



MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

APR 25, 2025



Indian equity markets erased initial gains to end in negative territory on Friday, weighed down by escalating geopolitical tensions and mixed corporate earnings. Indices made a positive start supported by broadly positive cues from global markets and continued FII inflows. However, markets slipped into the deep red and remained under pressure for the rest of the day, as sentiment turned cautious amid rising geopolitical concerns following a deadly terrorist attack on tourists in Kashmir.

Some of the important factors in trade:

India-Pakistan trade will come to complete halt: Traders took a note of Federation of Indian Export Organisations' (FIEO) statement that with Pakistan suspending all trade ties with India, including that routes through third countries, the two-way commerce will now come to a complete halt.

India likely to be first to sign trade deal: Traders paid no heed towards report that US Treasury Secretary Scott Bessent said that he expects India to strike the first bilateral trade deal to avoid President Donald Trump's reciprocal tariffs.

Traders overlooked FIIs inflow: Traders overlooked exchange data showed that Foreign Institutional Investors (FIIs) bought equities worth Rs 8,250.53 crore on Thursday.

Global front: European markets were trading in green as easing Sino-U.S. trade tensions and some upbeat corporate earnings helping underpin investors sentiment. Asian markets ended mostly in green after comments by a Federal Reserve official bolstered odds that the central bank will cut interest rates as early as June.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	79212.53	-588.90	-0.74
NIFTY	24039.35	-207.35	-0.86
MIDCAP	42528.71	-1061.78	-2.44
SMLCAP	48005.62	-1261.81	-2.56
BSEFMC	20539.12	-174.42	-0.84
HEALTHCARE	41884.76	-1044.99	-2.43
AUTO	49250.85	-861.33	-1.72
POWER	6689.17	-190.34	-2.77
REALTY	6661.18	-196.80	-2.87
BSE IT	34880.35	76.90	0.22
BANKEX	62247.98	-758.78	-1.20
OIL GAS	25746.71	-484.40	-1.85
METAL	29001.40	-555.64	-1.88
INDIA VIX	17.16	0.91	5.60

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	572	2364	21
BSE	719	3246	119

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	7757	5930	31
NSE CASH	113850	108502	5
NSE F&O	245250	345780	(29)

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	21.72	3.56	1.29
SENSEX	22.08	4.08	1.15

KEY NUMBERS TRACKER



FII – DII ACTIVITY IN CASH SEGMENT (₹ in Crs)			
FII-DII*	Buy	Sell	Net
DII	16171	12631	3540
FII	15524	12572	2952

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)			
FII	Buy	Sell	Net
Index Futures	6969.88	8642.22	(1672)
Index Options	1199492.20	1258851.33	(59359)
Stock Futures	29133.57	27231.86	1902
Stock Options	59055.18	60800.59	(1745)

PUT-CALL RATIO		
Index	Current	Previous
NIFTY	0.88	0.90
BANK NIFTY	1.03	1.10

DOLLAR INDEX			
Dollar Index	Current	Previous	% Change
DXY	99.58	99.28	0.30

10-YEARS G-SEC YIELD			
Country	Current	Previous	% Change
INDIA	6.365	6.322	0.68
USA	4.281	4.305	-0.56

KEY COMMODITIES TRACKER (in \$)			
Commodity	Current	Change Points	% Change
Gold	3291.44	-57.40	-1.72
Silver	33.24	-0.36	-1.10
Crude-Oil	67.95	-0.84	-1.34
Brent-Crude	65.66	-0.89	-1.34

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES

Expiry	Close	Change Points	% Change
28 APR-25 USD-INR	85.44	0.12	0.14
28 APR-25 EUR-INR	97.10	-0.06	-0.06
28 APR-25 GBP-INR	113.72	0.08	0.07
28 APR-25 JPY- INR	59.61	-0.39	-0.65

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS

Index	Close	S2	S1	Pivot	R1	R2
NIFTY	24039	23567	23803	24084	24321	24602
SENSEX	79213	77791	78502	79316	80027	80841
NIFTY FUTURES	24139	23672	23906	24208	24442	24744
BANK NIFTY	54664	53556	54110	54730	55284	55904
CNX IT	35562	34651	35106	35524	35980	36397
CNX MIDCAP	53570	51869	52720	53967	54817	56065
CNX SMALLCAP	16547	15933	16240	16627	16934	17321
INDIA VIX	17.16	15.23	16.19	16.89	17.85	18.55

INDEX TREND ANALYSIS

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

SECURITIES BAN IN F&O TRADES FOR 28-04-2025

	NIL
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TECHNICAL VIEWS



NIFTY

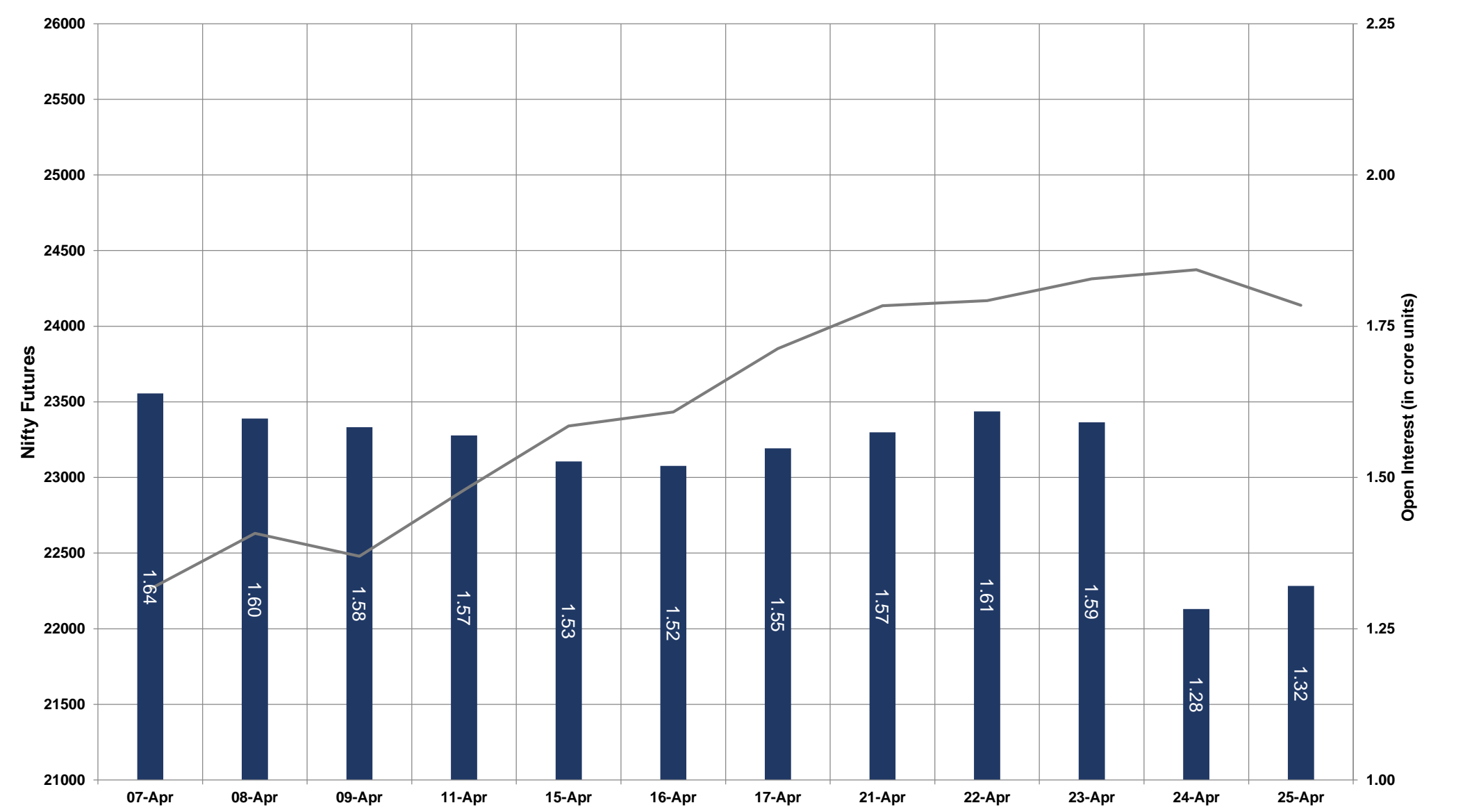


- Nifty Cash = **24039.35 (-0.86%)**
- Resistance levels = **24500** and **24650**
- Support levels = **24000** and **23850**

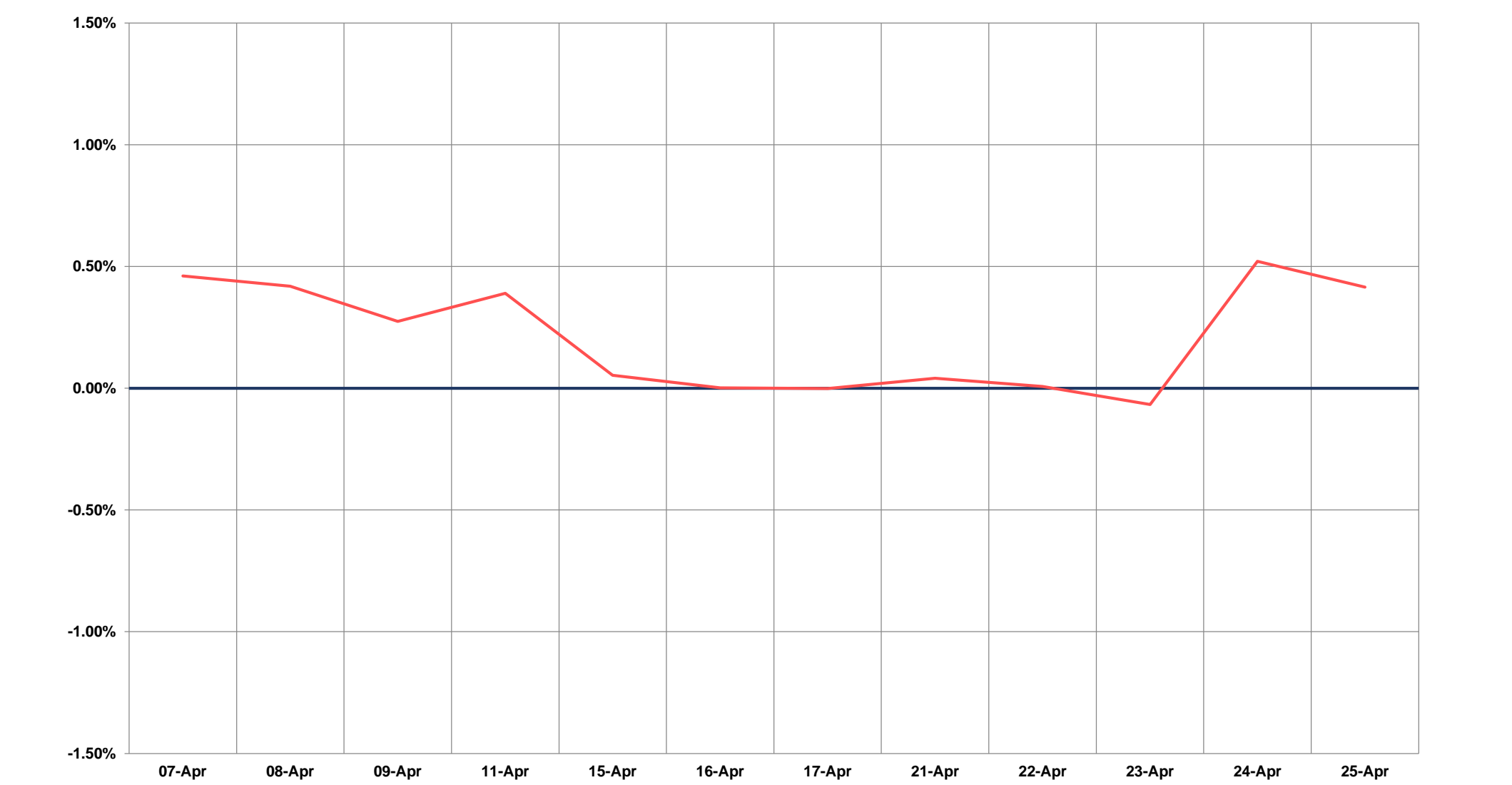
TECHNICAL VIEWS



NIFTY FUTURES



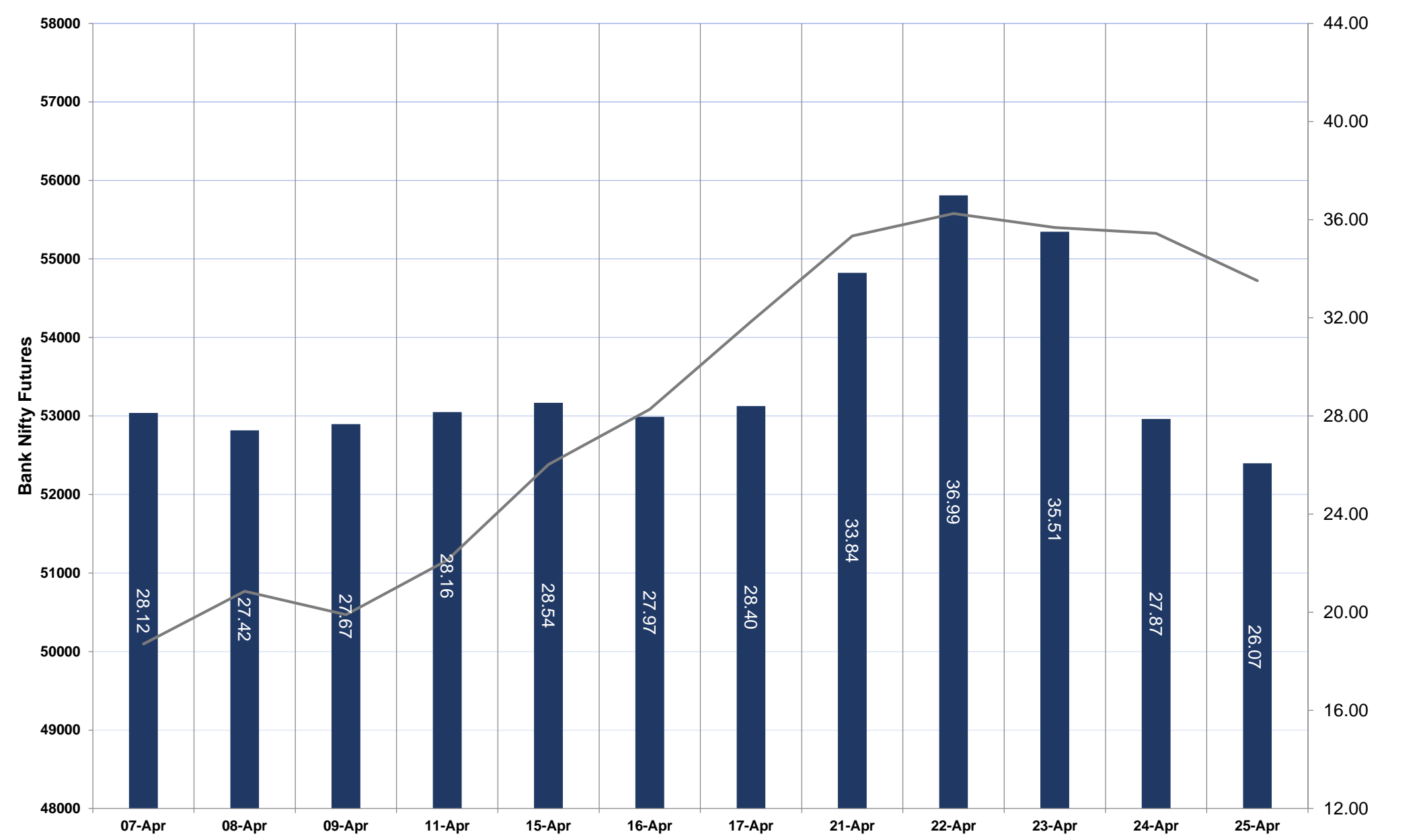
SPREAD: FUTURE & SPOT



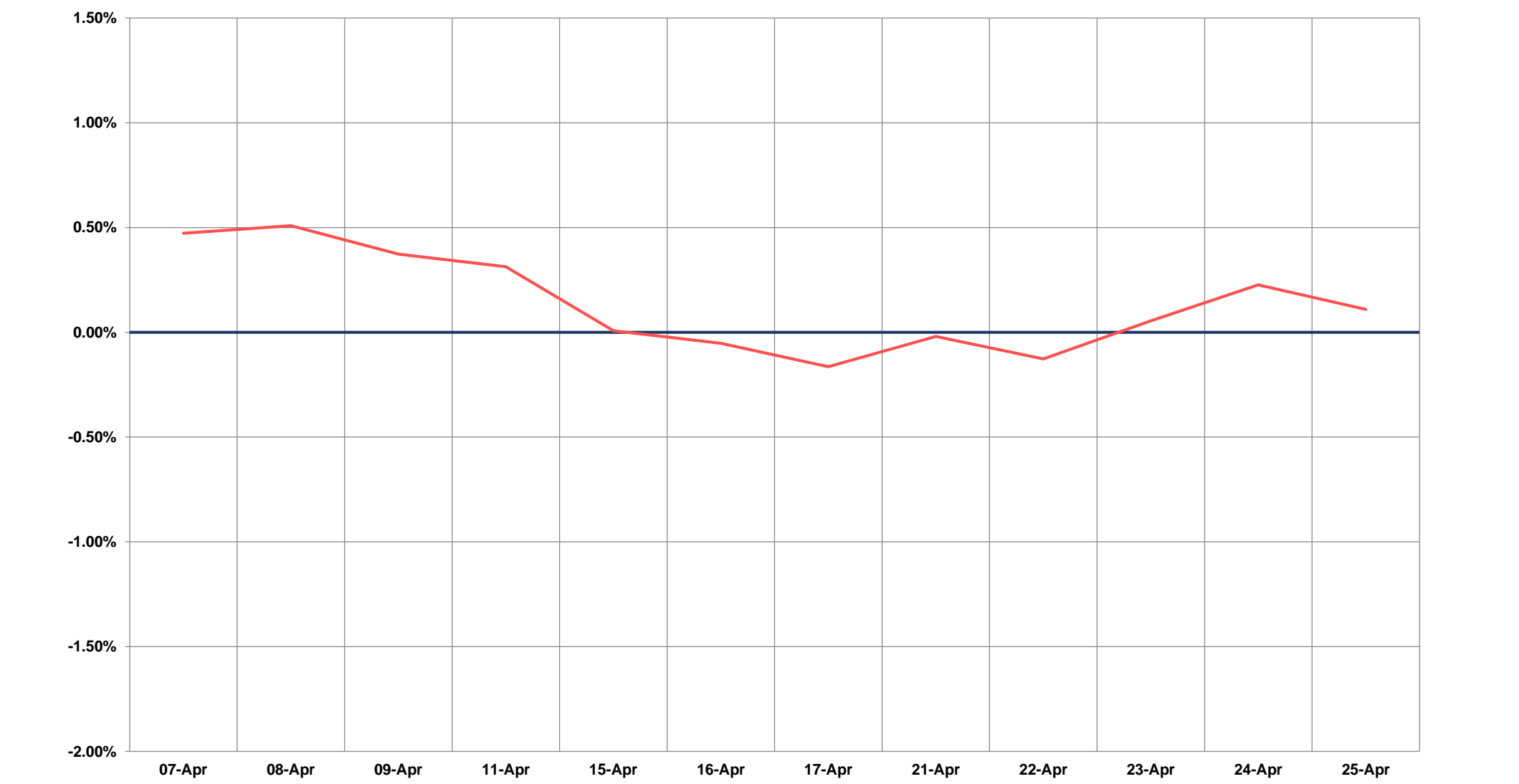
TECHNICAL VIEWS



BANK NIFTY FUTURES



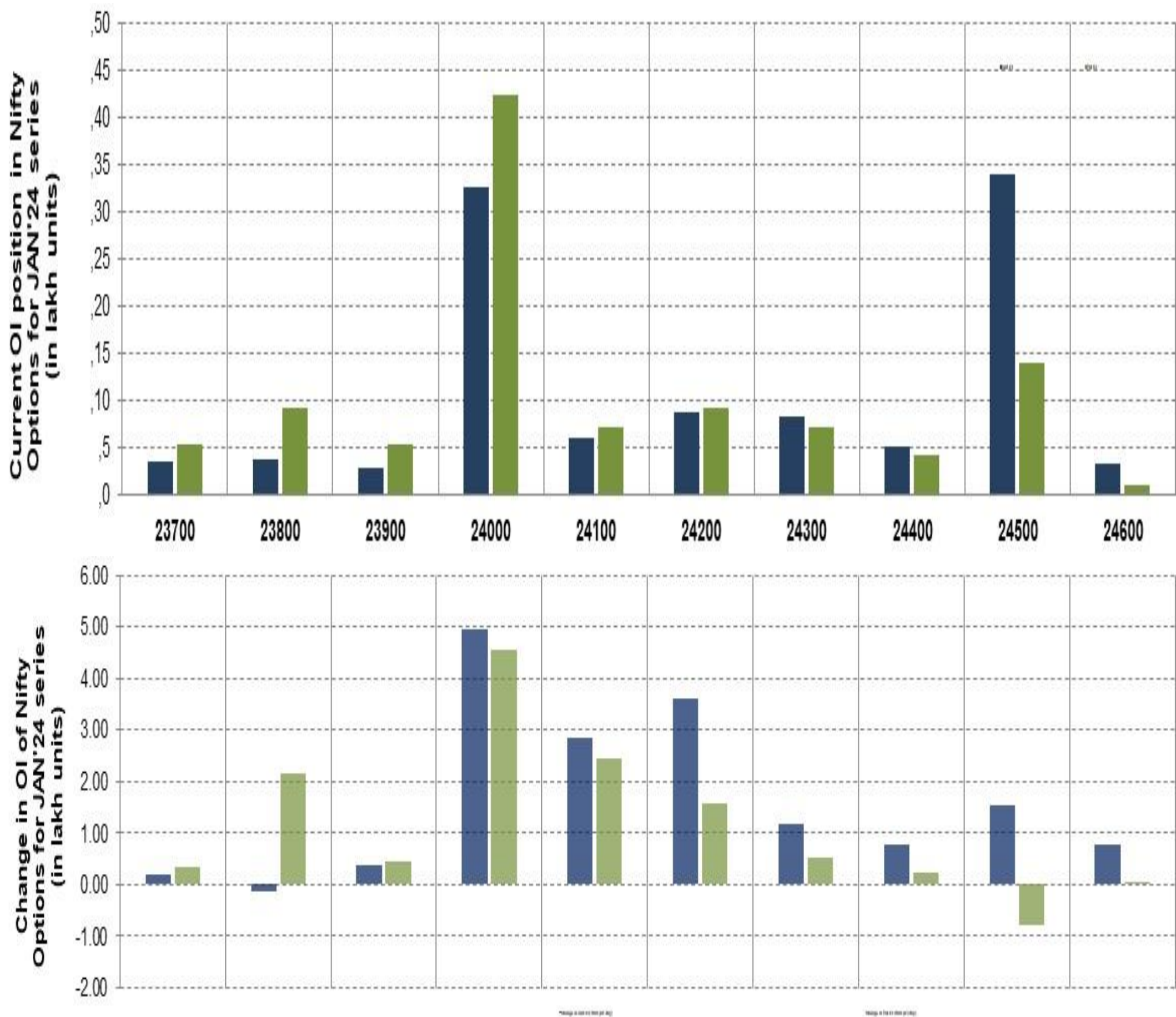
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.51 million in Open Interests is **Strike Price of 24000**
- **Most Active Nifty Put** with an addition of 0.54 millions in Open Interests is **Strike Price of 24500**
- **Maximum Open Interest an outstanding** was 3.39 millions for Calls at **Strike Price of 24500**
- **Maximum Open Interest an outstanding** was 4.22 millions for puts at **Strike Price of 24000**

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