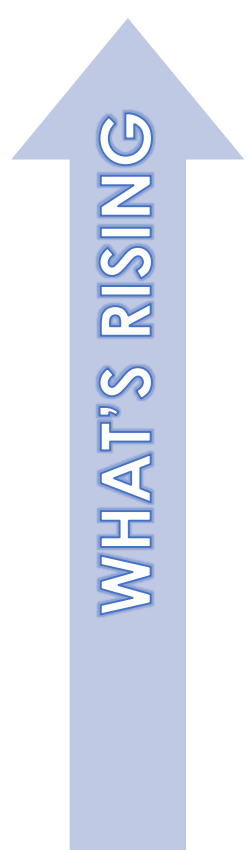


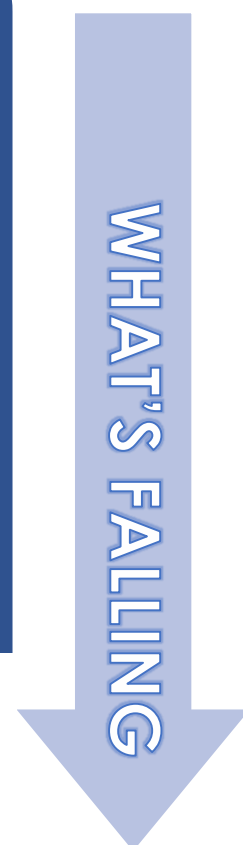


# MORNING MANTRA



BULLS

BEARS



Daily Derivatives & Market Report

APR 09, 2025



Indian equity markets ended lower on Wednesday, with both the Nifty and Sensex closing down by over half a percent, as traders were concerned about rising tensions between the U.S. and China, following new reciprocal tariffs on imports into the U.S. Markets made a gap-down opening and remained under selling pressure throughout the day. Traders overlooked report that the Reserve Bank of India (RBI) cut the repo rate by 25 bps for the second consecutive time.

Some of the important factors in trade:

**FII's extend selling streak:** Sentiments remained downbeat as the exchange data showed the foreign institutional investors (FIIs) continued their selling for the seventh consecutive session on April 8, as they sold equities worth Rs 4,994.24 crore.

**RBI says trade tariff concerns challenge global markets:** Traders were cautious as the RBI said that the global economic outlook is facing new challenges due to recent trade tariff announcements. These developments have caused sharp falls in the dollar index, equity markets, and crude oil prices.

**RBI cuts repo rate by 25 bps:** Traders overlooked report that the RBI slashed key interest rate by 25 basis points, for the second time in a row, to support a shuttering economy hit by reciprocal tariffs imposed by the US.

**Global front:** European markets were trading in the red as U.S. President Donald Trump pushed ahead with higher duties on roughly 60 trading partners that he dubbed the worst offenders. Asian markets ended mostly in red as Japan's consumer sentiment decreased further in March to the lowest level in two years. The seasonally adjusted consumer confidence index weakened to 34.1 in March from 34.8 in February.

# MARKET SELFIE



## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	73847.15	-379.93	-0.51
NIFTY	22418.00	-117.85	-0.52
MIDCAP	39546.54	-290.90	-0.73
SMLCAP	44446.07	-486.35	-1.08
BSEFMC	19947.90	297.22	1.51
HEALTHCARE	39562.52	-478.86	-1.20
AUTO	45145.04	29.41	0.07
POWER	6346.88	-29.64	-0.46
REALTY	6038.99	-123.26	-2.00
BSE IT	32022.40	-655.23	-2.01
BANKEX	57487.75	-500.80	-0.86
OIL GAS	24068.45	-87.96	-0.36
METAL	26617.19	-389.23	-1.44
INDIA VIX	21.43	0.99	4.84

## ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1194	1695	36
BSE	1527	2359	144

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	3605	5127	(30)
NSE CASH	80977	94248	(14)
NSE F&O	162109	209341	(23)

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	20.36	3.31	1.38
SENSEX	20.58	3.80	1.24

# KEY NUMBERS TRACKER



FII – DII ACTIVITY IN CASH SEGMENT (₹ in Crs)			
FII-DII*	Buy	Sell	Net
DII	13990	11014	2977
FII	11959	16317	(4358)

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)			
FII	Buy	Sell	Net
Index Futures	4435.72	5584.59	(1149)
Index Options	2519734.52	2611389.38	(91655)
Stock Futures	18627.63	19639.86	(1012)
Stock Options	56655.37	58236.70	(1581)

PUT-CALL RATIO		
Index	Current	Previous
NIFTY	0.90	0.83
BANK NIFTY	0.78	0.81

DOLLAR INDEX			
Dollar Index	Current	Previous	% Change
DXY	102.25	102.91	-0.63

10-YEARS G-SEC YIELD			
Country	Current	Previous	% Change
INDIA	6.444	6.473	-0.45
USA	4.434	4.260	4.13

KEY COMMODITIES TRACKER (in \$)			
Commodity	Current	Change Points	% Change
Gold	3041.86	62.76	2.11
Silver	30.32	0.73	2.48
Crude-Oil	56.92	-2.66	-4.46
Brent-Crude	60.14	-2.67	-4.25

# CURRENCY FUTURES & INDEX TRENDS TRACKER



## CURRENCY FUTURES

Expiry	Close	Change Points	% Change
28 APR-25 USD-INR	86.84	0.44	0.51
28 APR-25 EUR-INR	95.88	1.34	1.41
28 APR-25 GBP-INR	111.23	0.88	0.79
28 APR-25 JPY- INR	60.15	1.11	1.88

## INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS

Index	Close	S2	S1	Pivot	R1	R2
NIFTY	22399	22292	22345	22407	22461	22522
SENSEX	73847	73444	73646	73875	74076	74305
NIFTY FUTURES	22480	22337	22408	22476	22547	22615
BANK NIFTY	50240	49630	49935	50216	50521	50802
CNX IT	32517	31931	32224	32493	32786	33055
CNX MIDCAP	49582	48572	49077	49411	49916	50250
CNX SMALLCAP	15257	14976	15116	15241	15382	15507
INDIA VIX	21.43	18.91	20.17	20.96	22.22	23.01

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

## SECURITIES BAN IN F&O TRADES FOR 11-04-2025

**BSOFT, HINDCOPPER, MANAPPURAM, NATIONALUM**



# TECHNICAL VIEWS



## NIFTY

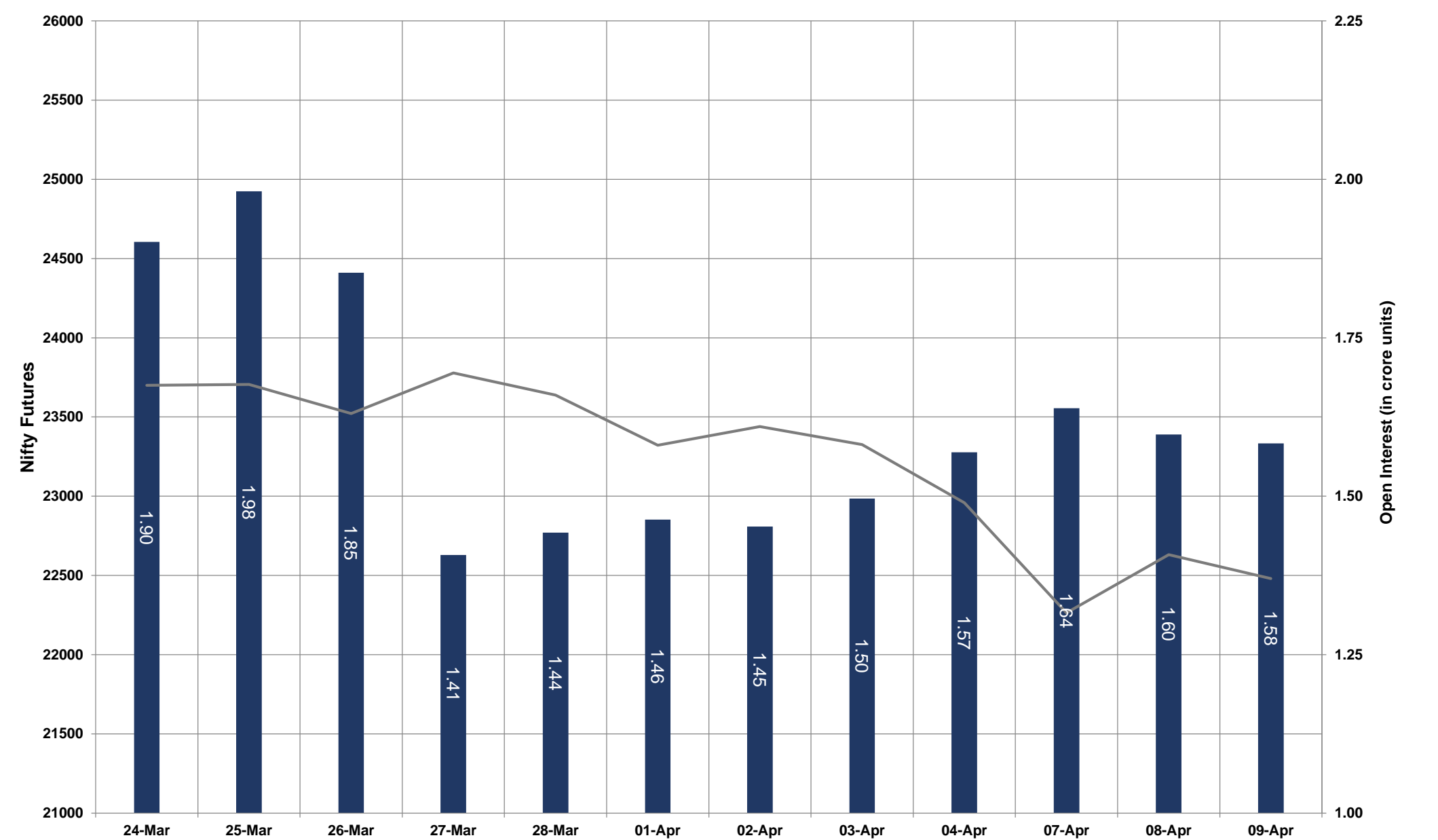


- Nifty Cash = **22418.00 (-0.52%)**
- Resistance levels = **22650** and **22900**
- Support levels = **22250** and **22000**

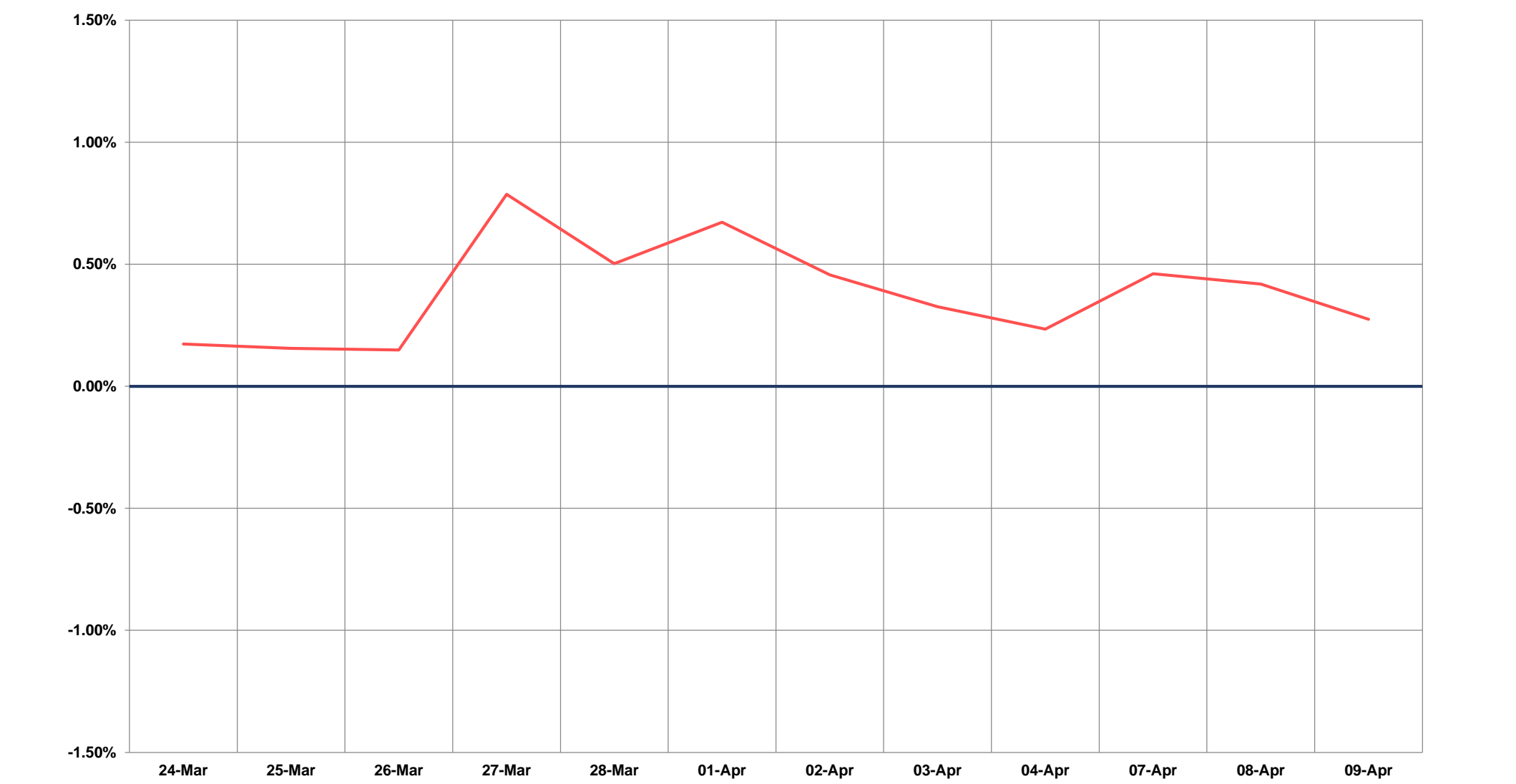
# TECHNICAL VIEWS



## NIFTY FUTURES



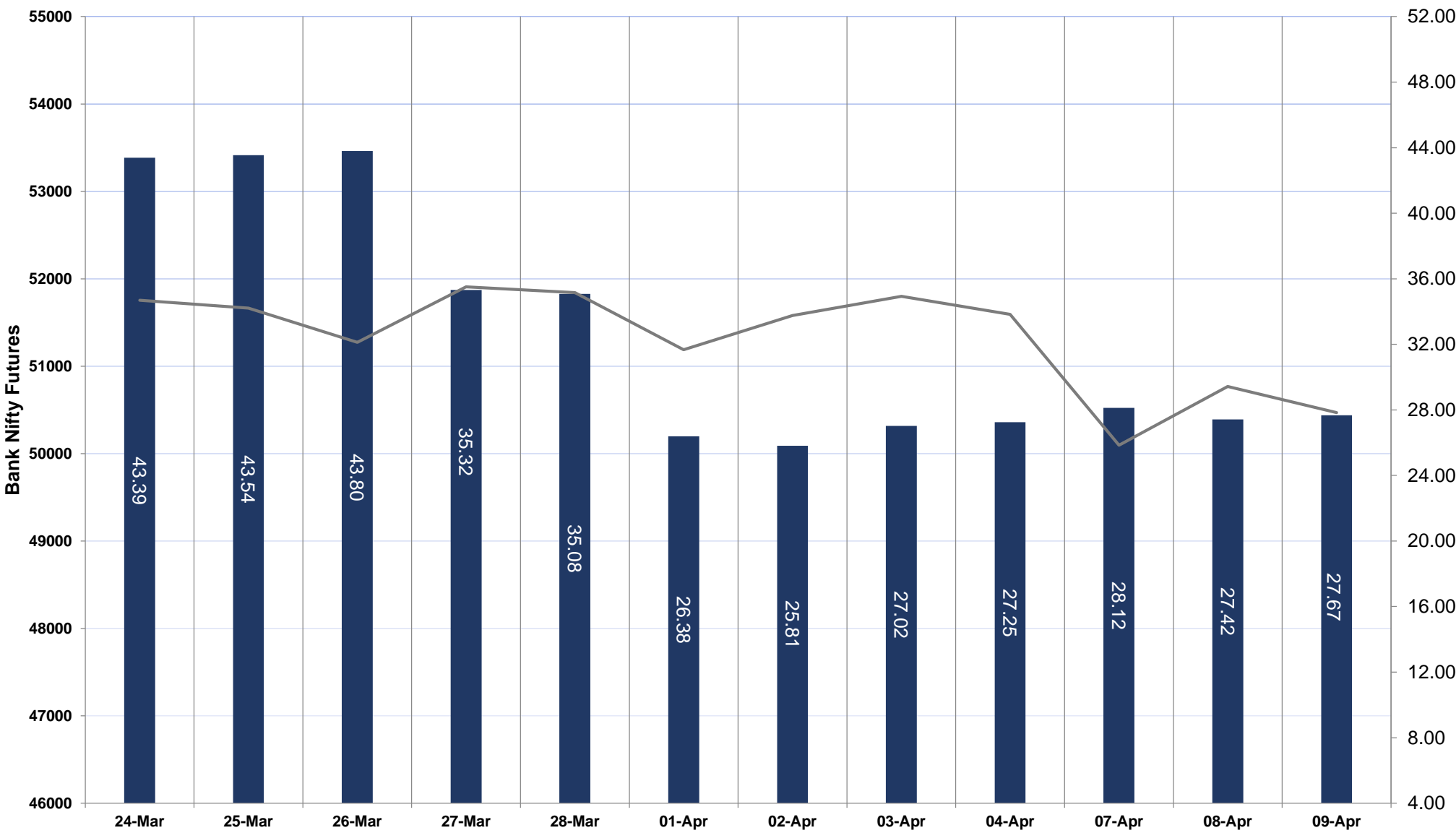
## SPREAD: FUTURE & SPOT



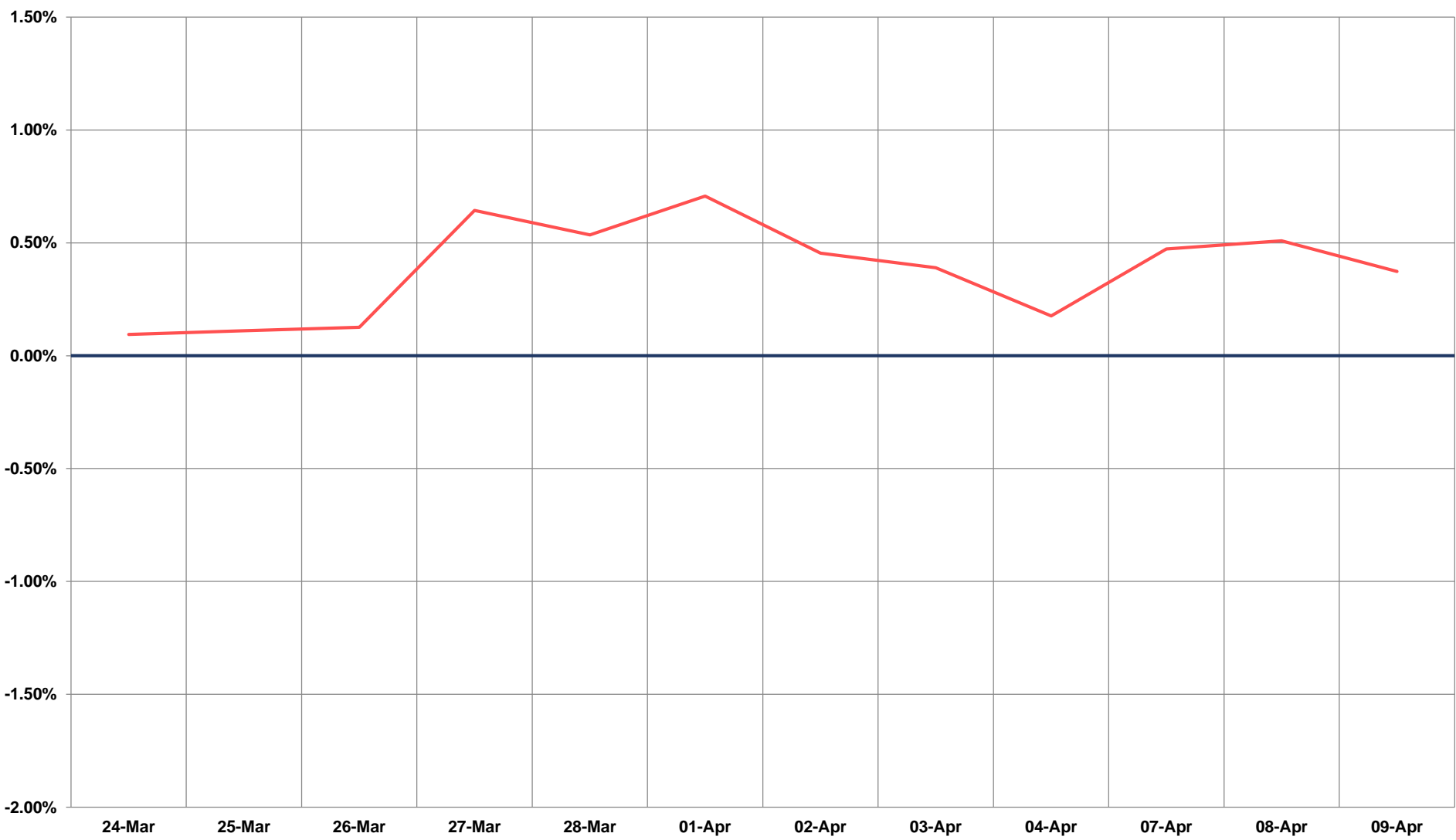
# TECHNICAL VIEWS



## BANK NIFTY FUTURES



## SPREAD: FUTURE & SPOT

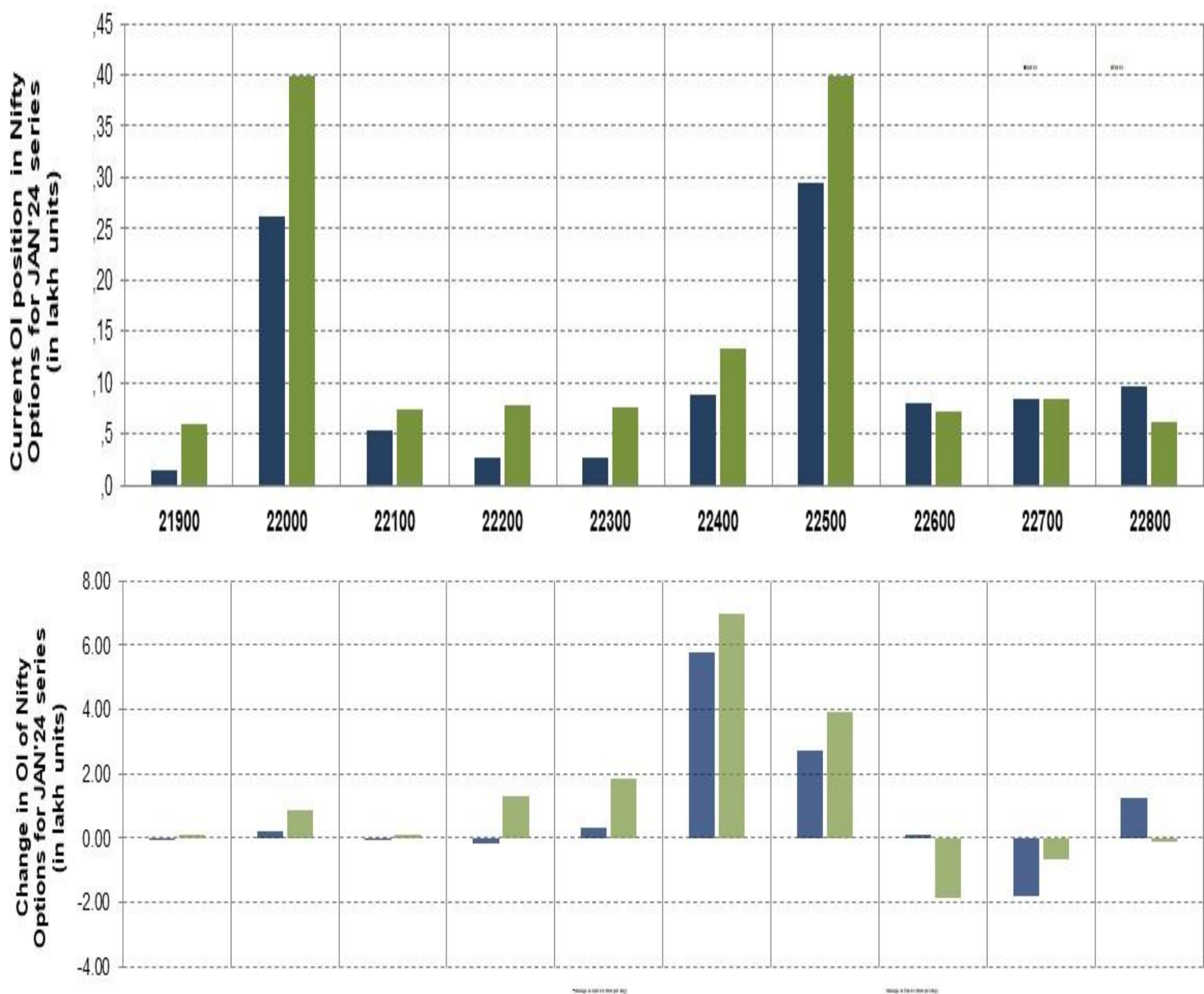




# TECHNICAL VIEWS



## NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.57 million in Open Interests is **Strike Price of 22400**
- **Most Active Nifty Put** with an addition of 0.69 millions in Open Interests is **Strike Price of 22400**
- **Maximum Open Interest** an outstanding was 2.95 millions for Calls at **Strike Price of 22500**
- **Maximum Open Interest** an outstanding was 3.99 millions for puts at **Strike Price of 22500**

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