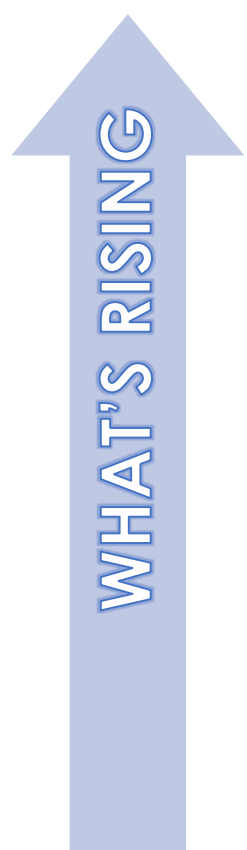


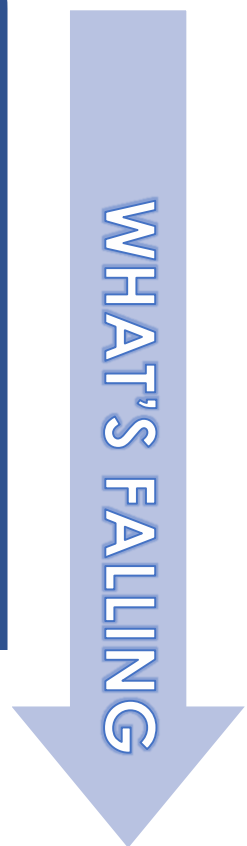


MORNING MANTRA



BULLS

BEARS



Daily Derivatives & Market Report

MAR 25, 2025



Indian equity markets continued their bullish run on Monday, with both Sensex and Nifty closing near the day's high points, supported by strong foreign inflows and broad-based sectoral gains. Markets made a positive start and extended their gains throughout the session, after U.S. President Donald Trump indicated he'd retain 'flexibility' when it comes to a reciprocal tariff plan expected on April 2.

Some of the important factors in today's trade:

Fresh foreign fund inflows: Traders found some support amid fresh foreign fund inflows. Foreign Institutional Investors (FIIs) bought equities worth Rs 7,470.36 crore on Friday, according to exchange data.

India's forex reserves hit \$654.27 billion: Sentiments were upbeat, as the data released by Reserve Bank of India showed that India's forex reserves increased to \$654.27 billion in the week ending March 14, 2025, up by \$0.305 billion.

India's private sector growth slows in March: The street overlooked the HSBC flash Purchasing Managers' Index (PMI) survey stating that private sector output in India increased at a slower pace in March as compared to the previous month, amid a quicker expansion in manufacturing activity and a softer increase in services activity.

Global front: European markets were trading in green, ahead of business activity surveys from the region due later in the day. Asian markets ended mixed, as the manufacturing sector in Japan continued to contract in March, with a manufacturing PMI score of 48.3. That's down from 49.0 in February, and it moved further beneath the boom-or-bust line of 50 that separates expansion from contraction.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	78017.19	32.80	0.04
NIFTY	23668.65	10.30	0.04
MIDCAP	41904.81	-478.14	-1.13
SMLCAP	47070.40	-781.12	-1.63
BSEFMC	19304.20	-68.92	-0.36
HEALTHCARE	41995.81	-318.23	-0.75
AUTO	48743.75	-478.77	-0.97
POWER	6615.20	-81.55	-1.22
REALTY	6698.10	-102.61	-1.51
BSE IT	37040.19	427.50	1.17
BANKEX	59580.13	-64.61	-0.11
OIL GAS	25109.81	-332.62	-1.31
METAL	30938.39	-415.78	-1.33
INDIA VIX	13.63	-0.07	-0.51

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	674	2258	66
BSE	1085	2983	109

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	6682	6703	(0)
NSE CASH	108836	108223	1
NSE F&O	414989	394385	5

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	21.04	3.52	1.36
SENSEX	21.74	4.02	1.17

KEY NUMBERS TRACKER



FII – DII ACTIVITY IN CASH SEGMENT (₹ in Crs)			
FII-DII*	Buy	Sell	Net
DII	11693	14462	(2769)
FII	19066	13695	5372

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)			
FII	Buy	Sell	Net
Index Futures	8984.29	8064.53	920
Index Options	1616366.21	1590600.15	25766
Stock Futures	126721.93	124878.71	1843
Stock Options	103666.46	104578.08	(912)

PUT-CALL RATIO		
Index	Current	Previous
NIFTY	1.05	1.21
BANK NIFTY	1.04	1.23

DOLLAR INDEX			
Dollar Index	Current	Previous	% Change
DXY	104.04	104.31	-0.25

10-YEARS G-SEC YIELD			
Country	Current	Previous	% Change
INDIA	6.638	6.628	0.15
USA	4.360	4.331	0.67

KEY COMMODITIES TRACKER (in \$)			
Commodity	Current	Change Points	% Change
Gold	3017.03	7.27	0.24
Silver	33.41	0.49	1.49
Crude-Oil	69.59	0.48	0.69
Brent-Crude	73.49	0.49	0.67

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES

Expiry	Close	Change Points	% Change
26 MAR-25 USD-INR	85.70	0.09	0.10
26 MAR-25 EUR-INR	92.79	-0.13	-0.14
26 MAR-25 GBP-INR	110.95	-0.07	-0.06
26 MAR-25 JPY- INR	57.00	-0.25	-0.43

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS

Index	Close	S2	S1	Pivot	R1	R2
NIFTY	23669	23445	23557	23713	23825	23981
SENSEX	78017	77172	77595	78168	78591	79164
NIFTY FUTURES	23705	23519	23612	23753	23846	23987
BANK NIFTY	51608	51066	51337	51701	51971	52335
CNX IT	37707	37062	37384	37729	38051	38396
CNX MIDCAP	51970	50992	51481	52204	52693	53416
CNX SMALLCAP	16109	15773	15941	16230	16398	16688
INDIA VIX	13.64	12.88	13.26	13.87	14.25	14.86

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

SECURITIES BAN IN F&O TRADES FOR 26-03-2025
--

INDUSINDBK

TECHNICAL VIEWS



NIFTY

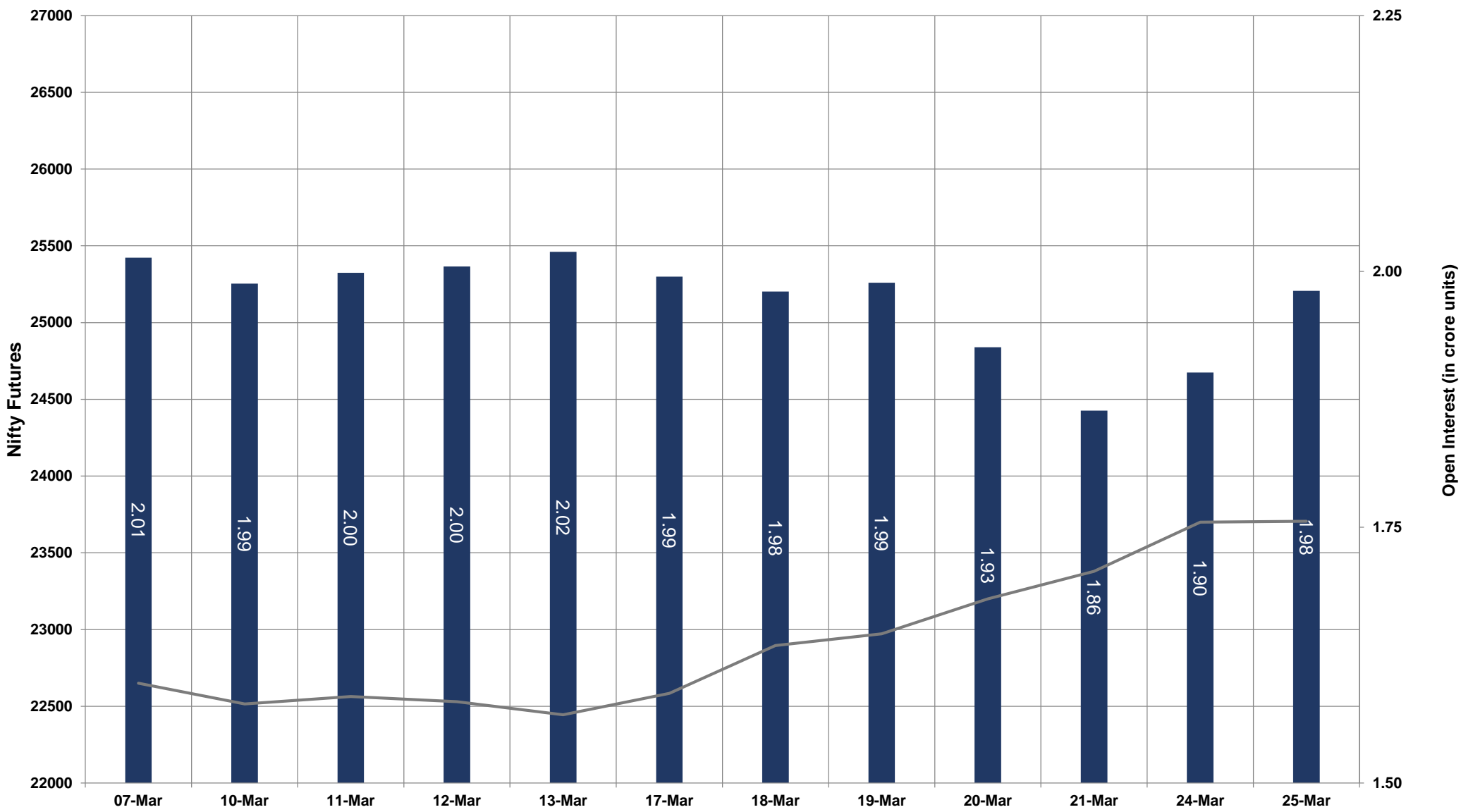


- Nifty Cash = **23668.65 (0.04%)**
- Resistance levels = **23780** and **23850**
- Support levels = **23550** and **23400**

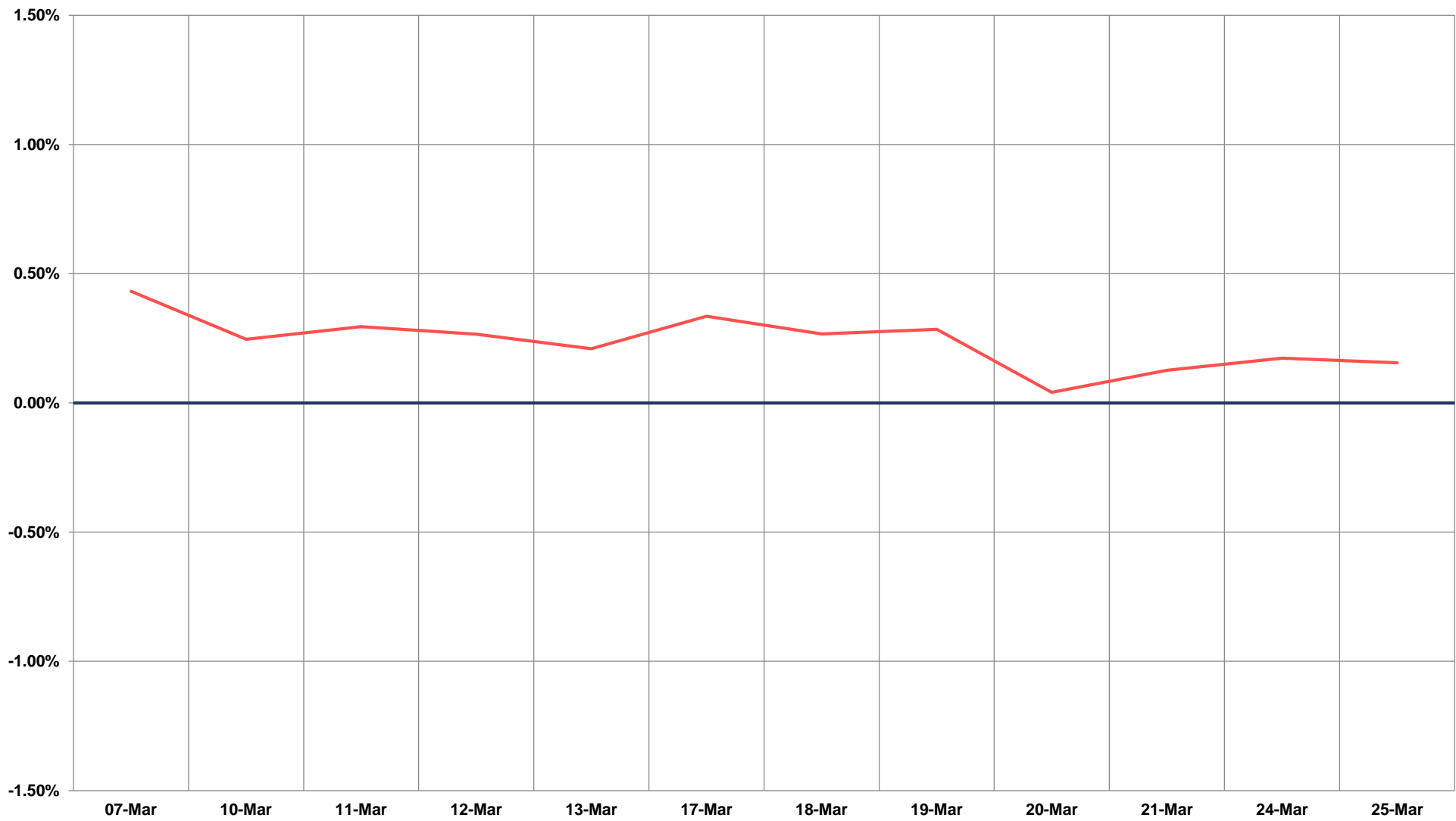
TECHNICAL VIEWS



NIFTY FUTURES



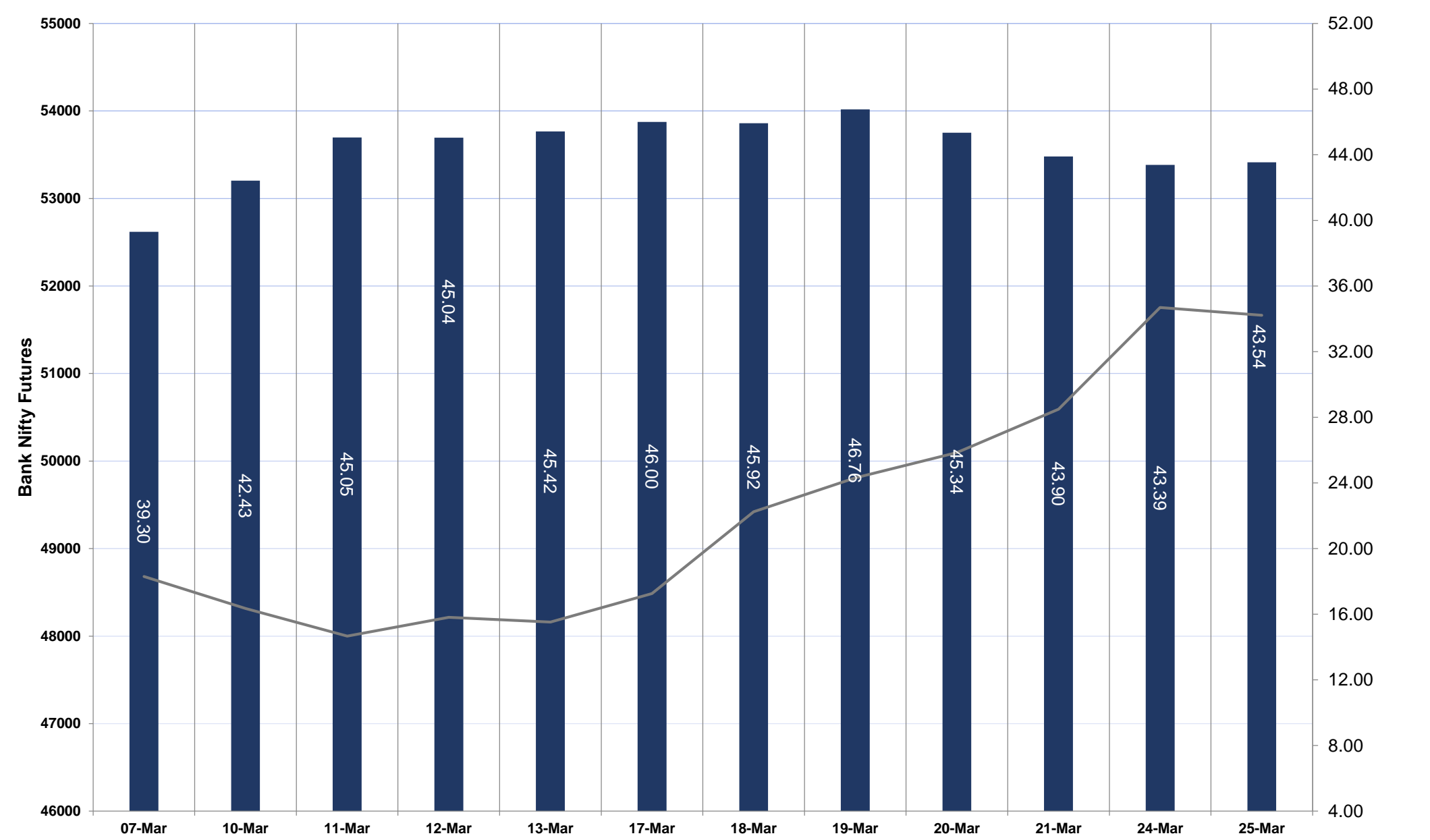
SPREAD: FUTURE & SPOT



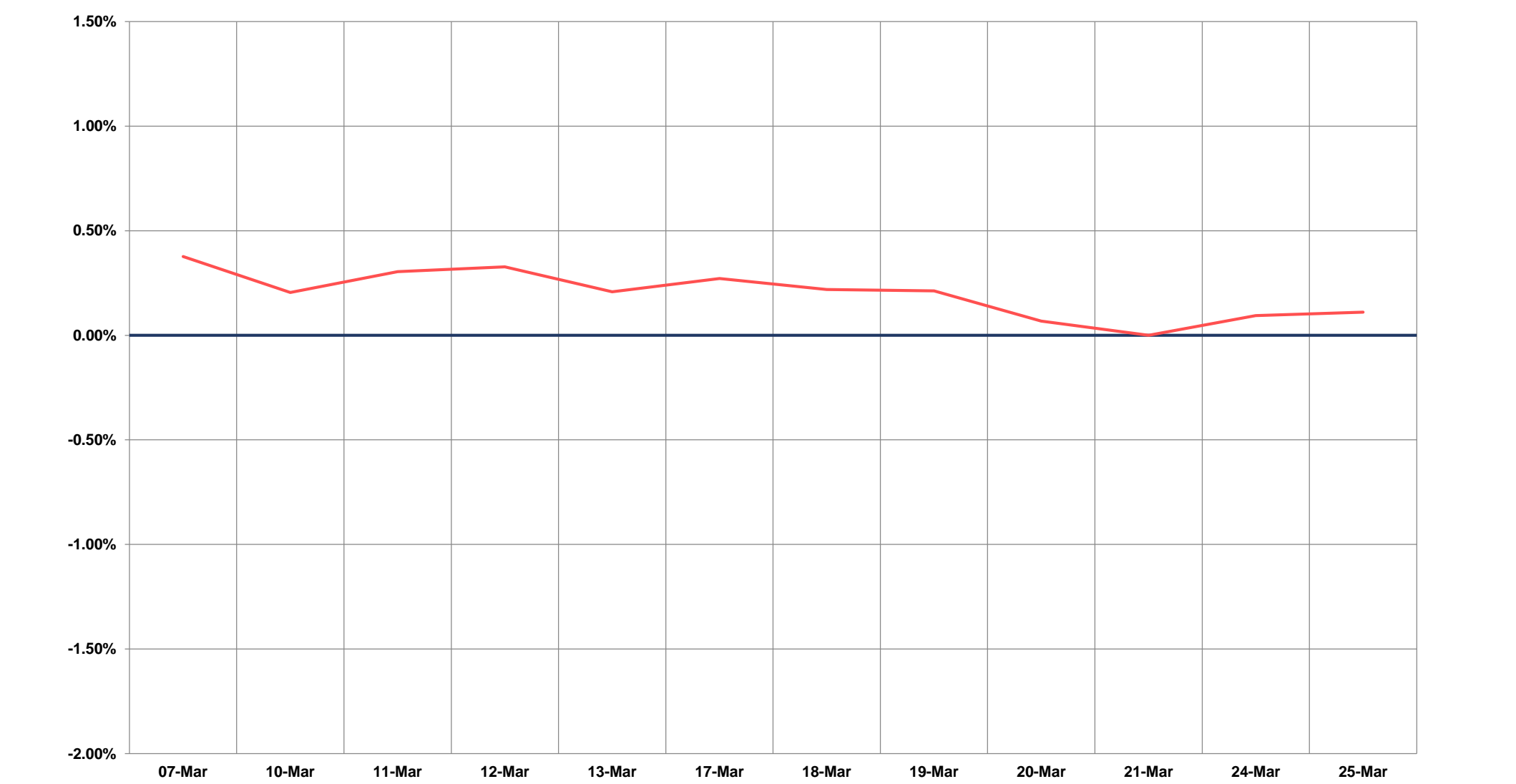
TECHNICAL VIEWS



BANK NIFTY FUTURES



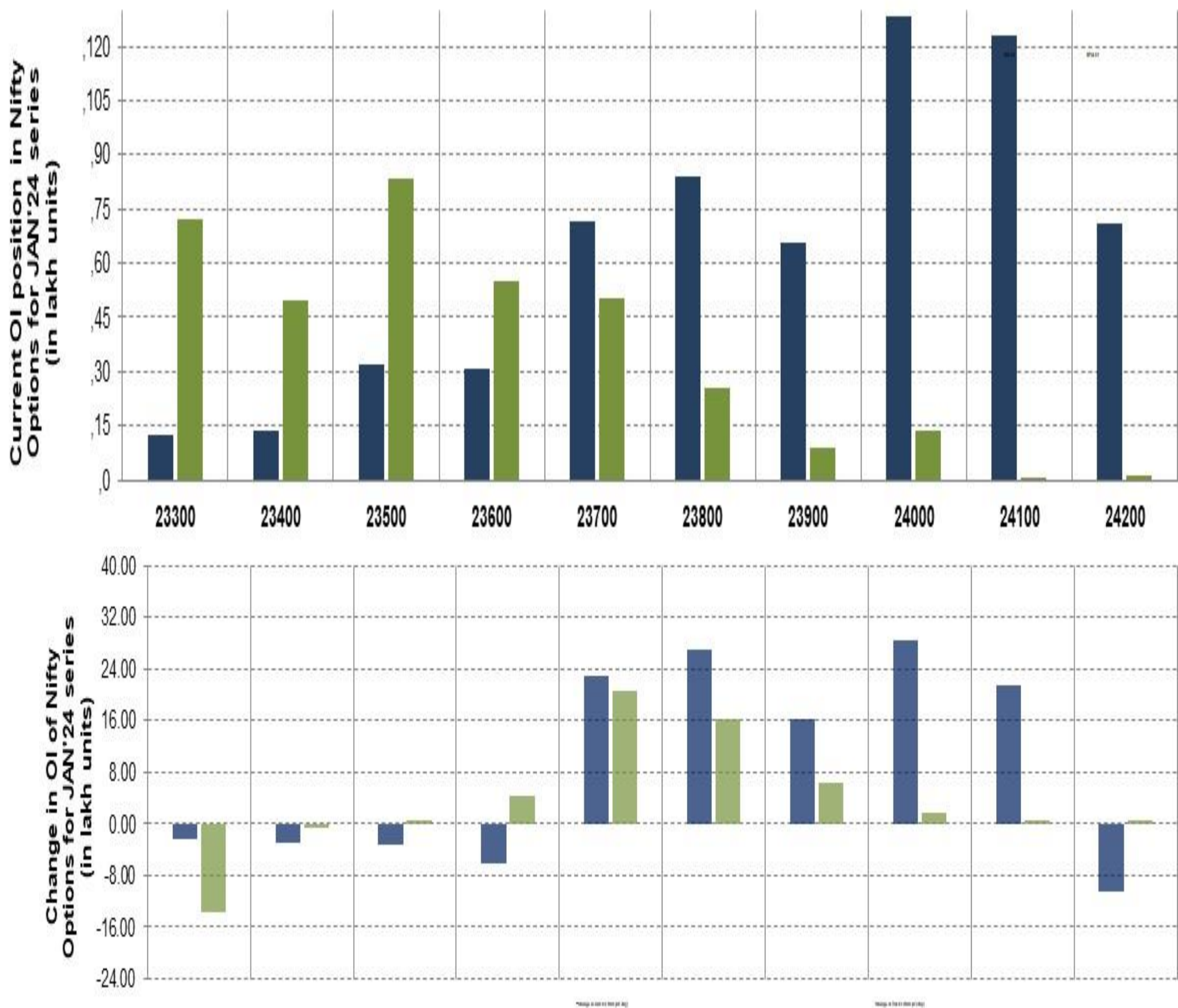
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 2.85 million in Open Interests is **Strike Price of 24000**
- **Most Active Nifty Put** with an addition of 2.06 millions in Open Interests is **Strike Price of 23700**
- **Maximum Open Interest an outstanding** was 12.83 millions for Calls at **Strike Price of 24000**
- **Maximum Open Interest an outstanding** was 8.34 millions for puts at **Strike Price of 23500**

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.