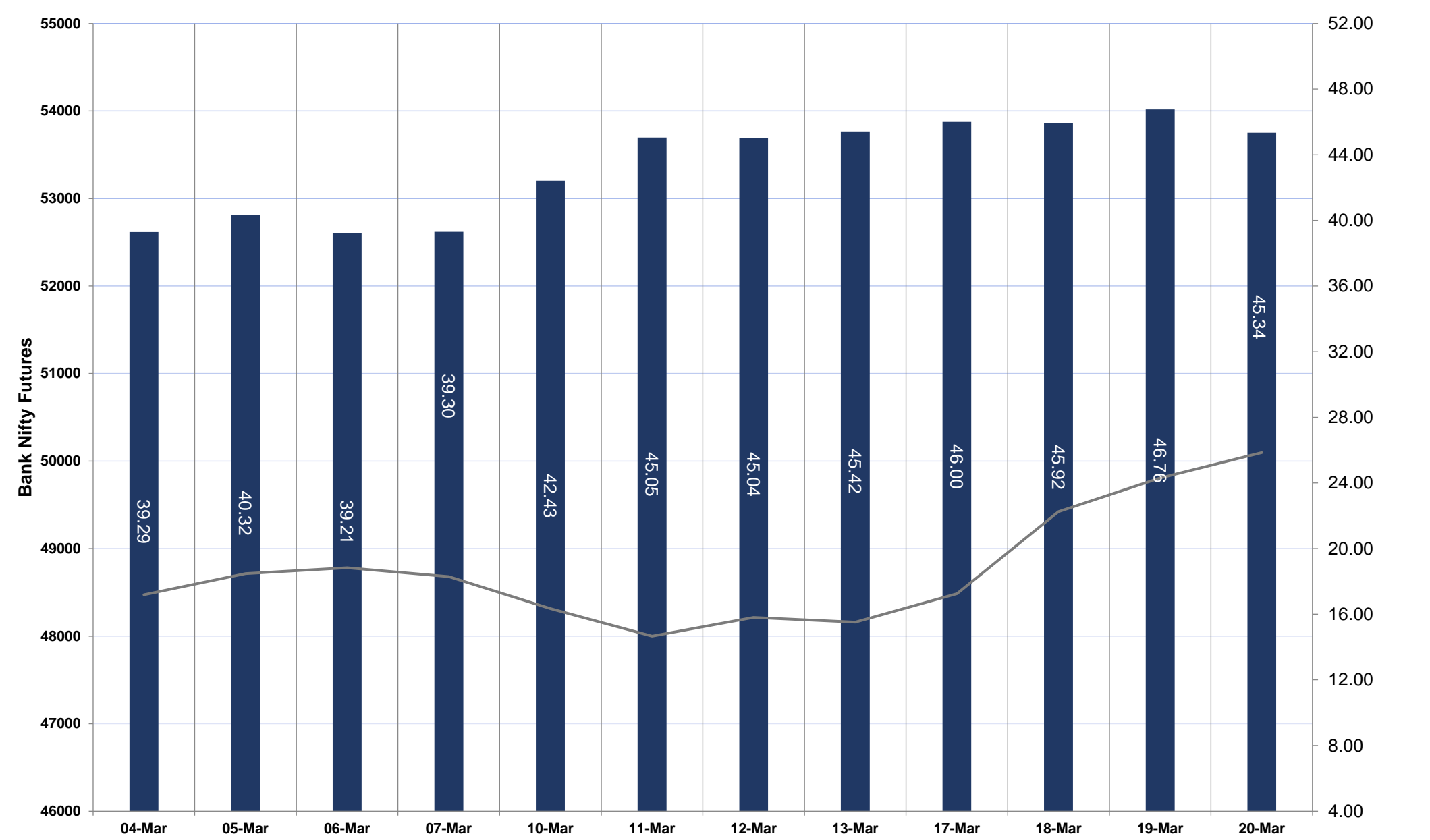
SPREAD: FUTURE & SPOT



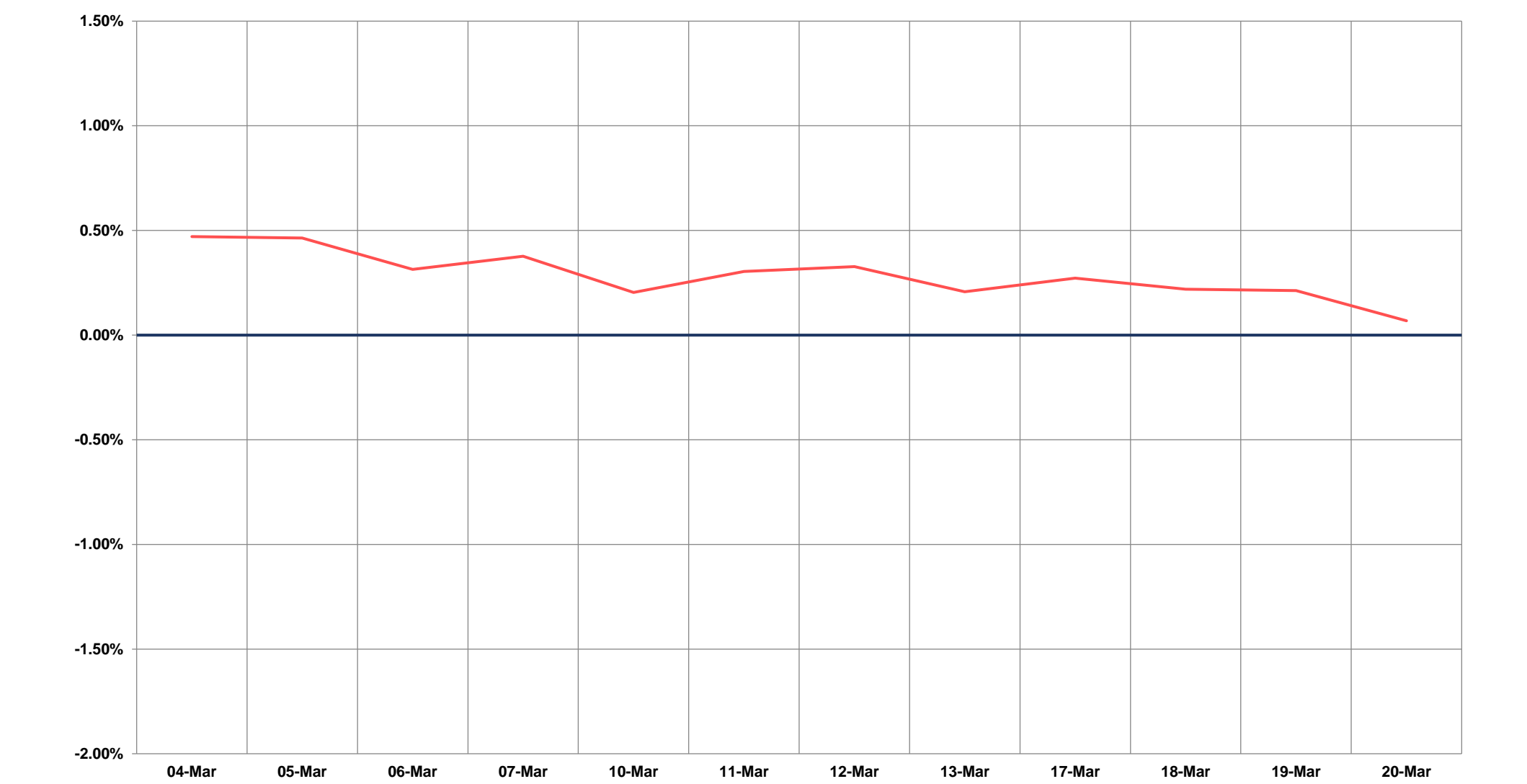
TECHNICAL VIEWS



BANK NIFTY FUTURES



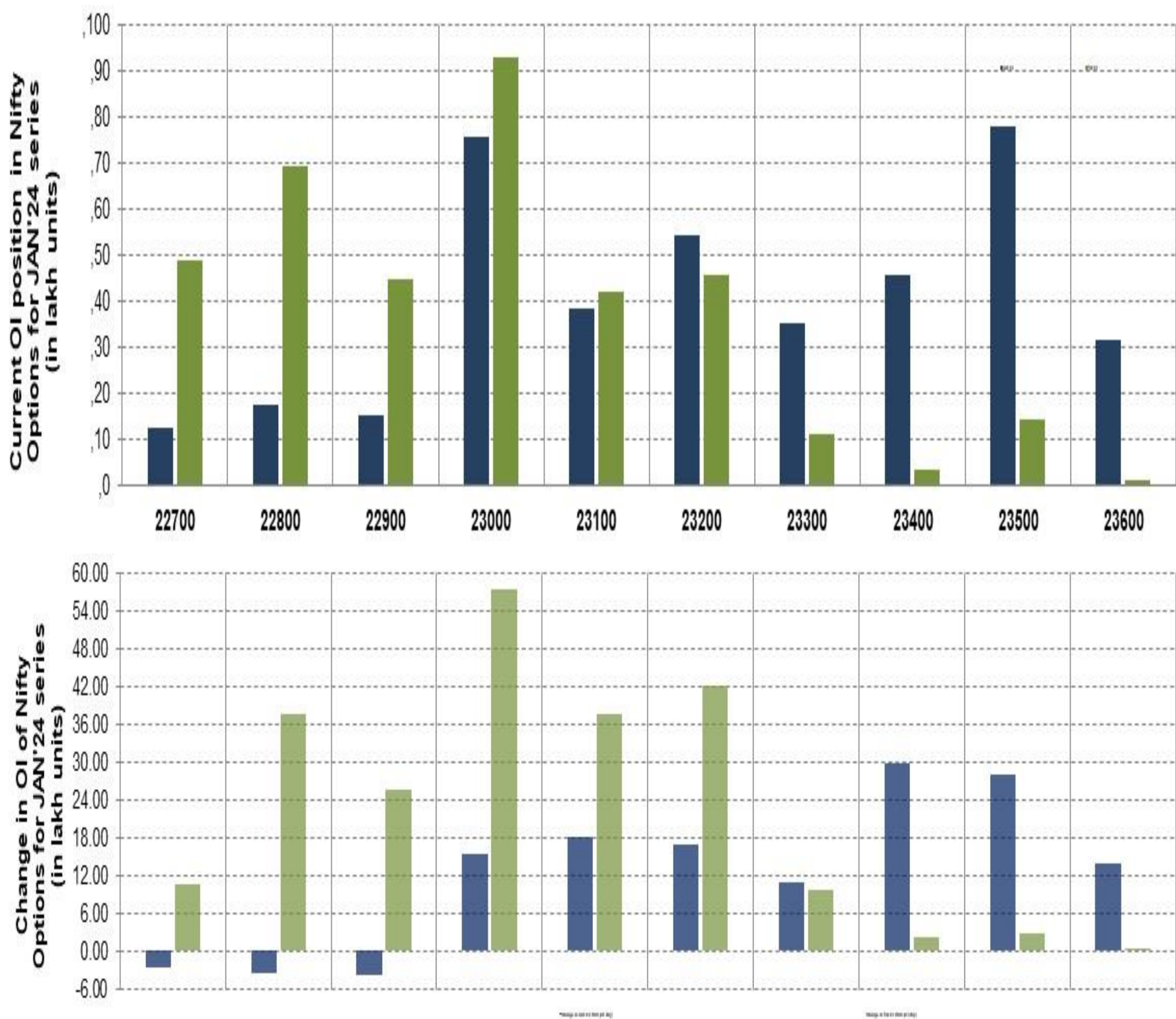
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 2.98 million in Open Interests is **Strike Price of 23400**
- **Most Active Nifty Put** with an addition of 5.73 millions in Open Interests is **Strike Price of 23000**
- **Maximum Open Interest an outstanding** was 7.76 millions for Calls at **Strike Price of 23500**
- **Maximum Open Interest an outstanding** was 9.28 millions for puts at **Strike Price of 23000**

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