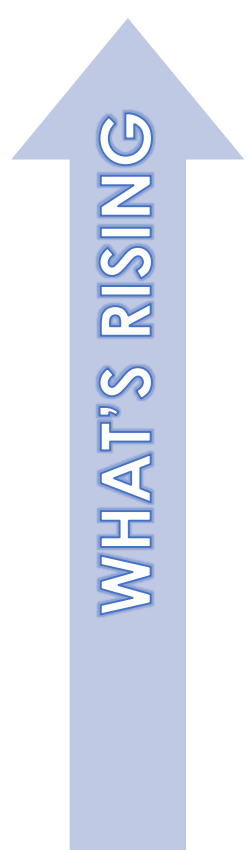


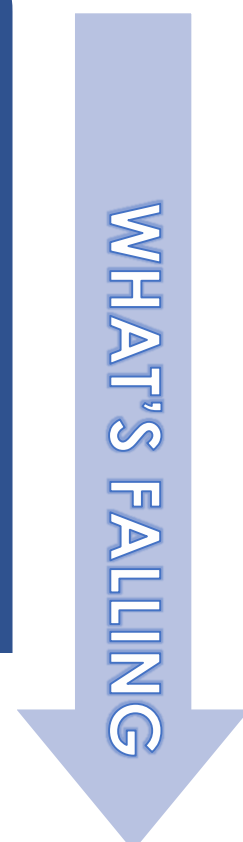


# MORNING MANTRA



BULLS

BEARS



Daily Derivatives & Market Report

APR 08, 2025



Local equity markets rebounded sharply on Tuesday, with the Nifty crossing the 22,500 mark and the Sensex surging over 1,050 points, as investors were awaiting the Reserve Bank of India's (RBI) Monetary Policy Committee decision scheduled for tomorrow, as well as upcoming fourth-quarter earnings from India Inc. Indices made a gap-up opening and continued to trade with notable gains till the end, supported by a broad-based rally across sectors.

Some of the important factors in trade:

**Govt stepping up efforts to help exporters:** Traders took support as the commerce ministry is stepping up efforts to help exporters explore new markets to push outbound shipments while also setting up a working group to monitor possible surge in imports from countries like China to tackle the impact of sweeping tariffs announced by the US.

**Jaishankar, Rubio hold talks on BTA:** Traders were getting some encouragement as Subrahmanyam Jaishankar, external affairs minister, said he spoke to United States Secretary of State Marco Rubio on the early conclusion of the Bilateral Trade Agreement (BTA).

**FII's extends selling streak:** Traders overlooked the exchange data showed the foreign institutional investors (FIIs) continued their selling for the sixth consecutive session on April 7, as they sold equities worth Rs 9,040.01 crore.

**Global front:** European markets were trading in the green as sentiment was positive amid expectations the US government will soften its tariff stance a bit. Asian markets ended mixed after US Treasury Secretary Scott Bessent said Japan is likely to be prioritized in trade talks with the Trump administration.

# MARKET SELFIE



## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	74227.08	1089.18	1.49
NIFTY	22535.85	374.25	1.69
MIDCAP	39837.44	729.48	1.87
SMLCAP	44932.42	958.06	2.18
BSEFMC	19650.68	388.24	2.02
HEALTHCARE	40041.38	761.07	1.94
AUTO	45115.63	727.06	1.64
POWER	6376.52	45.00	0.71
REALTY	6162.25	146.69	2.44
BSE IT	32677.63	567.51	1.77
BANKEX	57988.55	828.48	1.45
OIL GAS	24156.41	606.82	2.58
METAL	27006.42	326.26	1.22
INDIA VIX	20.44	-2.35	-10.31

## ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	2592	347	22
BSE	3093	868	122

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	5127	8462	(39)
NSE CASH	94248	124335	(24)
NSE F&O	209341	310384	(33)

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	20.48	3.33	1.37
SENSEX	20.69	3.82	1.30

# KEY NUMBERS TRACKER



FII – DII ACTIVITY IN CASH SEGMENT (₹ in Crs)			
FII-DII*	Buy	Sell	Net
DII	14364	11267	3097
FII	13688	18682	(4994)

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)			
FII	Buy	Sell	Net
Index Futures	4744.63	5075.79	(331)
Index Options	1751534.02	1685406.44	66128
Stock Futures	21737.82	22105.05	(367)
Stock Options	70350.59	71101.24	(751)

PUT-CALL RATIO		
Index	Current	Previous
NIFTY	0.83	0.74
BANK NIFTY	0.81	0.82

DOLLAR INDEX			
Dollar Index	Current	Previous	% Change
DXY	103.31	103.46	-0.15

10-YEARS G-SEC YIELD			
Country	Current	Previous	% Change
INDIA	6.475	6.486	-0.17
USA	4.216	4.157	1.47

KEY COMMODITIES TRACKER (in \$)			
Commodity	Current	Change Points	% Change
Gold	3005.43	24.13	0.81
Silver	30.20	0.19	0.61
Crude-Oil	60.96	0.26	0.43
Brent-Crude	64.44	0.23	0.36

# CURRENCY FUTURES & INDEX TRENDS TRACKER



## CURRENCY FUTURES

Expiry	Close	Change Points	% Change
28 APR-25 USD-INR	86.41	0.42	0.48
28 APR-25 EUR-INR	94.55	0.26	0.27
28 APR-25 GBP-INR	110.44	0.12	0.10
28 APR-25 JPY- INR	58.99	0.11	0.19

## INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS

Index	Close	S2	S1	Pivot	R1	R2
NIFTY	22536	22075	22305	22501	22732	22928
SENSEX	74227	72736	73482	74170	74916	75605
NIFTY FUTURES	22630	22168	22399	22572	22803	22976
BANK NIFTY	50511	49682	50097	50445	50860	51208
CNX IT	33244	32398	32821	33282	33705	34166
CNX MIDCAP	49838	48713	49276	49757	50319	50800
CNX SMALLCAP	15389	15045	15217	15390	15562	15735
INDIA VIX	20.44	17.46	18.95	20.87	22.36	24.28

## INDEX TREND ANALYSIS

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

## SECURITIES BAN IN F&O TRADES FOR 09-04-2025

**BSOFT, HINDCOPPER, MANAPPURAM**



# TECHNICAL VIEWS



## NIFTY

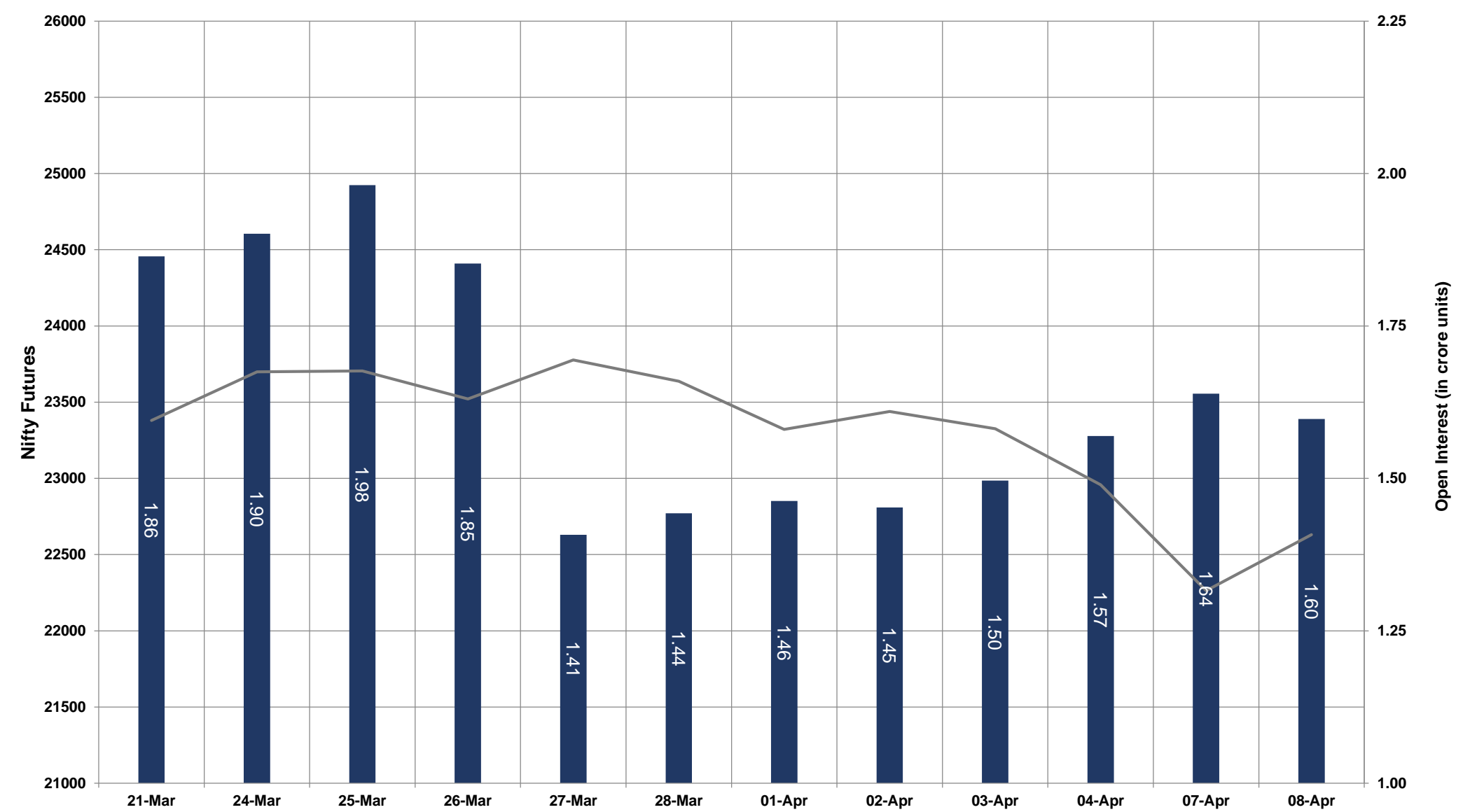


- Nifty Cash = **22535.85 (1.69%)**
- Resistance levels = **22650** and **22900**
- Support levels = **22250** and **22000**

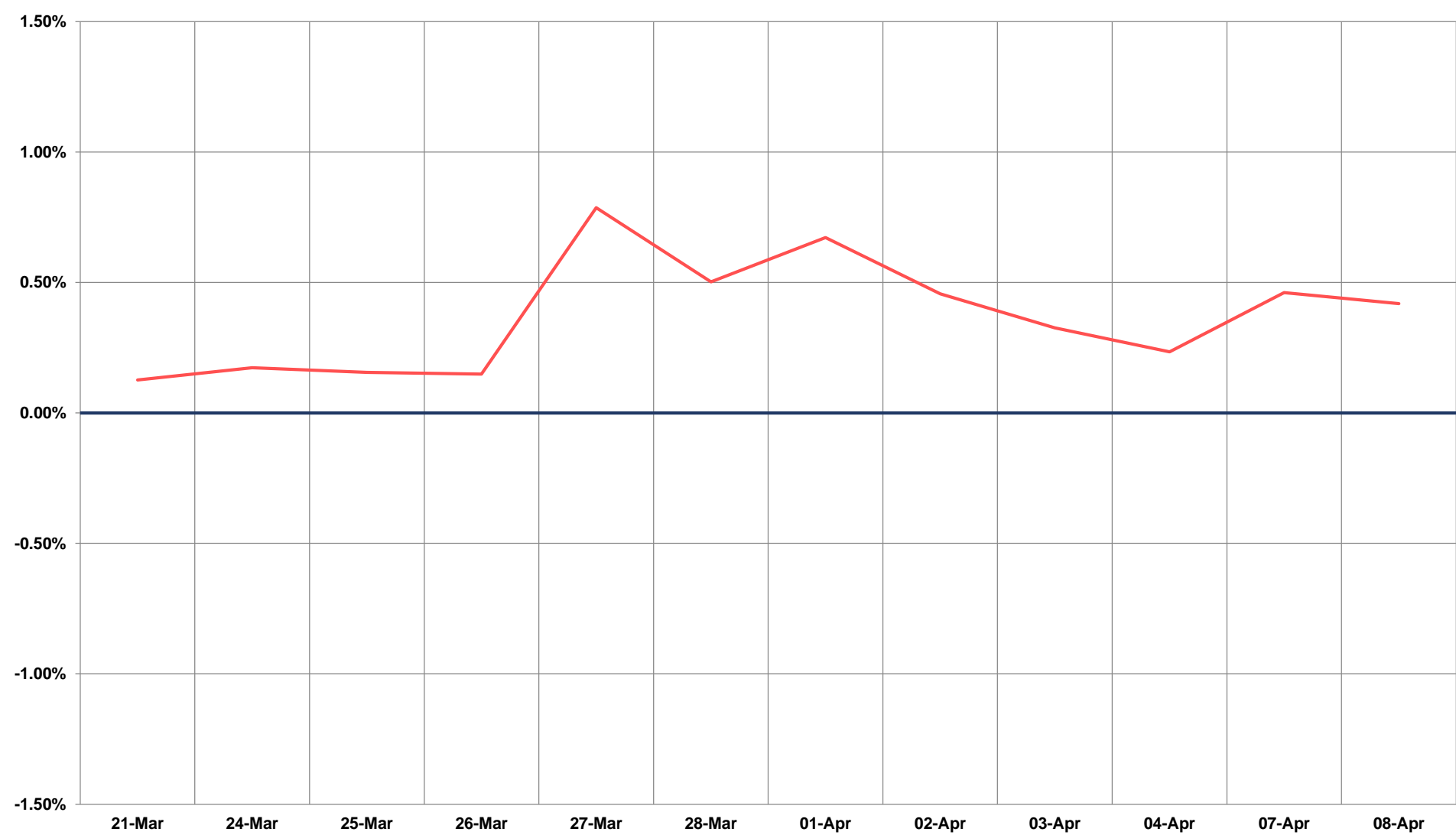
# TECHNICAL VIEWS



## NIFTY FUTURES



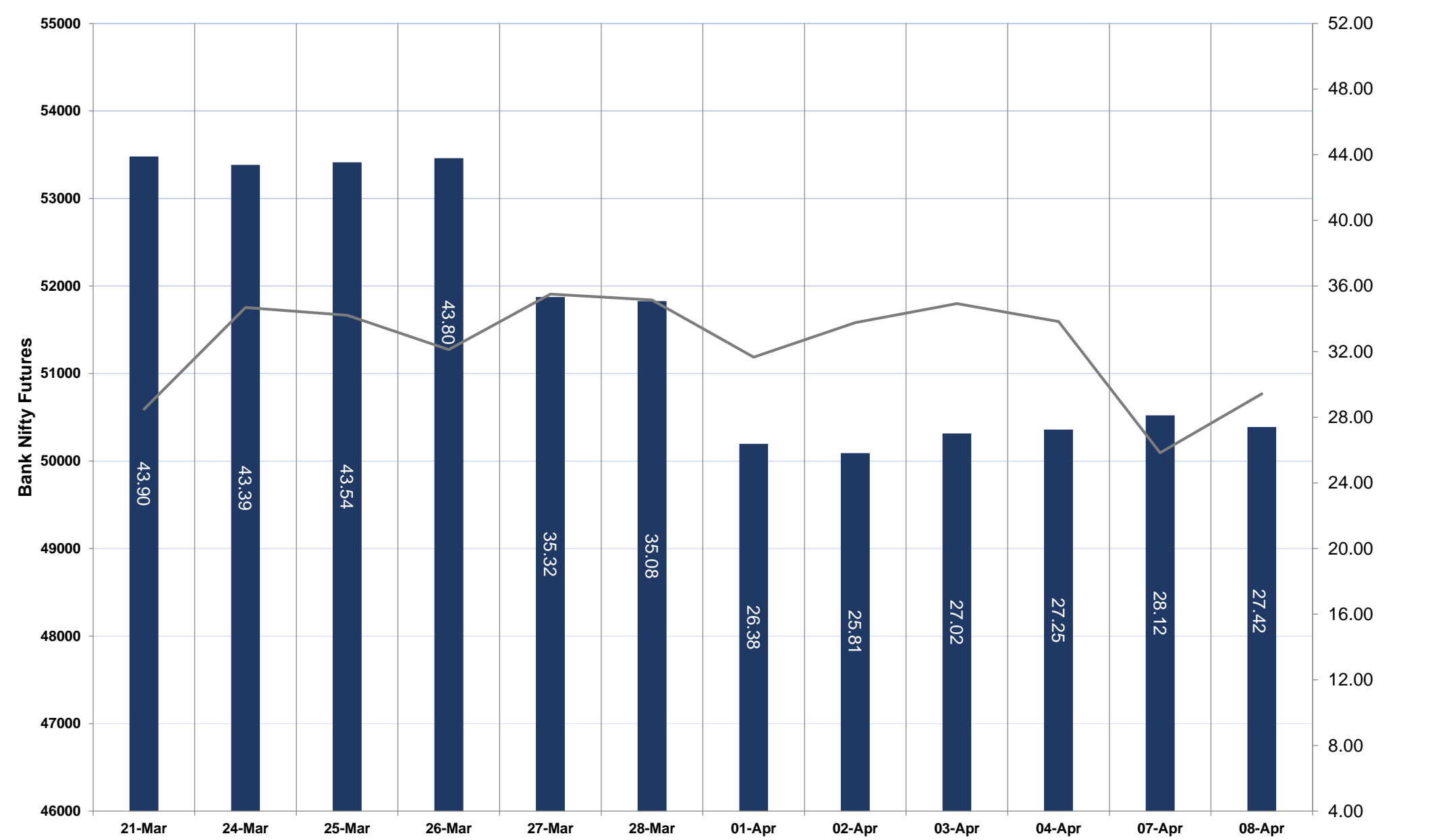
## SPREAD: FUTURE & SPOT



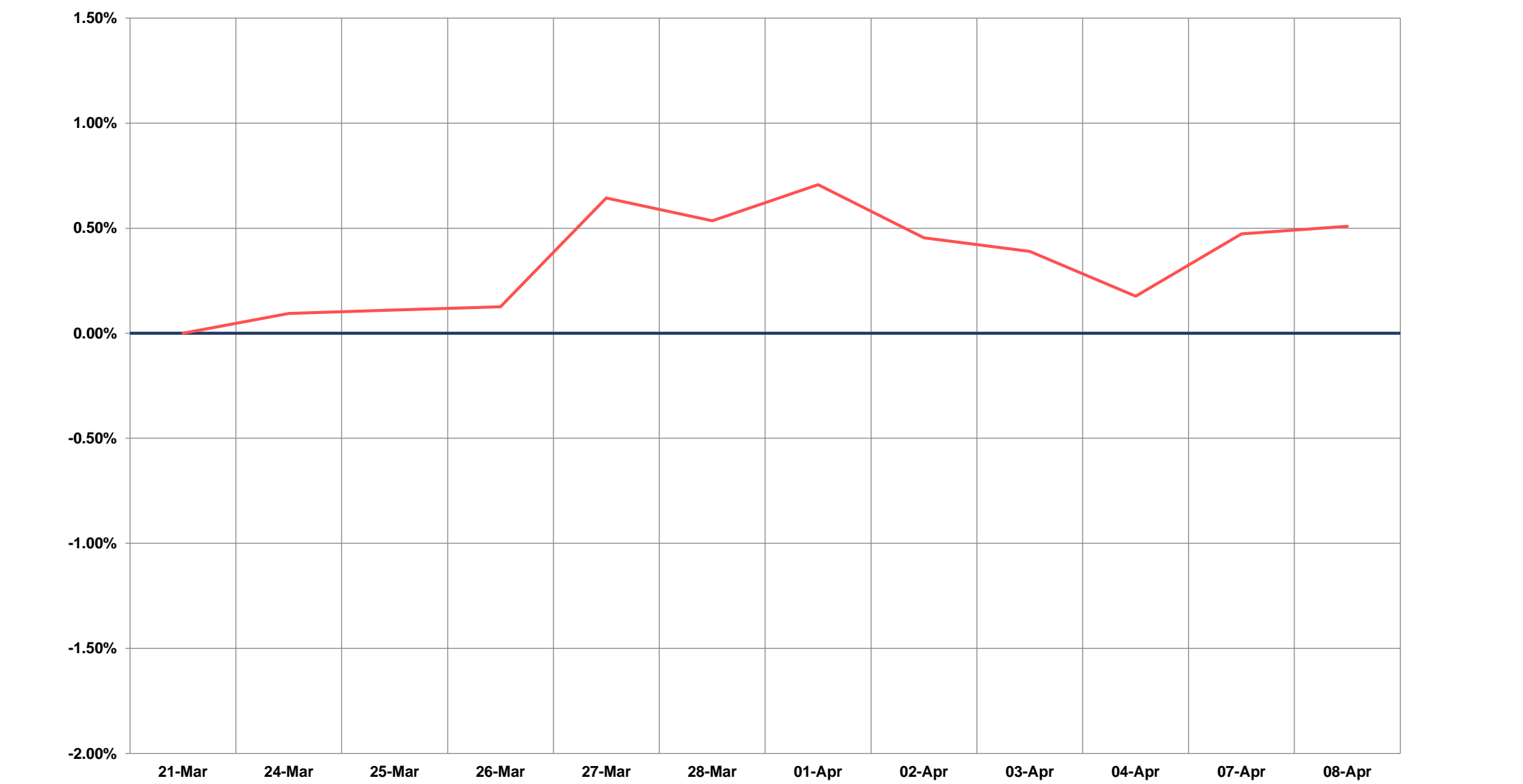
# TECHNICAL VIEWS



## BANK NIFTY FUTURES



## SPREAD: FUTURE & SPOT

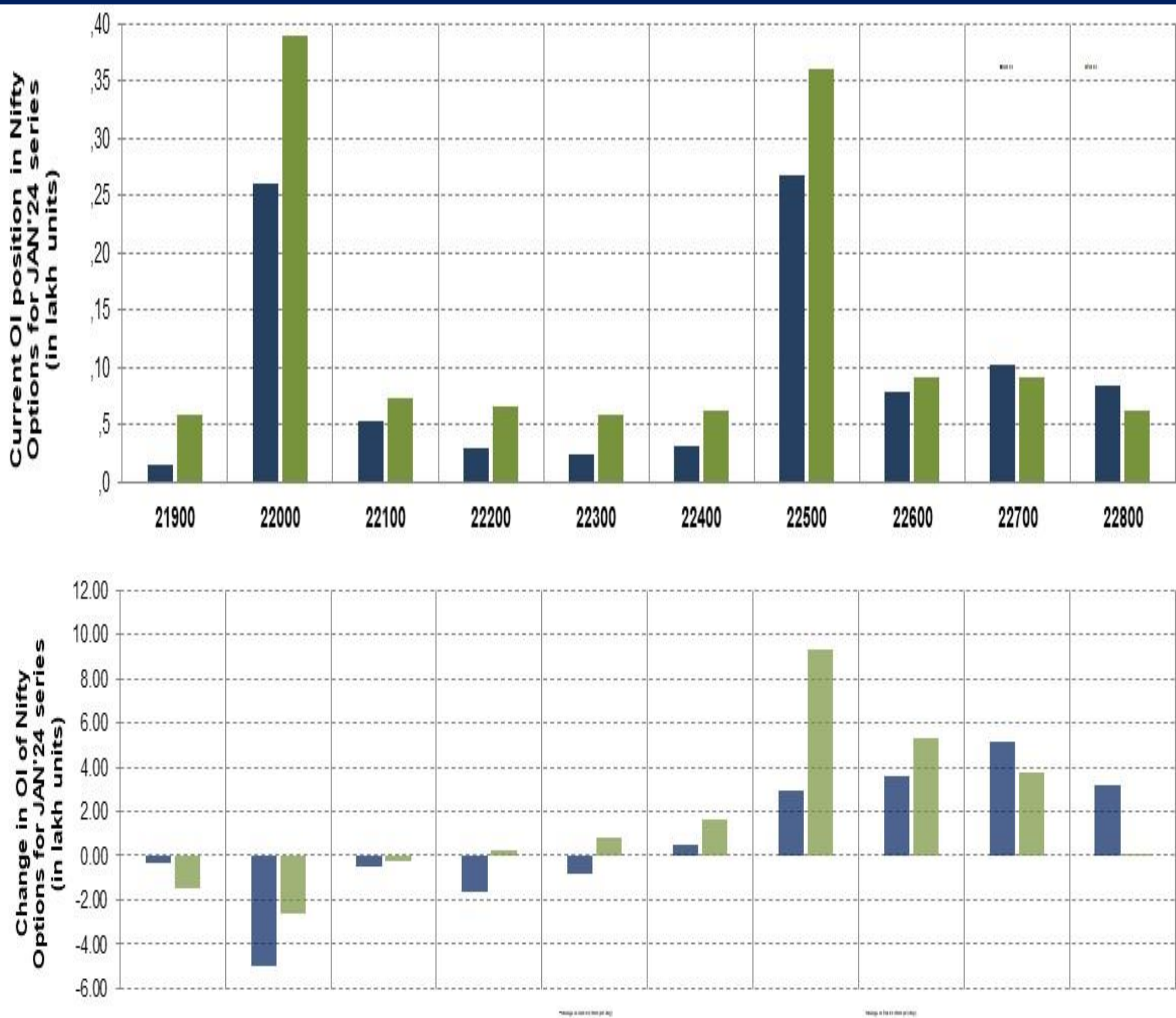




# TECHNICAL VIEWS



## NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.51 million in Open Interests is **Strike Price of 22700**
- **Most Active Nifty Put** with an addition of 0.93 millions in Open Interests is **Strike Price of 22500**
- **Maximum Open Interest an outstanding** was 2.68 millions for Calls at **Strike Price of 22500**
- **Maximum Open Interest an outstanding** was 3.89 millions for puts at **Strike Price of 22000**

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