



MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

MAR 21, 2025



Local equity markets extended their winning streak for the fifth consecutive session on Friday, with the Nifty gaining 0.69%, driven by broad-based buying across all sectors, with IT stocks rebounding after a slow start. Indices made a cautious start, but soon turned positive and stayed higher throughout the day, supported by strong buying in blue-chip stocks and foreign institutional investors (FIIs) turning net buyers.

Some of the important factors in today's trade:

Markets rally as FIIs turn net buyers: Traders took support as foreign institutional investors (FIIs) turned net buyers. The Foreign institutional investors (FIIs) bought equities worth Rs 3,239.14 crore on March 20.

India's services exports registering healthy growth rates: Some optimism came as Commerce and Industry Minister Piyush Goyal said that India's services exports are registering healthy growth rates and the sector should aspire to reach \$450 billion in exports, overtaking merchandise shipments, in the next financial year.

Trump says India to faces reciprocal tariffs: Traders overlooked U.S. President Donald Trump's statement that India will face reciprocal tariffs, a move likely to hurt India's exports of agricultural and pharmaceutical goods.

Global front: European markets were trading in red, as investors fretted about increasing global economic uncertainties resulting from geopolitical tensions and U.S. President Donald Trump's trade tariffs. Most of the Asian markets ended in red, even after Japan overall consumer price inflation softened in February largely due to government subsidies for energy but the increase in core inflation together with higher wage growth and services inflation put pressure on the Bank of Japan to lift key interest rates.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	76905.51	557.45	0.73
NIFTY	23350.40	159.75	0.69
MIDCAP	41831.57	471.87	1.14
SMLCAP	47296.81	952.22	2.05
BSEFMC	19275.86	95.26	0.50
HEALTHCARE	42122.71	645.18	1.56
AUTO	48850.19	265.39	0.55
POWER	6545.81	69.27	1.07
REALTY	6699.84	62.88	0.95
BSE IT	36138.63	56.16	0.16
BANKEX	58173.22	665.55	1.16
OIL GAS	25095.90	552.55	2.25
METAL	31181.33	-132.88	-0.42
INDIA VIX	12.58	-0.02	-0.16

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	2344	662	31
BSE	2826	1211	125

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	7006	5629	24
NSE CASH	159833	104176	53
NSE F&O	244007	205815	19

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	20.61	3.45	1.39
SENSEX	21.41	3.96	1.19

KEY NUMBERS TRACKER



FII – DII ACTIVITY IN CASH SEGMENT (₹ in Crs)			
FII-DII*	Buy	Sell	Net
DII	18879	22081	(3202)
FII	49893	42422	7470

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)			
FII	Buy	Sell	Net
Index Futures	5605.73	3186.70	2419
Index Options	1045911.07	1060099.69	(14189)
Stock Futures	42578.84	41391.03	1188
Stock Options	118780.76	119485.86	(705)

PUT-CALL RATIO		
Index	Current	Previous
NIFTY	1.15	1.15
BANK NIFTY	1.26	1.18

DOLLAR INDEX			
Dollar Index	Current	Previous	% Change
DXY	104.00	103.79	0.20

10-YEARS G-SEC YIELD			
Country	Current	Previous	% Change
INDIA	6.625	6.638	-0.20
USA	4.206	4.233	-0.64

KEY COMMODITIES TRACKER (in \$)			
Commodity	Current	Change Points	% Change
Gold	3032.70	-13.58	-0.45
Silver	33.10	-0.41	-1.24
Crude-Oil	67.90	-0.17	-0.25
Brent-Crude	71.78	-0.22	-0.31

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES

Expiry		Close	Change Points	% Change
26 MAR-25	USD-INR	86.01	-0.37	-0.42
26 MAR-25	EUR-INR	93.29	-0.38	-0.40
26 MAR-25	GBP-INR	111.35	-0.53	-0.48
26 MAR-25	JPY- INR	57.70	-0.43	-0.73

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS

Index	Close	S2	S1	Pivot	R1	R2
NIFTY	23350	23025	23188	23295	23458	23565
SENSEX	76906	75734	76320	76681	77267	77628
NIFTY FUTURES	23380	23064	23222	23330	23488	23596
BANK NIFTY	50594	49606	50100	50386	50880	51166
CNX IT	36703	35111	35907	36470	37266	37830
CNX MIDCAP	51851	50695	51273	51589	52167	52484
CNX SMALLCAP	16185	15716	15950	16077	16311	16438
INDIA VIX	12.58	9.90	11.24	12.04	13.38	14.18

INDEX TREND ANALYSIS

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

SECURITIES BAN IN F&O TRADES FOR 24-03-2025

HINDCOPPER, INDUSINDBK, POLYCAB	
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TECHNICAL VIEWS



NIFTY

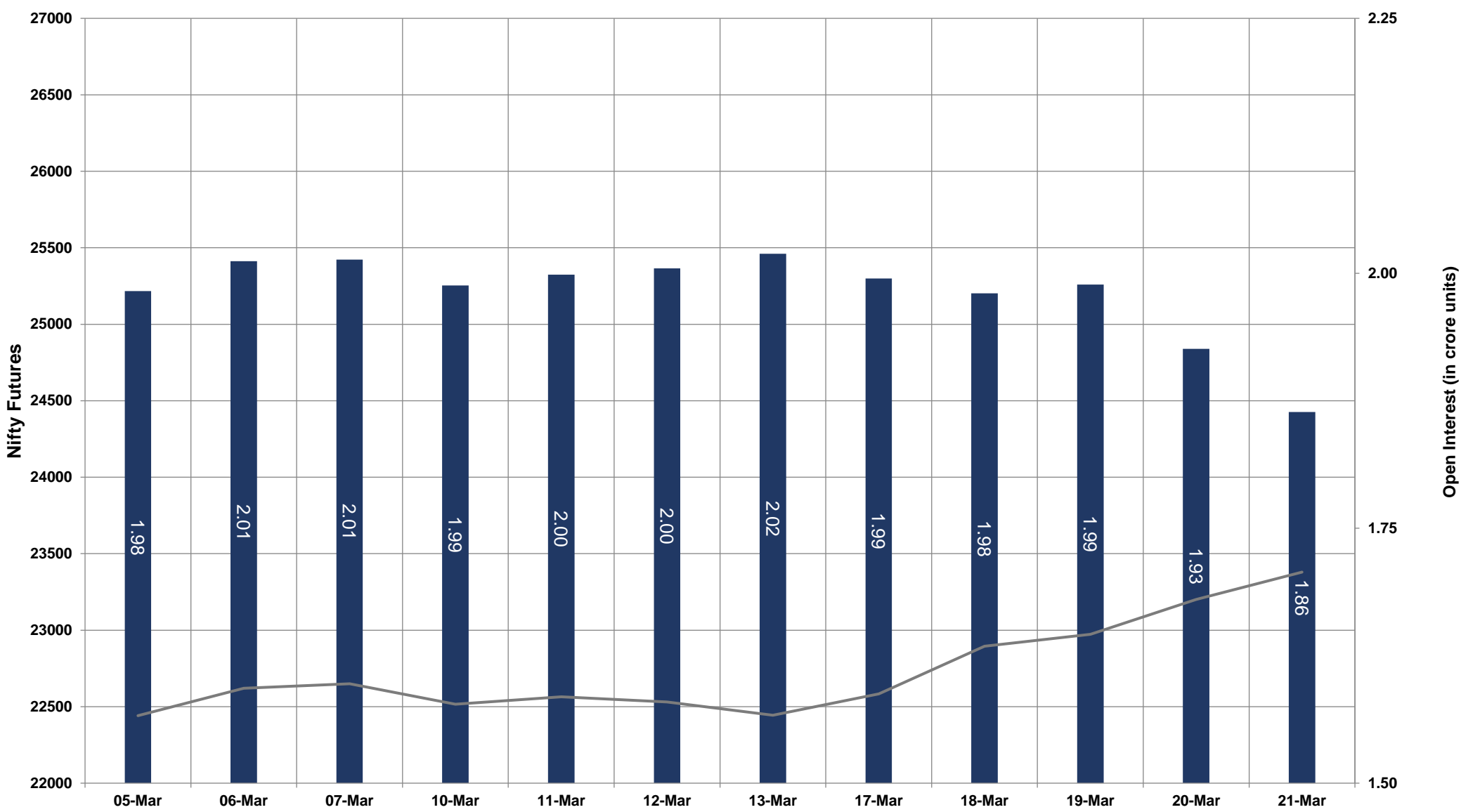


- Nifty Cash = **23350.40 (0.69%)**
- Resistance levels = **23450** and **23580**
- Support levels = **23150** and **23050**

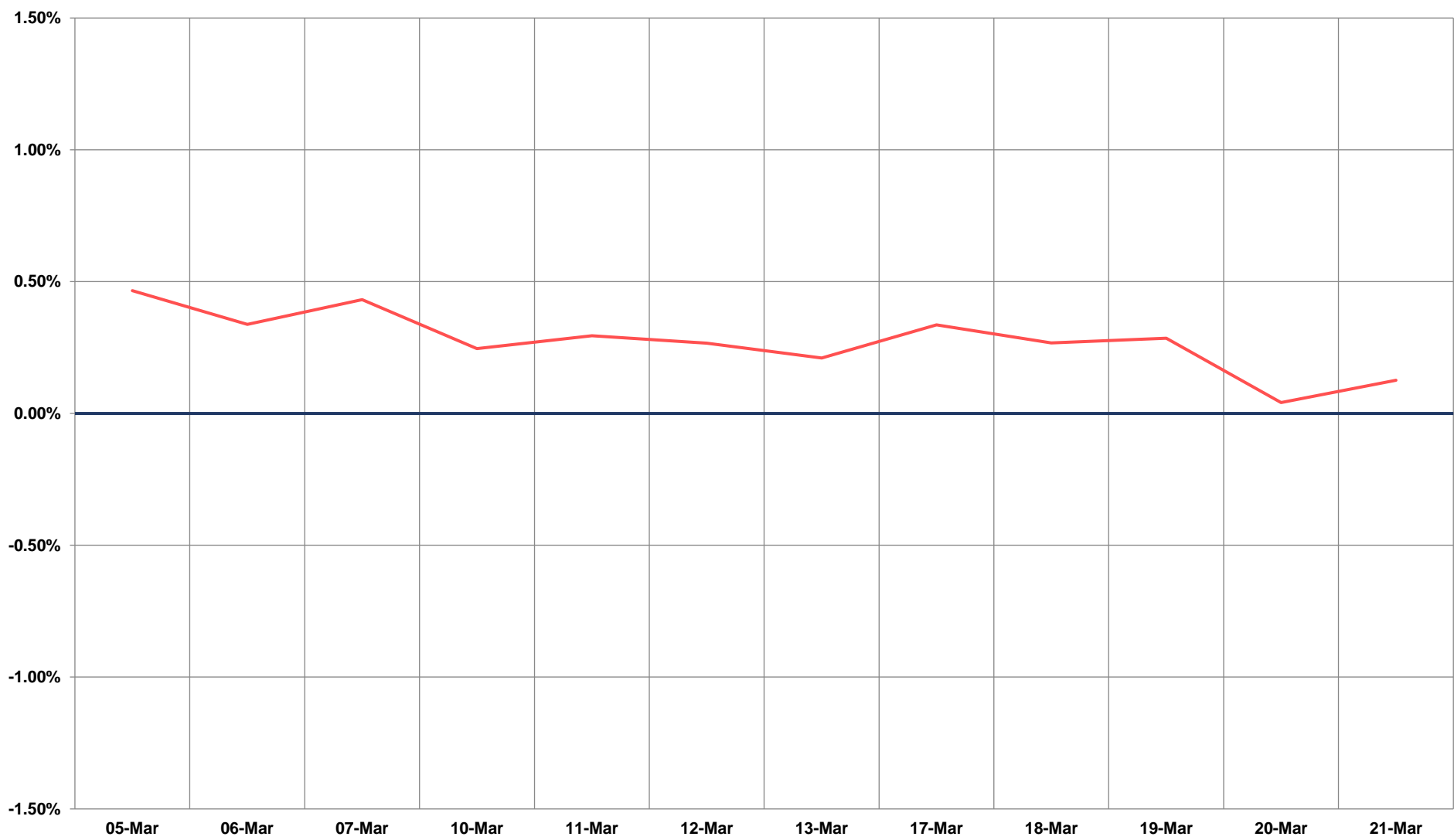
TECHNICAL VIEWS



NIFTY FUTURES



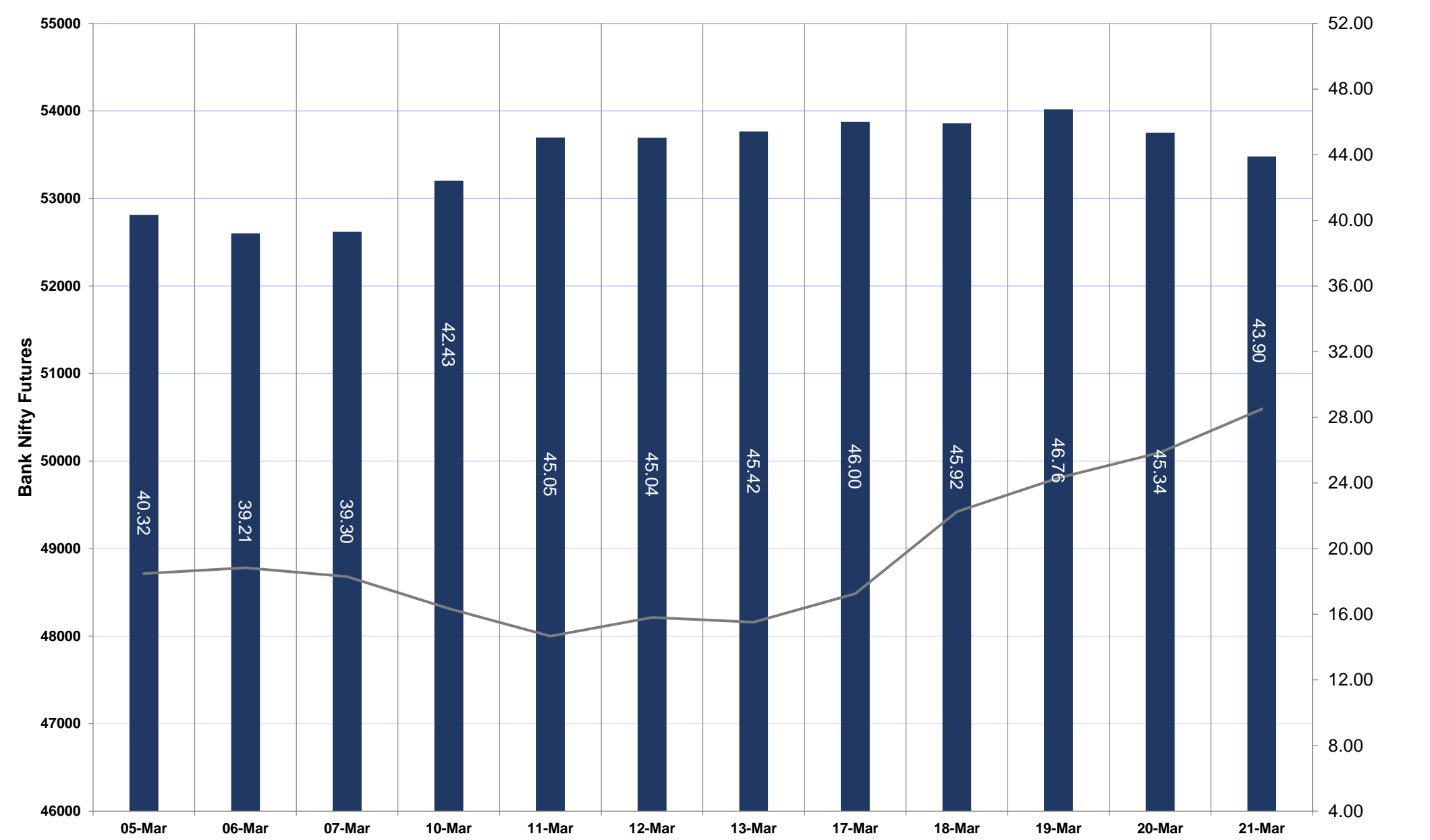
SPREAD: FUTURE & SPOT



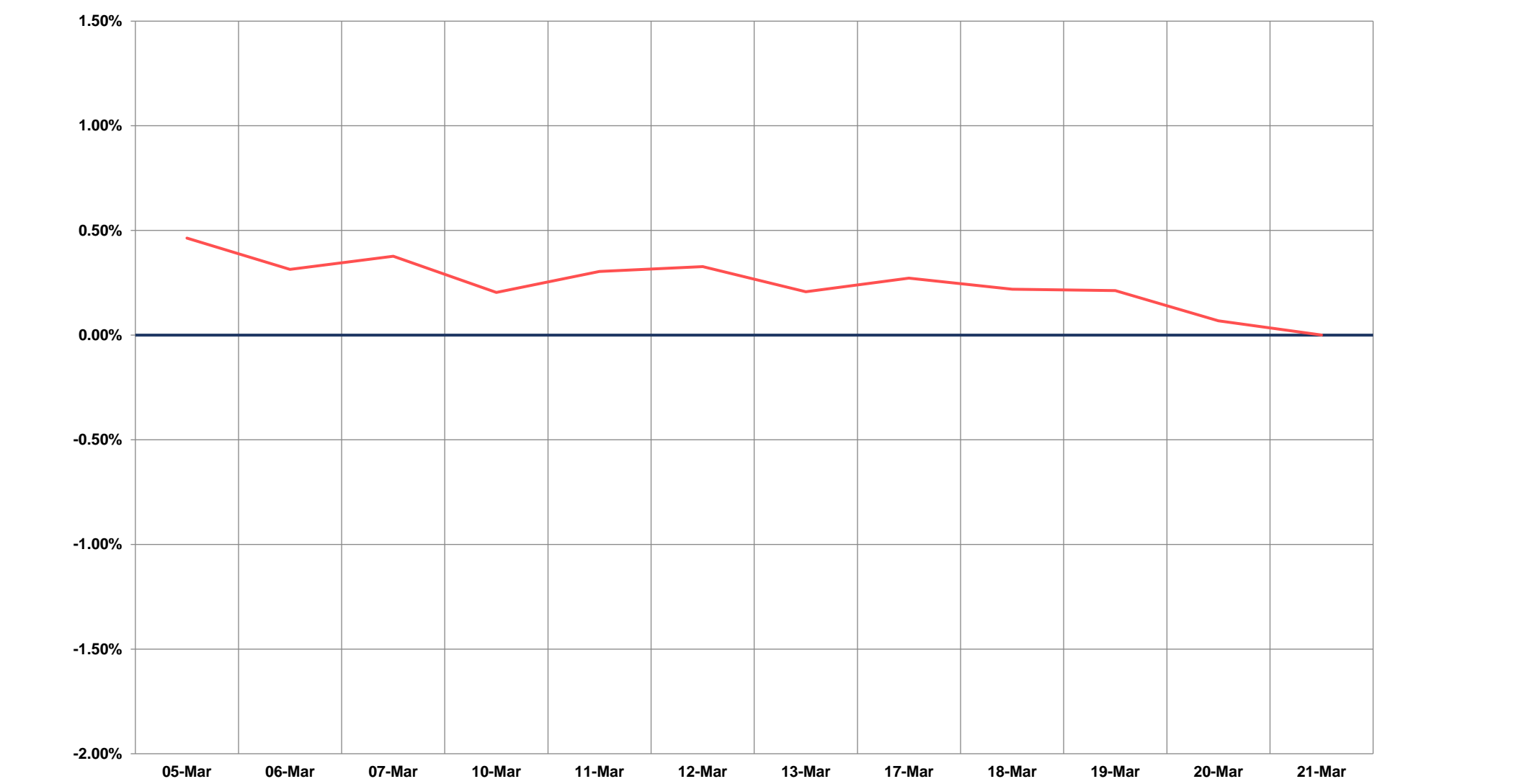
TECHNICAL VIEWS



BANK NIFTY FUTURES



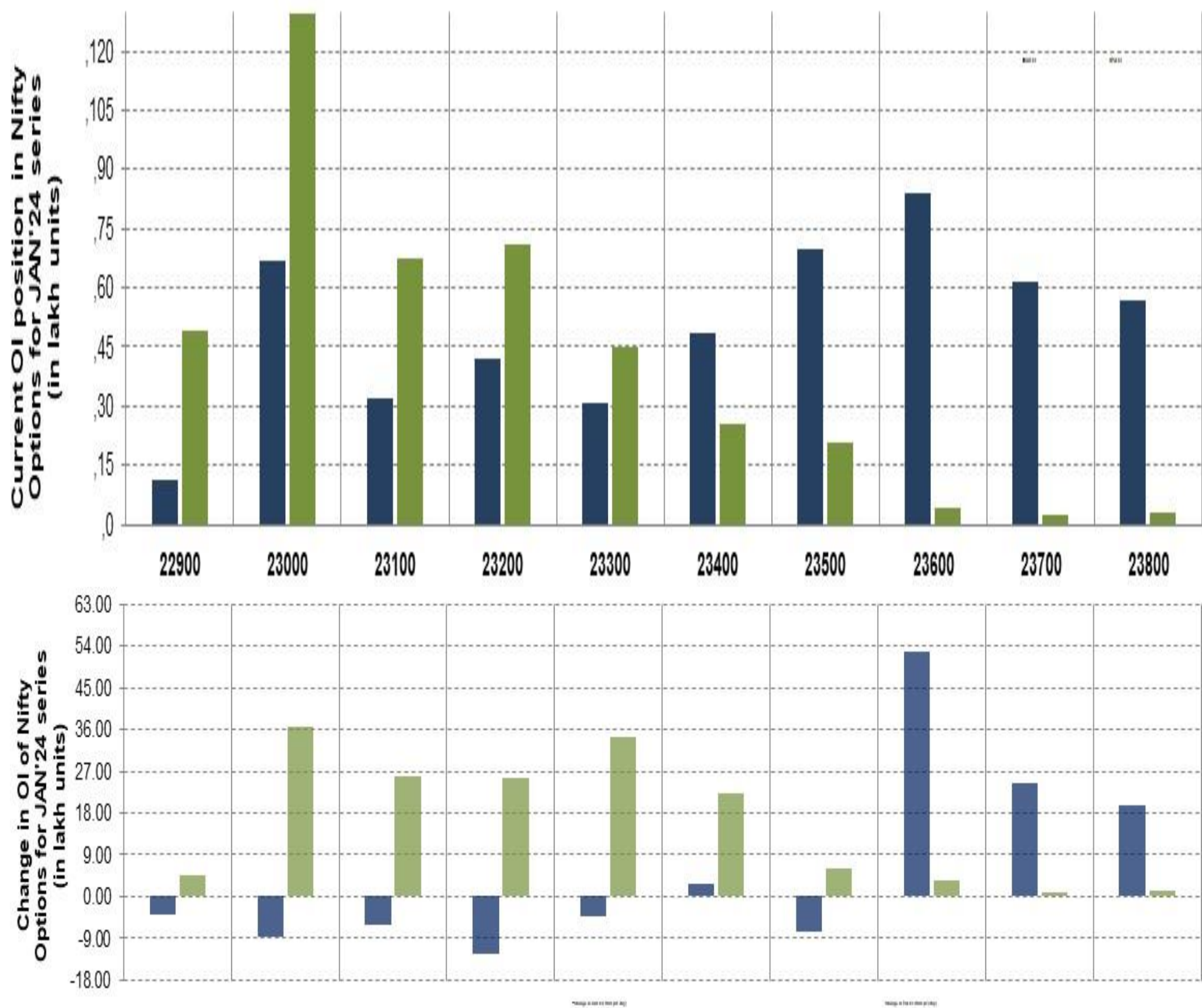
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 5.28 million in Open Interests is **Strike Price of 23600**
- **Most Active Nifty Put** with an addition of 3.65 millions in Open Interests is **Strike Price of 23000**
- **Maximum Open Interest an outstanding** was 8.42 millions for Calls at **Strike Price of 23600**
- **Maximum Open Interest an outstanding** was 12.93 millions for puts at **Strike Price of 23000**

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