



MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

APR 17, 2025



Local equity markets closed near day's high points on Thursday, with both the Nifty and Sensex extending their gains for the fourth consecutive session, driven by value buying from investors. Indices made a negative start as the World Trade Organisation (WTO) stated that the world merchandise trade is expected to decline by 0.2 per cent in volume terms in 2025. However, markets staged a recovery and ended the day on a positive note.

Some of the important factors in trade:

FII inflows surge: Some support came with exchange data showed foreign portfolio investors stayed net buyers of Indian equities on Wednesday for the second session as they mopped up stocks worth Rs 3,936.42 crore.

India to grow by 6.5% in 2025: Traders were getting encouragement as a UN report said that India is expected to grow by 6.5 per cent in 2025 on the back of continued robust public spending and ongoing monetary easing, even as the world economy is on a recessionary trajectory, driven by escalating trade tensions and persistent uncertainty.

US imposes 125% tariff on China could fuel India's exports: Traders took some support after Global Trade Research Initiative (GTRI) in its latest report has stated that the US crackdown, which has imposed 125 per cent import tariffs on China, has unexpectedly created a rare opportunity for India's small manufacturers, offering them a short-term export window.

Global front: European markets were trading in red as investors worried about the impact of U.S. President Donald Trump's erratic trade policies on inflation, interest rates and global growth. Asian markets ended mostly in green as Bank of Korea kept its interest rate unchanged as uncertainty about future growth increased due to the changes in the US trade policies and the implementation of government stimulus measures.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	78553.21	1508.92	1.96
NIFTY	23851.65	414.45	1.77
MIDCAP	41980.48	234.26	0.56
SMLCAP	47946.66	248.31	0.52
BSEFMC	20558.56	124.00	0.61
HEALTHCARE	41697.12	377.90	0.91
AUTO	47909.47	476.88	1.01
POWER	6720.43	62.91	0.94
REALTY	6551.31	32.03	0.49
BSE IT	32946.50	79.51	0.24
BANKEX	62293.27	1557.21	2.56
OIL GAS	25605.41	248.34	0.98
METAL	28674.53	72.89	0.25
INDIA VIX	15.47	-0.40	-2.52

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1763	1013	78
BSE	2396	1563	147

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	5954	5360	11
NSE CASH	102750	92100	12
NSE F&O	282532	182090	55

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	21.68	3.53	1.30
SENSEX	21.89	4.04	1.16

KEY NUMBERS TRACKER



FII – DII ACTIVITY IN CASH SEGMENT (₹ in Crs)			
FII-DII*	Buy	Sell	Net
DII	13774	15780	(2006)
FII	18210	13542	4668

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)			
FII	Buy	Sell	Net
Index Futures	7011.97	6572.82	439
Index Options	4136936.75	4200101.23	(63164)
Stock Futures	44233.50	39401.37	4832
Stock Options	93922.88	89181.75	4741

PUT-CALL RATIO		
Index	Current	Previous
NIFTY	1.15	0.97
BANK NIFTY	1.17	1.13

DOLLAR INDEX			
Dollar Index	Current	Previous	% Change
DXY	99.39	99.27	0.11

10-YEARS G-SEC YIELD			
Country	Current	Previous	% Change
INDIA	6.372	6.394	-0.34
USA	4.329	4.279	1.17

KEY COMMODITIES TRACKER (in \$)			
Commodity	Current	Change Points	% Change
Gold	3326.70	-23.10	-0.69
Silver	32.47	-0.33	-1.02
Crude-Oil	64.57	2.10	3.36
Brent-Crude	67.85	2.00	3.04

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES				
Expiry		Close	Change Points	% Change
28 APR-25	USD-INR	85.44	-0.28	-0.33
28 APR-25	EUR-INR	97.15	-0.23	-0.24
28 APR-25	GBP-INR	113.04	-0.60	-0.53
28 APR-25	JPY- INR	59.85	-0.28	-0.46

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS						
Index	Close	S2	S1	Pivot	R1	R2
NIFTY	23852	23100	23476	23674	24050	24248
SENSEX	78553	75994	77274	77945	79225	79896
NIFTY FUTURES	23851	23142	23497	23685	24039	24227
BANK NIFTY	54290	52605	53448	53927	54770	55250
CNX IT	33372	32104	32738	33105	33739	34106
CNX MIDCAP	52658	51811	52234	52485	52909	53160
CNX SMALLCAP	16410	16199	16304	16380	16486	16562
INDIA VIX	15.47	14.30	14.89	15.67	16.26	17.04

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

SECURITIES BAN IN F&O TRADES FOR 17-04-2025
ANGELONE, HINDCOPPER, IREDA, MANAPPURAM, NATIONALUM

TECHNICAL VIEWS



NIFTY

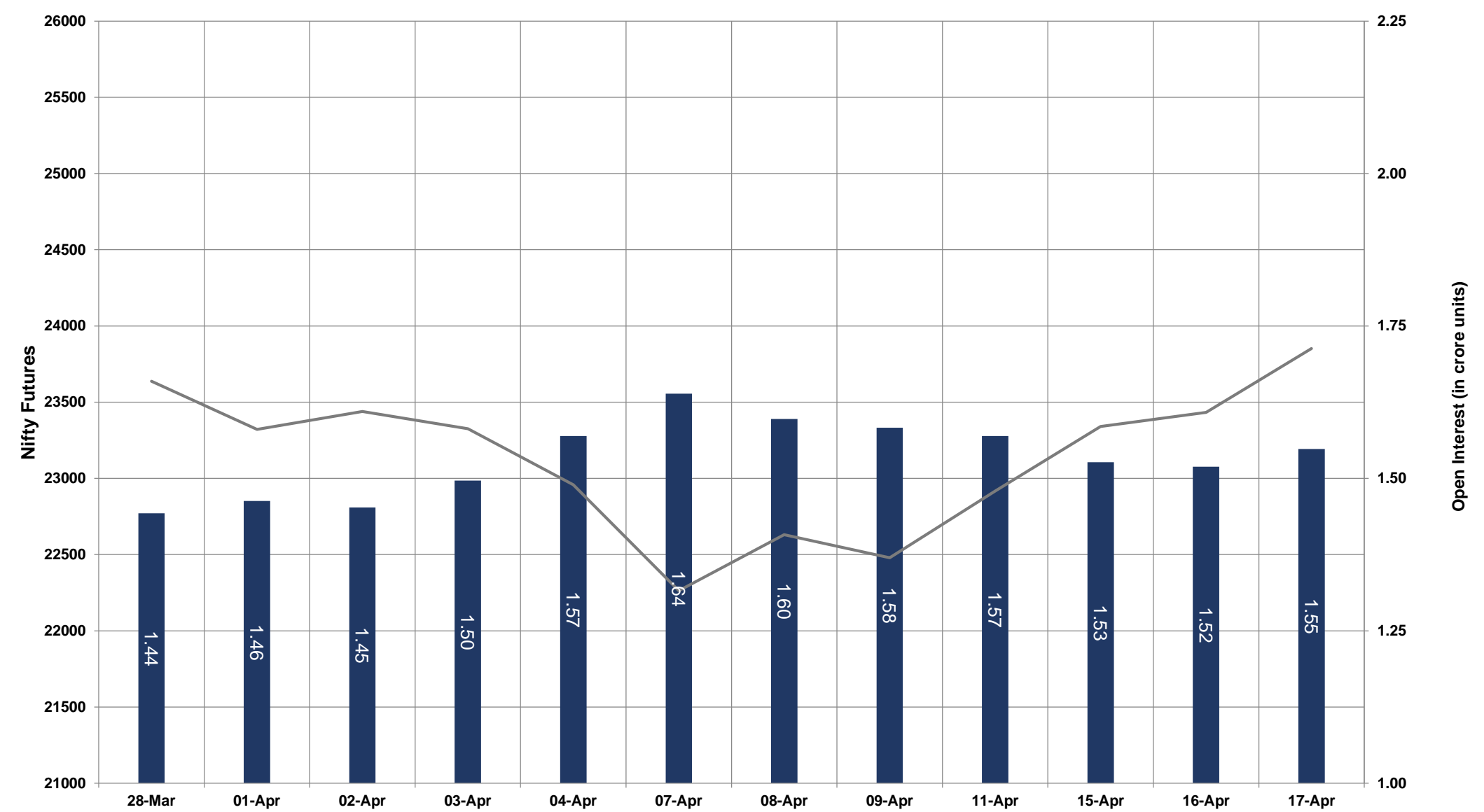


- Nifty Cash = **23851.65 (1.77%)**
- Resistance levels = **24050** and **24250**
- Support levels = **23550** and **23400**

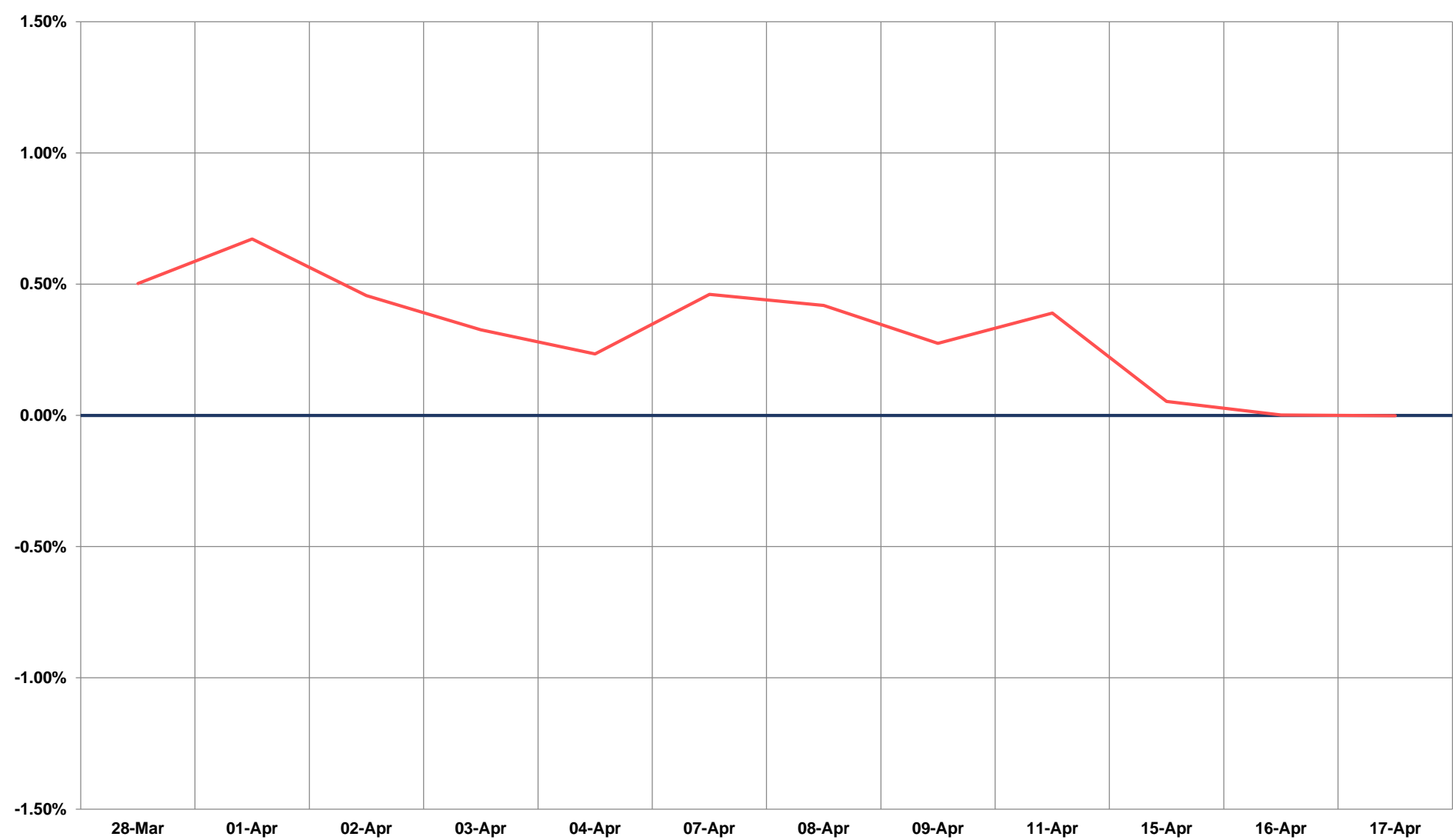
TECHNICAL VIEWS



NIFTY FUTURES



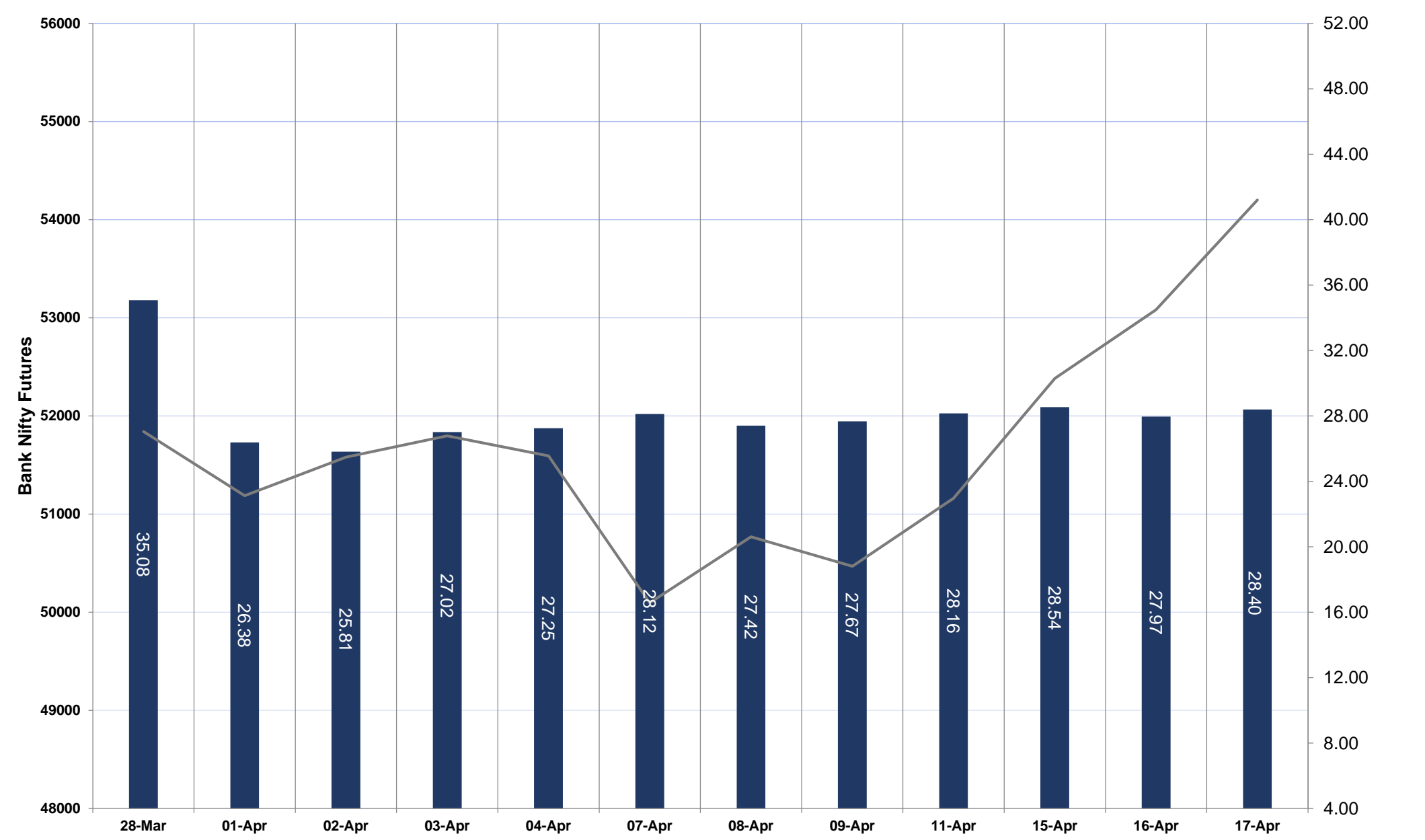
SPREAD: FUTURE & SPOT



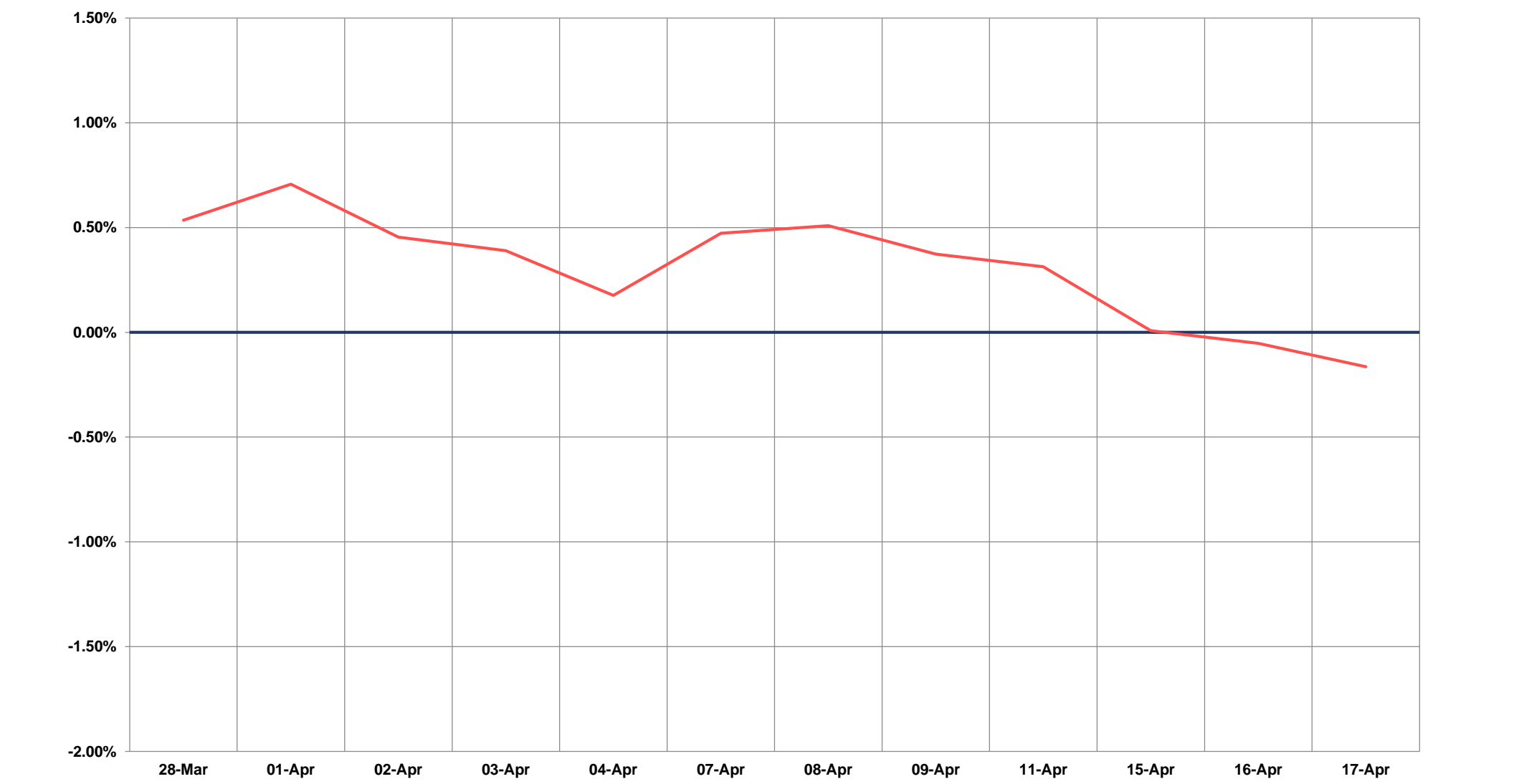
TECHNICAL VIEWS



BANK NIFTY FUTURES



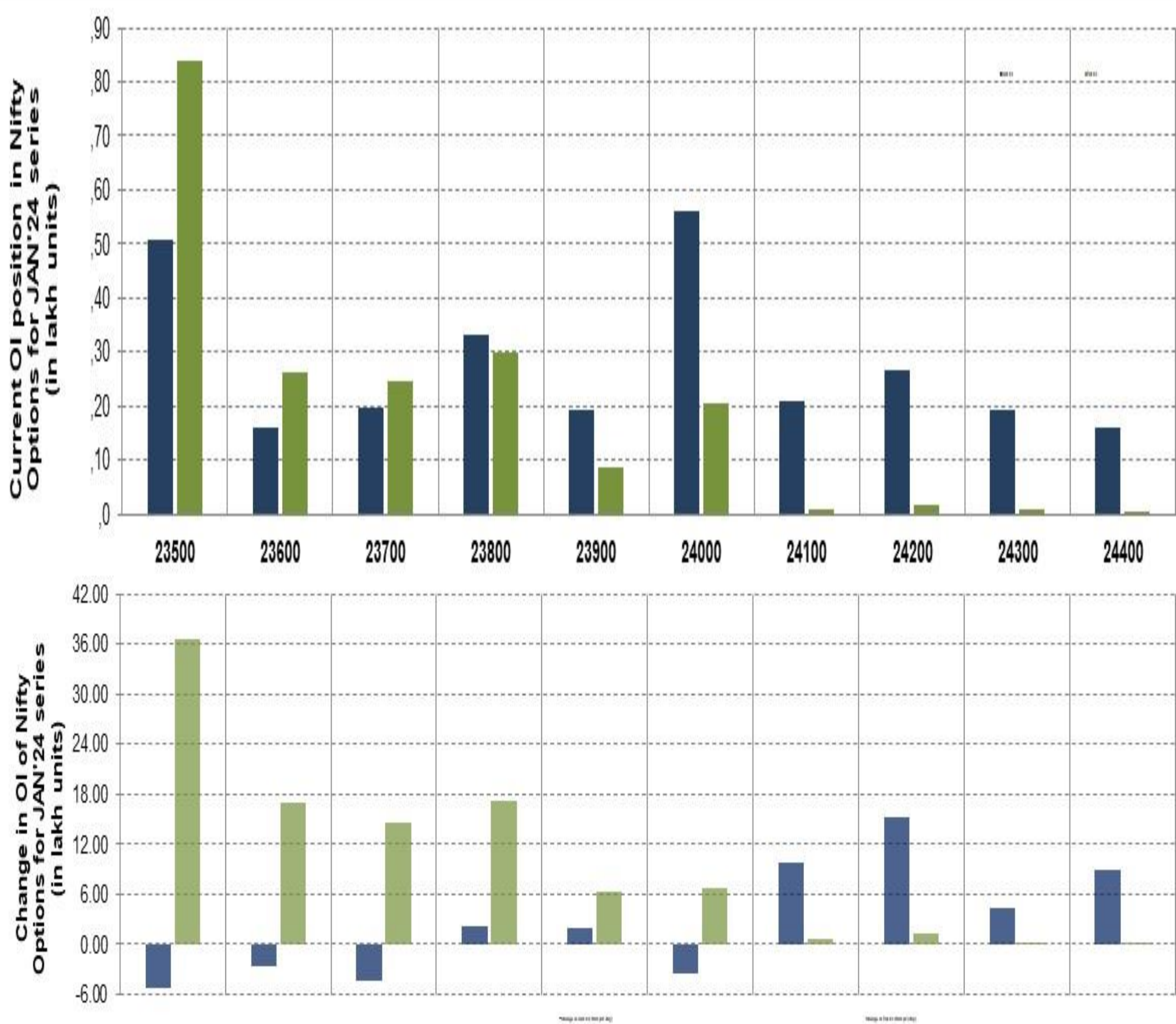
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 1.52 million in Open Interests is **Strike Price of 24200**
- **Most Active Nifty Put** with an addition of 3.64 millions in Open Interests is **Strike Price of 23500**
- **Maximum Open Interest** an outstanding was 5.59 millions for Calls at **Strike Price of 24000**
- **Maximum Open Interest** an outstanding was 8.39 millions for puts at **Strike Price of 23500**

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