



MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

APR 23, 2025



Indian equity markets extended their winning streak to the seventh consecutive session, with both the Nifty and Sensex surging over half a percent, ahead of the monthly F&O expiry. After making a positive start, soon indices pared most of their early gains as investors sentiment turned cautious as the International Monetary Fund (IMF) in its World Economic Outlook (WEO) report for April has lowered growth projection for India to 6.2% for the fiscal year 2025-26. However, markets regained momentum and ended higher, buoyed by strong buying interest in IT and Auto stocks, which helped to lift overall market sentiments.

Some of the important factors in trade:

Continuous foreign fund inflows: Foreign Institutional Investors (FIIs) bought equities worth Rs 1,290.43 crore on Tuesday, according to exchange data. Since the last five trading sessions, FIIs have been on a buying spree.

India's private sector growth hits 8-month high in April: Traders got support as HSBC Flash India PMI report has showed that India's private sector growth hit an eight-month high in the month of April on the back of buoyant international demand for goods and services.

India aims to double share of manufacturing in GDP: Some optimism came as Finance Minister Nirmala Sitharaman said that India plans to increase the share of the manufacturing sector from 12 per cent to 23 per cent over the next two decades, aiming to create jobs and drive economic growth.

Global front: European markets were trading in green as Trump admitted that the 145 percent tariffs on China are 'very high' and they will come down substantially. Asian markets ended mostly in green despite manufacturing sector in Japan continued to contract in April, albeit at a slower rate with a manufacturing PMI score of 48.5.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	80116.49	520.90	0.65
NIFTY	24328.95	161.70	0.67
MIDCAP	43660.36	407.90	0.94
SMLCAP	49272.64	129.52	0.26
BSEFMC	20884.14	97.51	0.47
HEALTHCARE	42693.01	407.96	0.96
AUTO	50220.98	1149.53	2.34
POWER	6894.54	65.93	0.97
REALTY	6954.92	94.14	1.37
BSE IT	34842.92	1339.14	4.00
BANKEX	63204.91	-601.84	-0.94
OIL GAS	26277.02	26.99	0.10
METAL	29480.21	228.69	0.78
INDIA VIX	15.96	0.73	4.79

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1713	1207	33
BSE	2028	1949	129

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	6784	7028	(3)
NSE CASH	116245	109084	7
NSE F&O	428430	407126	5

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	21.99	3.60	1.27
SENSEX	22.33	4.12	1.14

KEY NUMBERS TRACKER



FII – DII ACTIVITY IN CASH SEGMENT (₹ in Crs)			
FII-DII*	Buy	Sell	Net
DII	15151	16385	(1234)
FII	17507	14174	3333

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)			
FII	Buy	Sell	Net
Index Futures	11207.23	9881.11	1326
Index Options	2265931.84	2277944.11	(12012)
Stock Futures	107736.99	103420.08	4317
Stock Options	88011.17	89297.42	(1286)

PUT-CALL RATIO		
Index	Current	Previous
NIFTY	1.08	1.10
BANK NIFTY	1.04	1.16

DOLLAR INDEX			
Dollar Index	Current	Previous	% Change
DXY	99.10	99.63	-0.53

10-YEARS G-SEC YIELD			
Country	Current	Previous	% Change
INDIA	6.329	6.326	0.08
USA	4.271	4.389	-2.69

KEY COMMODITIES TRACKER (in \$)			
Commodity	Current	Change Points	% Change
Gold	3304.31	-32.01	-0.96
Silver	32.80	0.28	0.88
Crude-Oil	63.27	-0.40	-0.63
Brent-Crude	67.03	-0.38	-0.56

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES

Expiry	Close	Change Points	% Change
28 APR-25 USD-INR	85.45	0.22	0.25
28 APR-25 EUR-INR	97.37	-0.53	-0.54
28 APR-25 GBP-INR	113.69	-0.19	-0.17
28 APR-25 JPY- INR	60.34	-0.33	-0.54

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS

Index	Close	S2	S1	Pivot	R1	R2
NIFTY	24329	24030	24180	24269	24419	24509
SENSEX	80116	79212	79664	79959	80412	80707
NIFTY FUTURES	24313	24031	24172	24262	24403	24493
BANK NIFTY	55370	54608	54989	55544	55925	56480
CNX IT	35415	34321	34868	35195	35742	36070
CNX MIDCAP	55041	53722	54382	54729	55388	55736
CNX SMALLCAP	16970	16537	16753	16909	17126	17282
INDIA VIX	15.96	11.43	13.69	15.11	17.37	18.79

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 24-04-2025

RBLBANK

TECHNICAL VIEWS



NIFTY

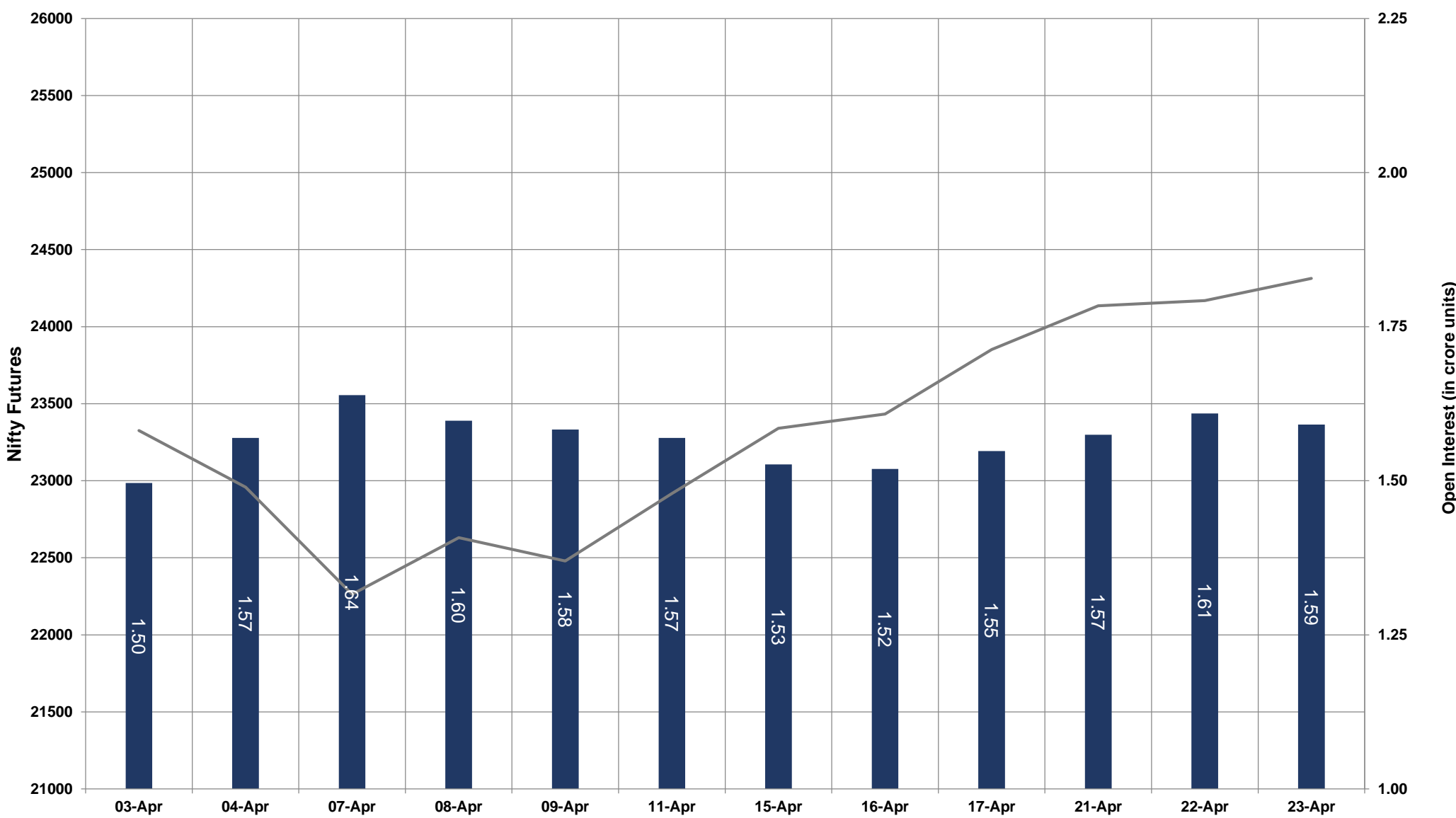


- Nifty Cash = **24328.95 (0.67%)**
- Resistance levels = **24500** and **24650**
- Support levels = **24000** and **23850**

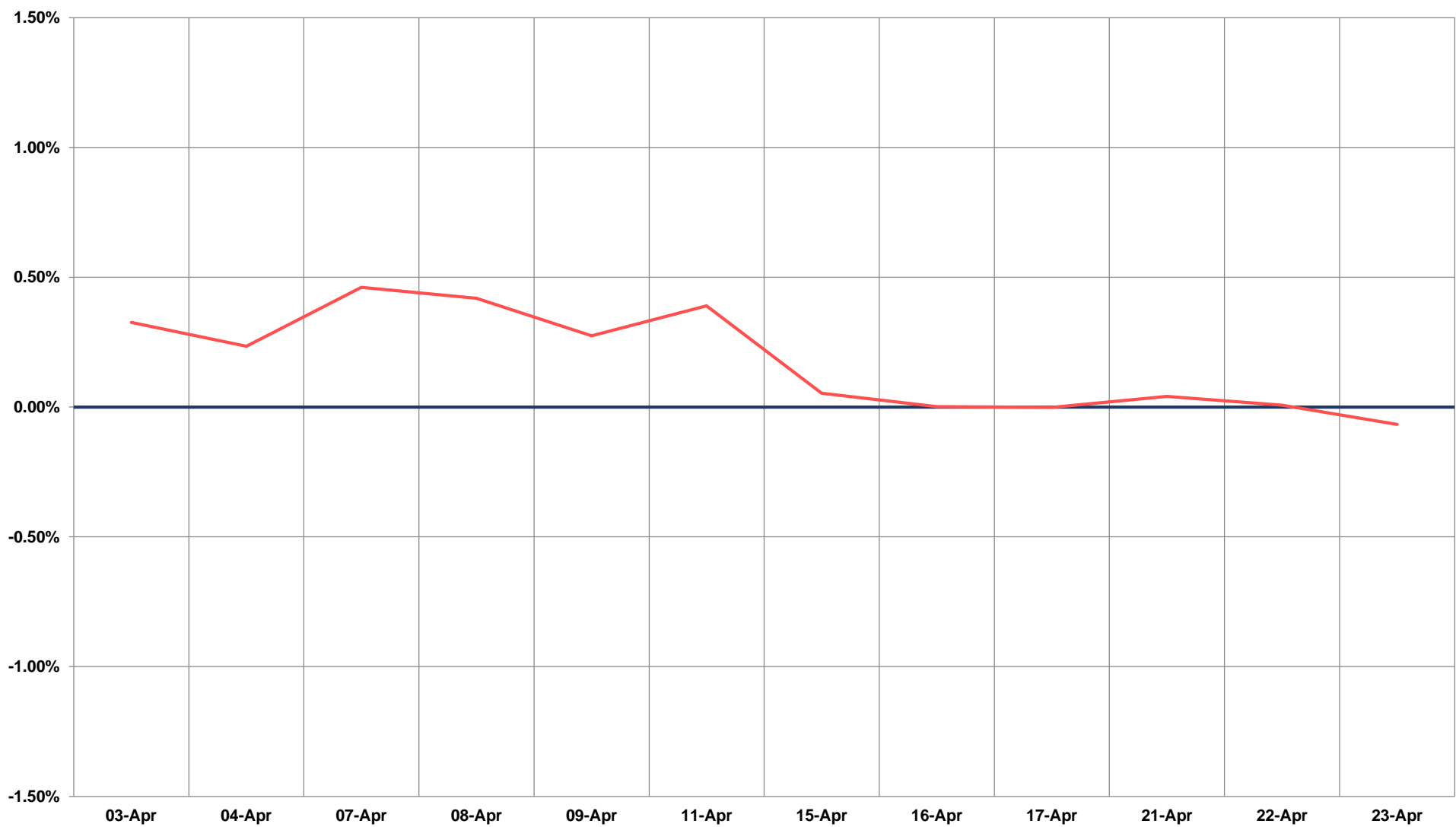
TECHNICAL VIEWS



NIFTY FUTURES



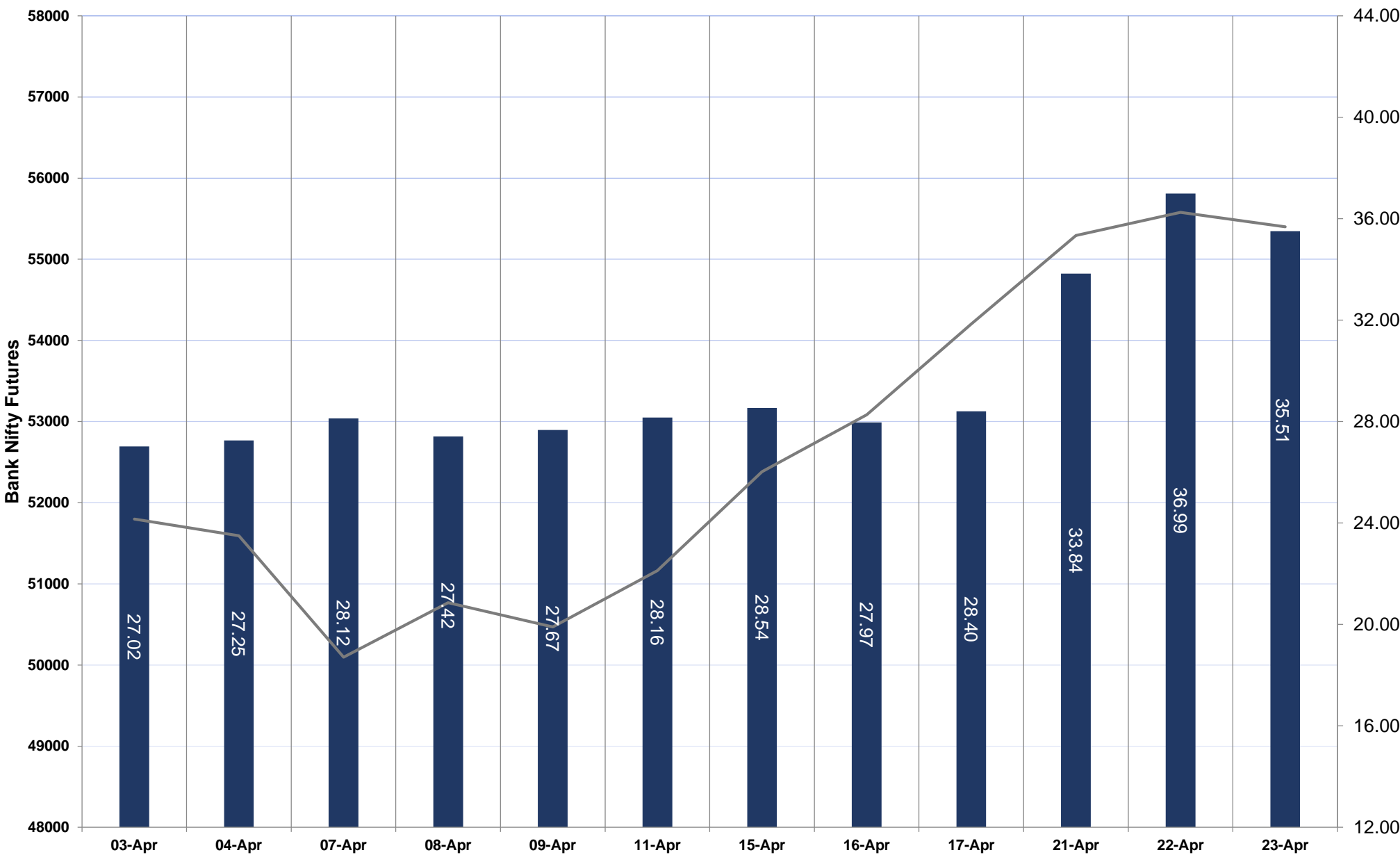
SPREAD: FUTURE & SPOT



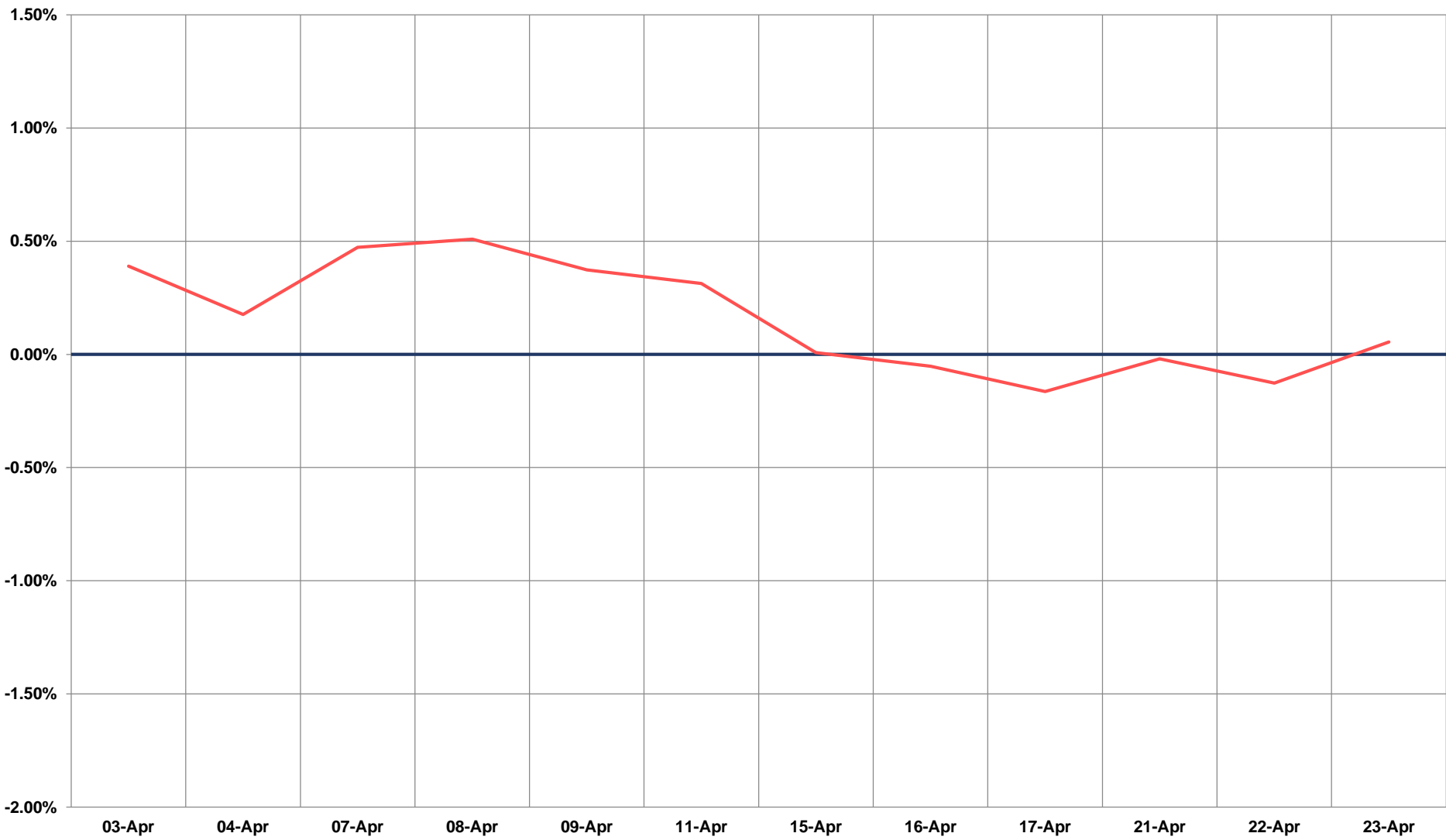
TECHNICAL VIEWS



BANK NIFTY FUTURES



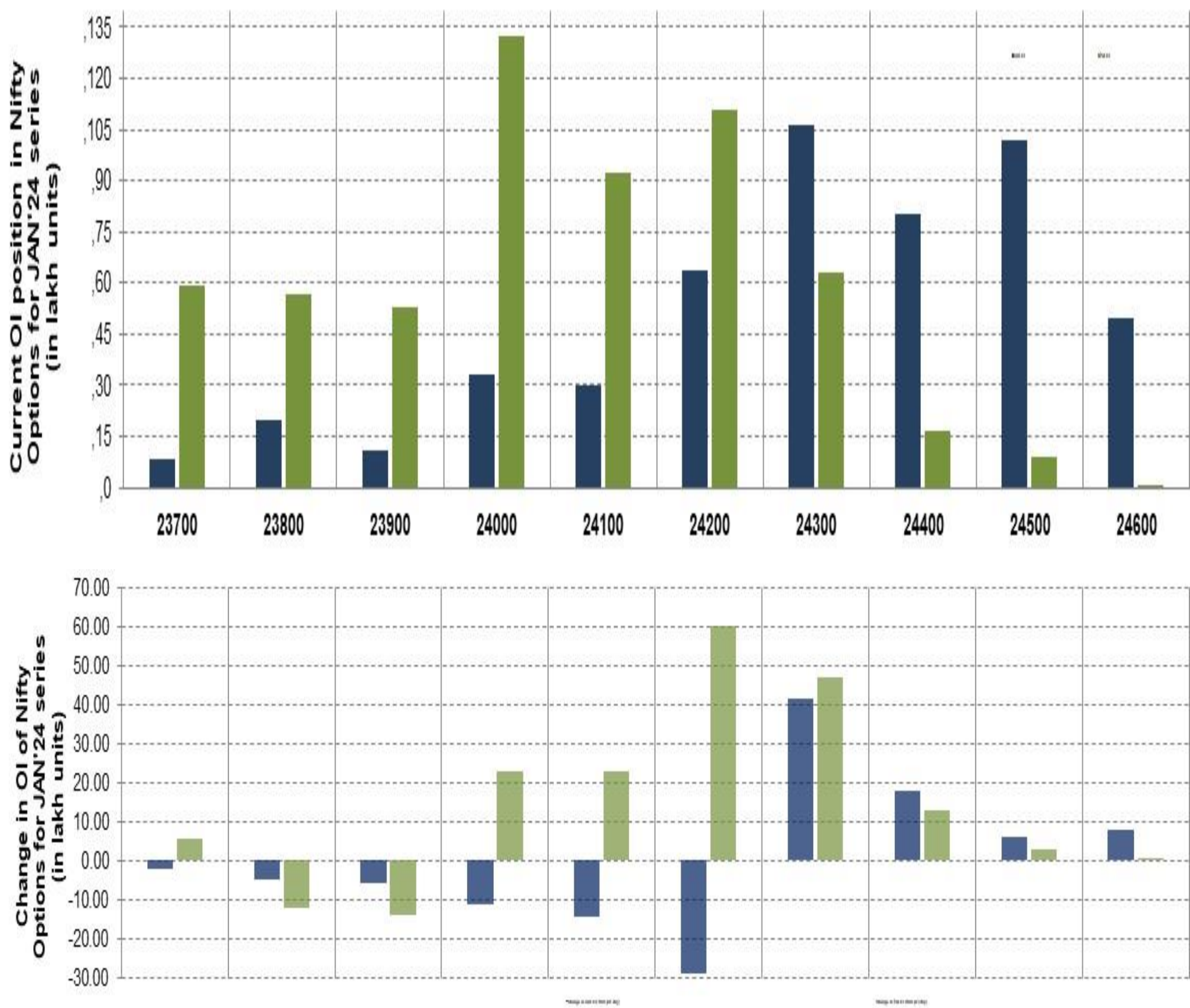
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 4.14 million in Open Interests is **Strike Price of 24300**
- **Most Active Nifty Put** with an addition of 6.00 millions in Open Interests is **Strike Price of 24200**
- **Maximum Open Interest an outstanding** was 10.63 millions for Calls at **Strike Price of 24300**
- **Maximum Open Interest an outstanding** was 13.23 millions for puts at **Strike Price of 24000**

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