



MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

APR 22, 2025



Indian equity markets ended in a positive terrain on Tuesday, with both the Nifty and the Sensex extending their winning streak for the sixth consecutive session, driven by gains in banking sector stocks. Indices made a slightly positive start but turned volatile in early session amid concerns about a global trade war while they await signs of progress from US President Donald Trump's trade talks. However, markets regained momentum and remained in positive territory throughout the session, supported by sustained foreign fund inflows and consistent buying in fundamentally strong stocks.

Some of the important factors in trade:

FII inflows in the domestic markets: Sentiment remained upbeat amid continuous foreign fund inflows and buying in blue-chip bank stocks. Foreign Institutional Investors (FIIs) bought equities worth Rs 1,970.17 crore on Monday.

India actively engaging with US: Traders took support with Finance Minister Nirmala Sitharaman's statement that India is 'actively engaging' with the new US administration and hopes to conclude the first tranche of the bilateral trade agreement 'positively' by fall (September-October) this year.

Key infrastructure sectors' growth slows in March: Traders overlooked report that the Ministry of Commerce & Industry in its latest data has showed the output of eight key infrastructure sectors slowed down to 3.8 per cent (provisional) in March 2025, as against 6.3 per cent growth registered a year ago.

Global front: European markets were trading mostly in red as U.S. President Donald Trump's remarks on Federal Reserve Chair Jerome Powell reignited concerns about Fed independence and political interference. Asian markets ended mixed following the broadly negative cues from US markets overnight, as traders remained cautious and concerned about a global trade war.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	79595.60	187.10	0.24
NIFTY	24167.25	41.70	0.17
MIDCAP	43252.46	349.44	0.81
SMLCAP	49143.12	397.70	0.82
BSEFMC	20786.63	382.00	1.87
HEALTHCARE	42285.05	315.43	0.75
AUTO	49071.45	147.12	0.30
POWER	6828.61	-59.44	-0.86
REALTY	6860.78	160.82	2.40
BSE IT	33503.78	-202.70	-0.60
BANKEX	63806.75	385.45	0.61
OIL GAS	26250.03	-23.55	-0.09
METAL	29251.52	2.93	0.01
INDIA VIX	15.23	-0.29	-1.87

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1982	976	50
BSE	2475	1505	150

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	7028	6556	7
NSE CASH	109084	105363	4
NSE F&O	407126	427295	(5)

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	21.97	3.57	1.28
SENSEX	22.18	4.10	1.15

KEY NUMBERS TRACKER



FII – DII ACTIVITY IN CASH SEGMENT (₹ in Crs)			
FII-DII*	Buy	Sell	Net
DII	15154	16040	(886)
FII	16703	15412	1290

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)			
FII	Buy	Sell	Net
Index Futures	10948.70	11183.76	(235)
Index Options	1227459.73	1231455.64	(3996)
Stock Futures	137183.73	136943.40	240
Stock Options	92743.53	93445.79	(702)

PUT-CALL RATIO		
Index	Current	Previous
NIFTY	1.10	1.15
BANK NIFTY	1.16	1.18

DOLLAR INDEX			
Dollar Index	Current	Previous	% Change
DXY	98.36	98.32	0.05

10-YEARS G-SEC YIELD			
Country	Current	Previous	% Change
INDIA	6.320	6.320	0.00
USA	4.401	4.405	-0.09

KEY COMMODITIES TRACKER (in \$)			
Commodity	Current	Change Points	% Change
Gold	3457.10	22.80	0.66
Silver	32.67	-0.05	-0.16
Crude-Oil	63.36	0.95	1.52
Brent-Crude	67.25	0.98	1.48

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES

Expiry	Close	Change Points	% Change
28 APR-25 USD-INR	85.24	0.05	0.06
28 APR-25 EUR-INR	97.93	-0.24	-0.24
28 APR-25 GBP-INR	113.90	-0.10	-0.09
28 APR-25 JPY- INR	60.66	0.02	0.04

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS

Index	Close	S2	S1	Pivot	R1	R2
NIFTY	24167	23990	24079	24161	24249	24331
SENSEX	79596	78987	79291	79558	79862	80129
NIFTY FUTURES	24169	23999	24084	24162	24247	24325
BANK NIFTY	55647	54900	55273	55617	55991	56335
CNX IT	33941	33612	33777	33954	34118	34295
CNX MIDCAP	54397	53501	53949	54292	54740	55083
CNX SMALLCAP	16896	16636	16766	16871	17001	17106
INDIA VIX	15.23	13.79	14.51	15.26	15.98	16.73

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 23-04-2025

MANAPPURAM, RBLBANK

TECHNICAL VIEWS



NIFTY

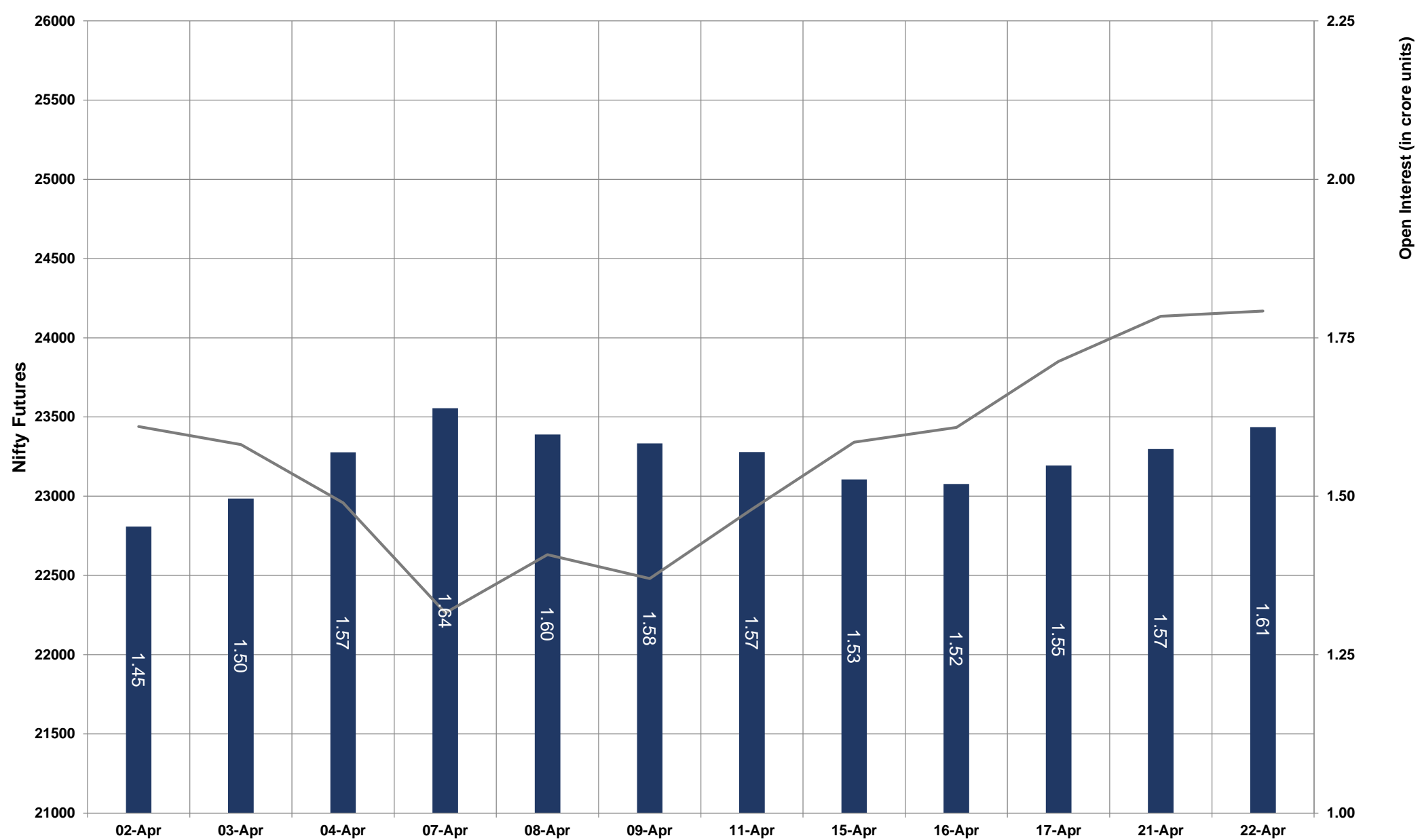


- Nifty Cash = **24167.25 (0.17%)**
- Resistance levels = **24250** and **24400**
- Support levels = **24000** and **23850**

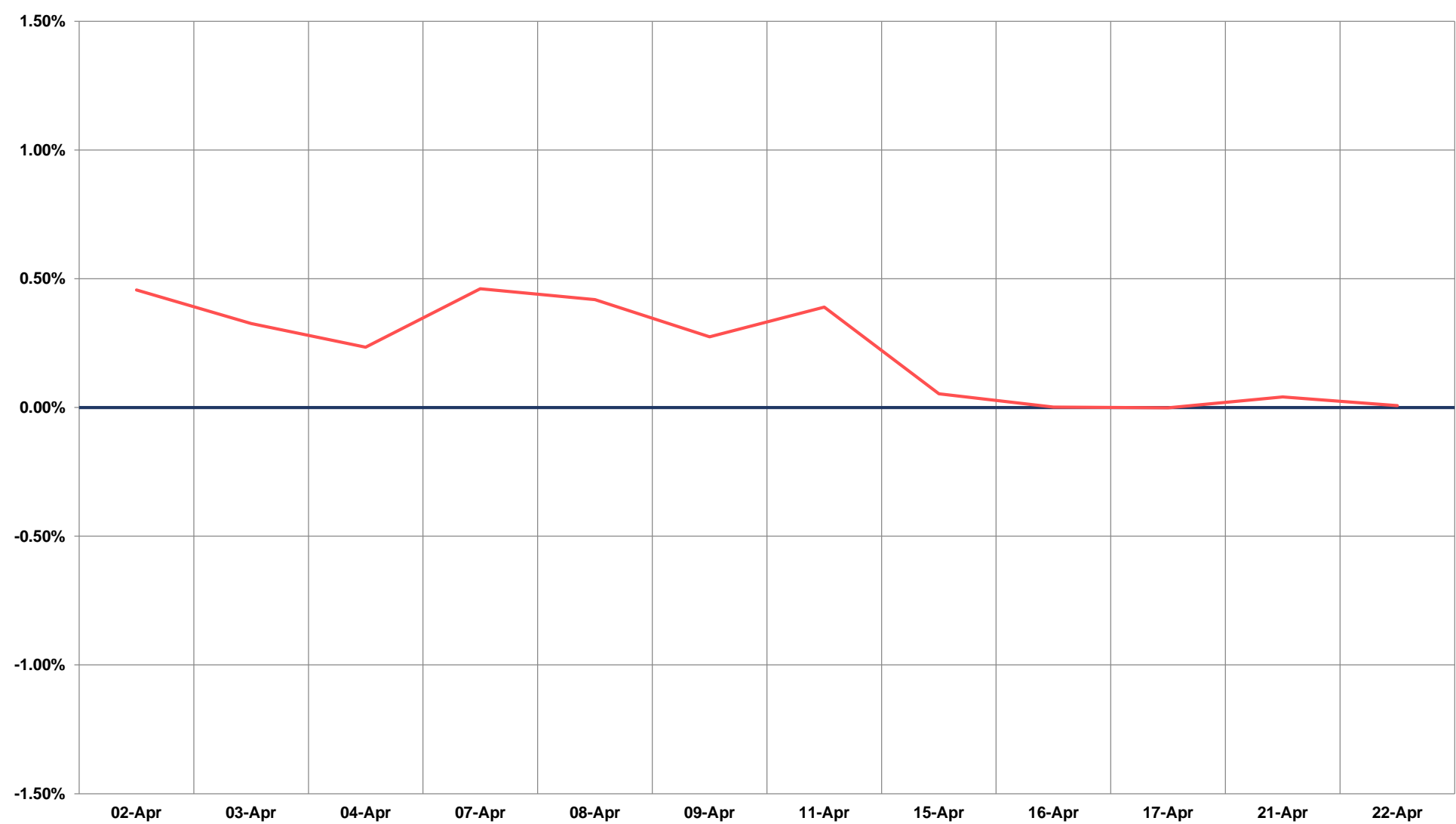
TECHNICAL VIEWS



NIFTY FUTURES



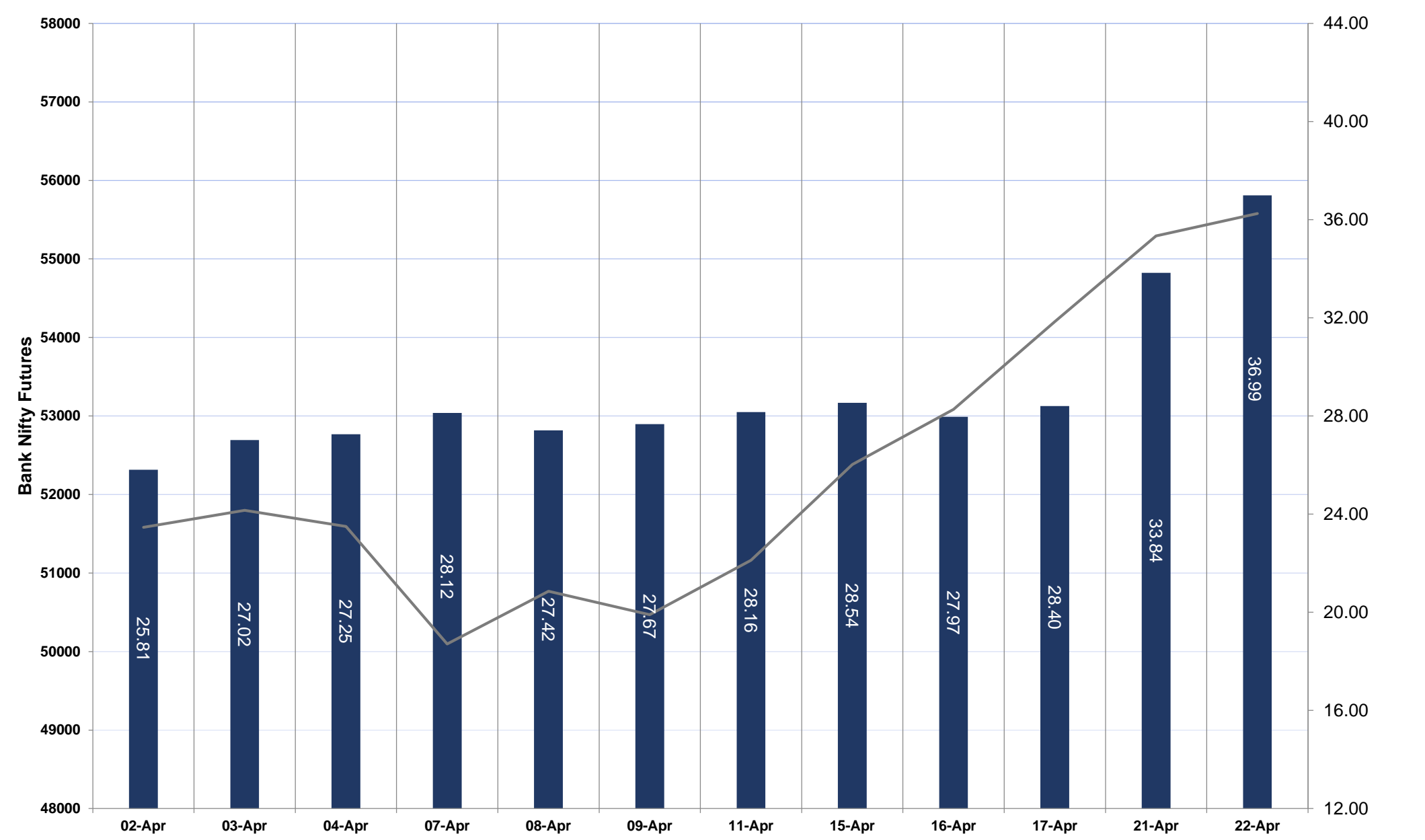
SPREAD: FUTURE & SPOT



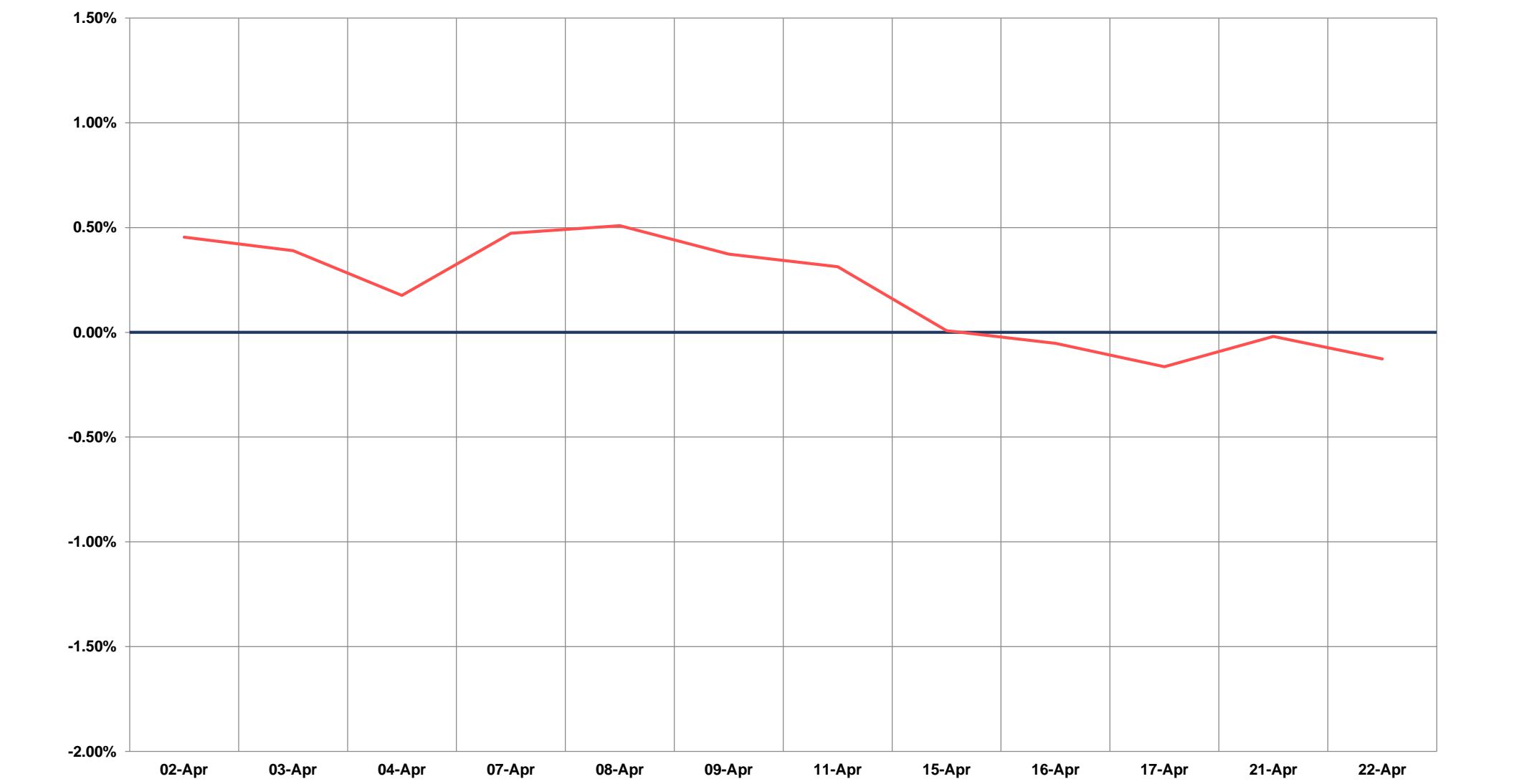
TECHNICAL VIEWS



BANK NIFTY FUTURES



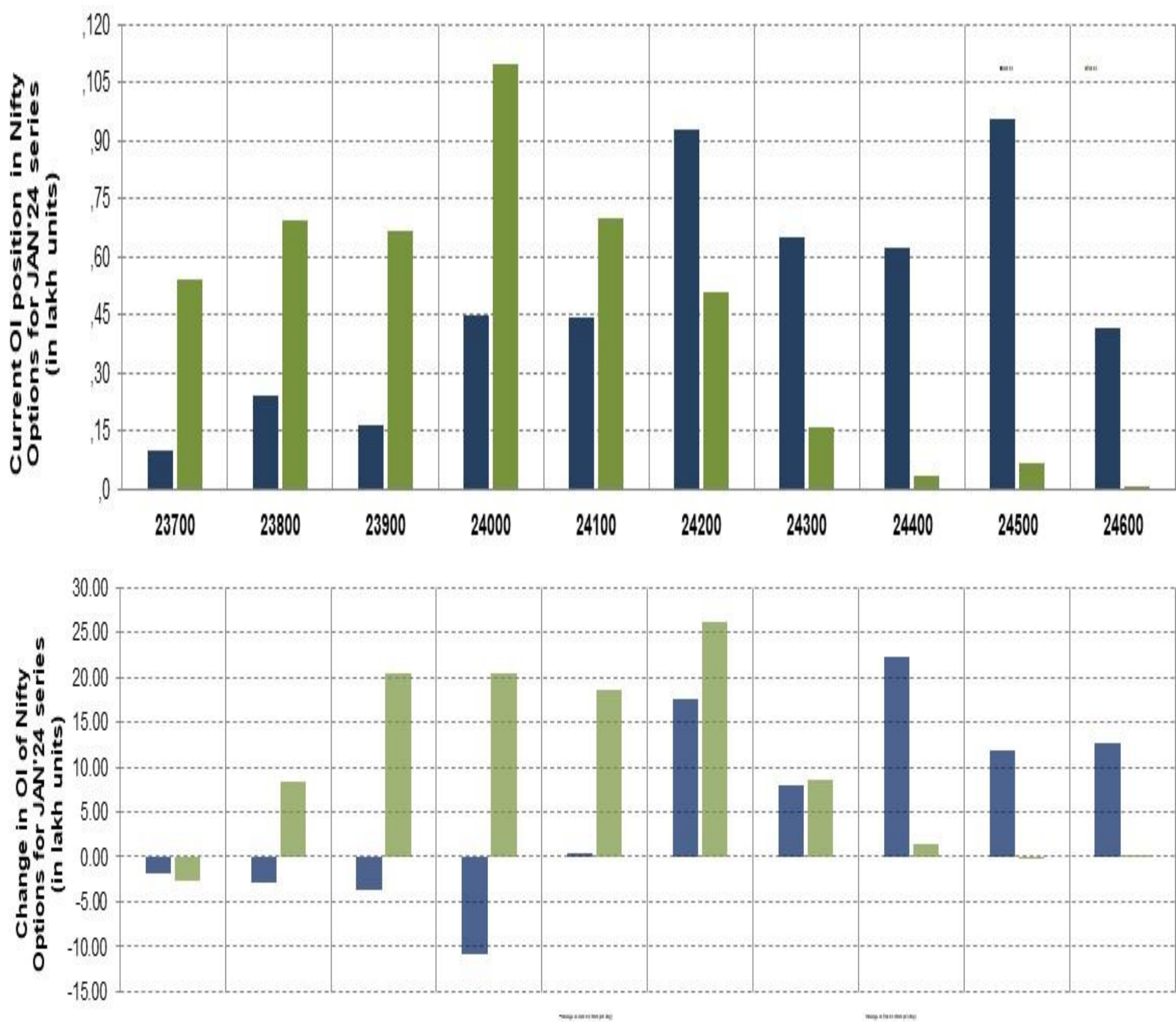
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 2.29 million in Open Interests is **Strike Price of 24400**
- **Most Active Nifty Put** with an addition of 2.61 millions in Open Interests is **Strike Price of 24200**
- **Maximum Open Interest an outstanding** was 9.55 millions for Calls at **Strike Price of 24500**
- **Maximum Open Interest an outstanding** was 10.97 millions for puts at **Strike Price of 24000**

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