



MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

APR 28, 2025



Indian equity markets ended near day's high points on Monday, with both the Nifty and Sensex gaining over 1% despite ongoing geopolitical tensions between India and Pakistan. After making a slightly positive start, soon markets extended their gain and remained higher throughout the day, fueled by strong quarterly earnings from Reliance Industries, robust performance across most of the banking stocks, and continued buying support from foreign institutional investors (FIIs).

Some of the important factors in trade:

India's forex reserve rises for seventh straight week: Some support came as Reserve Bank of India (RBI) said that India's foreign exchange reserves rose \$8.310 billion to \$686.145 billion in the week that ended on April 18, extending gains for the seventh straight week.

Engineering goods exports touch \$116.67 billion in FY25: Traders took support with the Engineering Exports Promotion Council (EEPC) stated that engineering goods exports from India reached its all-time high of \$116.67 billion in fiscal 2024-25, surpassing the previous high of \$112.10 billion achieved in fiscal 2021-22.

Direct tax collection grows 13.57% in FY25: Investors got support as net direct tax collection for the financial year 2024-25 has grown by 13.57 per cent to over Rs 22.26 lakh crore.

Global front: European markets were trading in green ahead of a slew of earnings announcements, and some crucial economic data due this week. Asian markets ended mostly in green as optimism about an improvement in U.S.-China trade relations also appears to be supporting the market.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	80218.37	1005.84	1.27
NIFTY	24328.50	289.15	1.20
MIDCAP	43097.01	568.30	1.34
SMLCAP	48193.46	187.84	0.39
BSEFMC	20575.78	36.66	0.18
HEALTHCARE	42555.65	670.89	1.60
AUTO	50062.00	811.15	1.65
POWER	6758.19	69.02	1.03
REALTY	6755.28	94.10	1.41
BSE IT	34850.67	-29.68	-0.09
BANKEX	63197.89	949.91	1.53
OIL GAS	26493.02	746.31	2.90
METAL	29461.13	459.73	1.59
INDIA VIX	16.94	-0.22	-1.28

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1738	1220	37
BSE	1914	2091	174

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	21.97	3.60	1.29
SENSEX	22.36	4.13	1.16

KEY NUMBERS TRACKER



FII – DII ACTIVITY IN CASH SEGMENT (₹ in Crs)			
FII-DII*	Buy	Sell	Net
DII	14436	11619	2818
FII	11680	9206	2474

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)			
FII	Buy	Sell	Net
Index Futures	4843.22	2632.71	2211
Index Options	1166856.62	1175751.30	(8895)
Stock Futures	24029.12	18784.35	5245
Stock Options	46348.81	47348.39	(1000)

PUT-CALL RATIO		
Index	Current	Previous
NIFTY	1.21	0.88
BANK NIFTY	1.03	1.03

DOLLAR INDEX			
Dollar Index	Current	Previous	% Change
DXY	99.58	99.68	-0.11

10-YEARS G-SEC YIELD			
Country	Current	Previous	% Change
INDIA	6.396	6.363	0.52
USA	4.286	4.266	0.47

KEY COMMODITIES TRACKER (in \$)			
Commodity	Current	Change Points	% Change
Gold	3292.02	-56.79	-1.70
Silver	33.00	-0.60	-1.80
Crude-Oil	62.98	-0.04	-0.06
Brent-Crude	66.82	-0.05	-0.07

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES				
Expiry		Close	Change Points	% Change
28 APR-25	USD-INR	85.25	-0.41	-0.48
28 APR-25	EUR-INR	96.81	-0.50	-0.51
28 APR-25	GBP-INR	113.62	-0.23	-0.20
28 APR-25	JPY- INR	59.41	2.17	3.79

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS						
Index	Close	S2	S1	Pivot	R1	R2
NIFTY	24329	23945	24137	24246	24438	24547
SENSEX	80218	78980	79599	79961	80580	80941
NIFTY FUTURES	24453	24012	24232	24361	24581	24710
BANK NIFTY	55433	54202	54818	55198	55813	56193
CNX IT	35483	34828	35155	35417	35745	36007
CNX MIDCAP	54440	53138	53789	54132	54784	55127
CNX SMALLCAP	16677	16305	16491	16612	16798	16919
INDIA VIX	16.94	15.76	16.35	17.21	17.80	18.66

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	NEUTRAL	NEUTRAL	NEUTRAL
INDIA VIX	Buy	NEUTRAL	SELL

SECURITIES BAN IN F&O TRADES FOR 29-04-2025	
RBLBANK	

TECHNICAL VIEWS



NIFTY

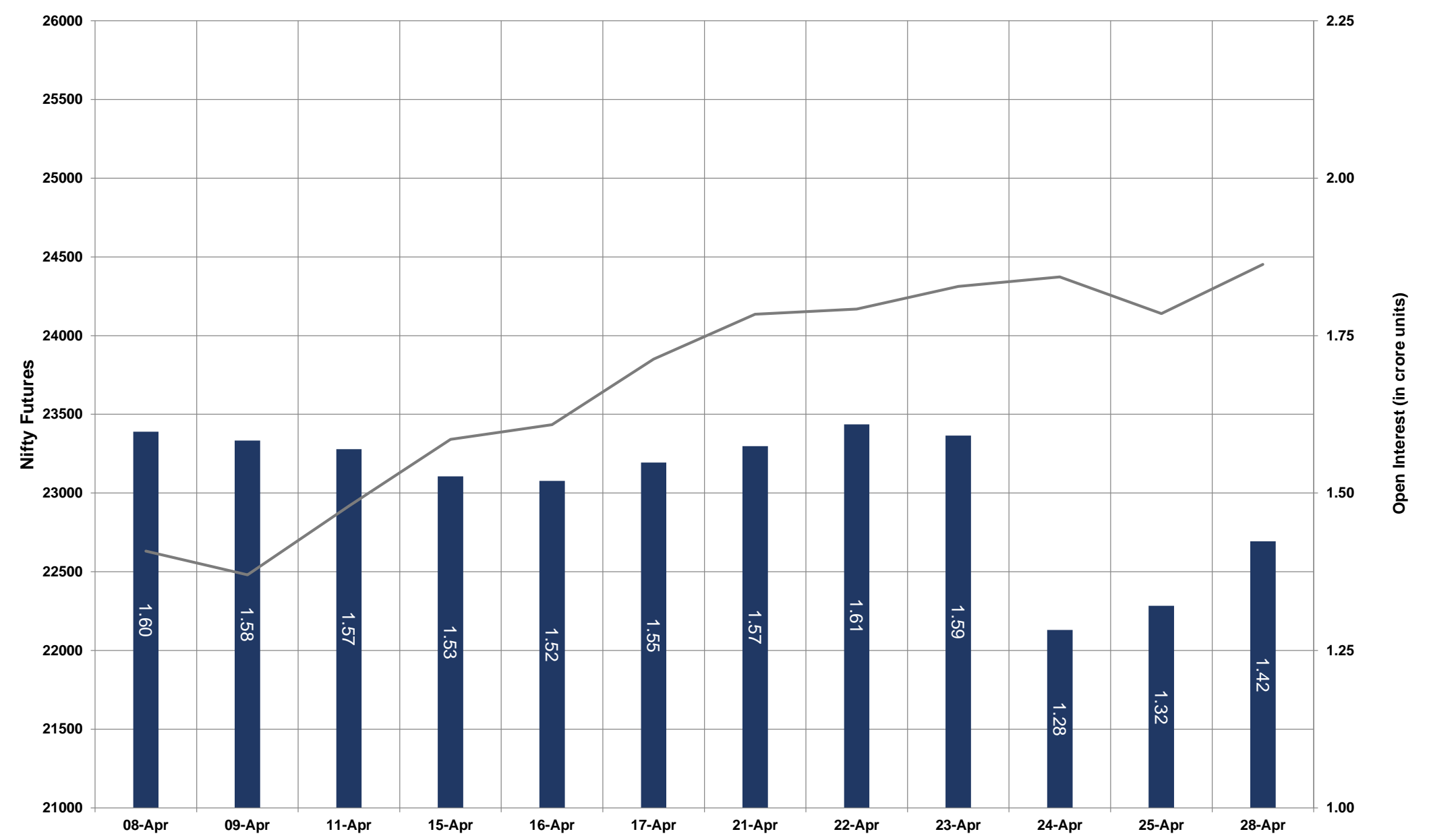


- Nifty Cash = **24328.50 (1.20%)**
- Resistance levels = **24500** and **24650**
- Support levels = **24000** and **23850**

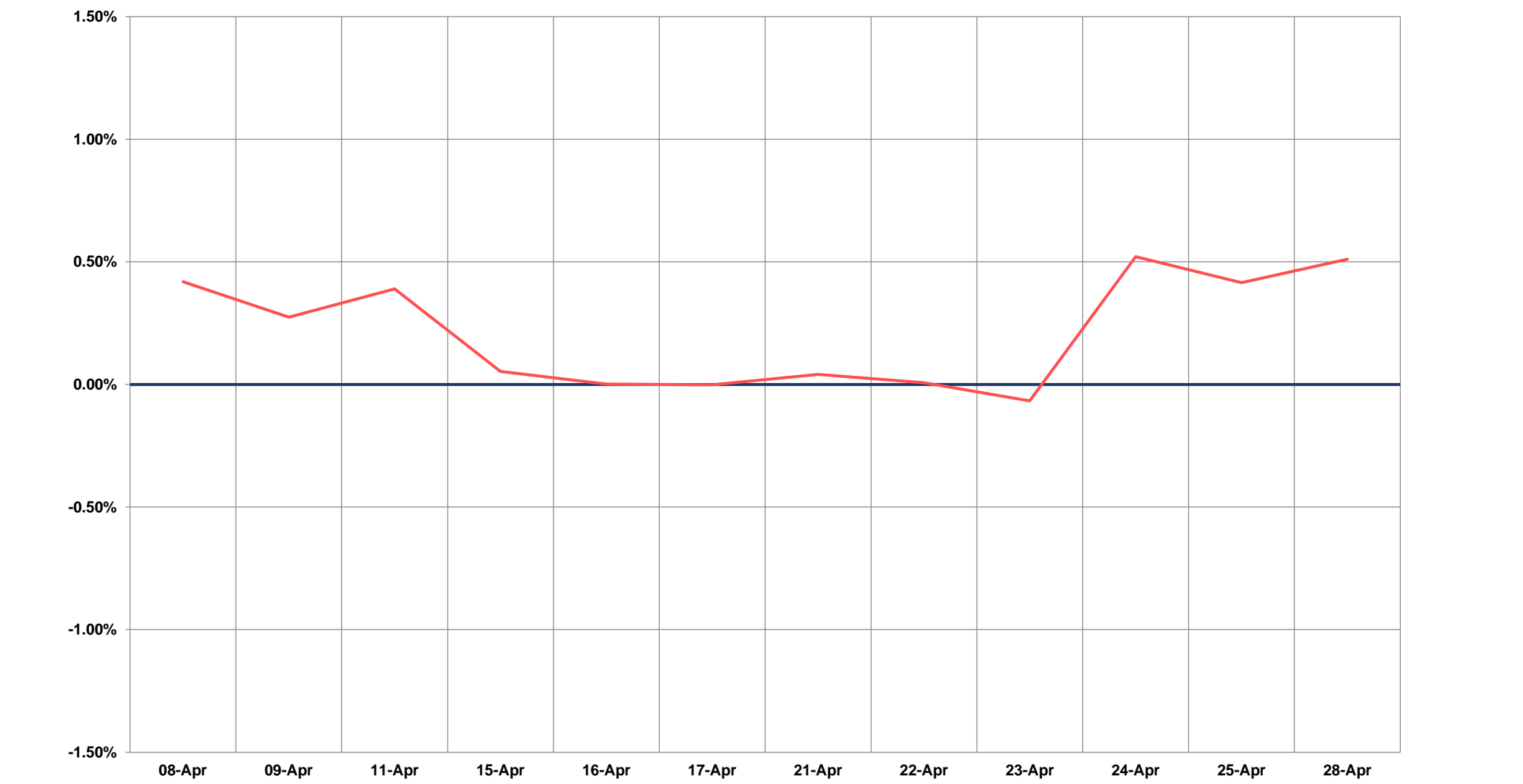
TECHNICAL VIEWS



NIFTY FUTURES



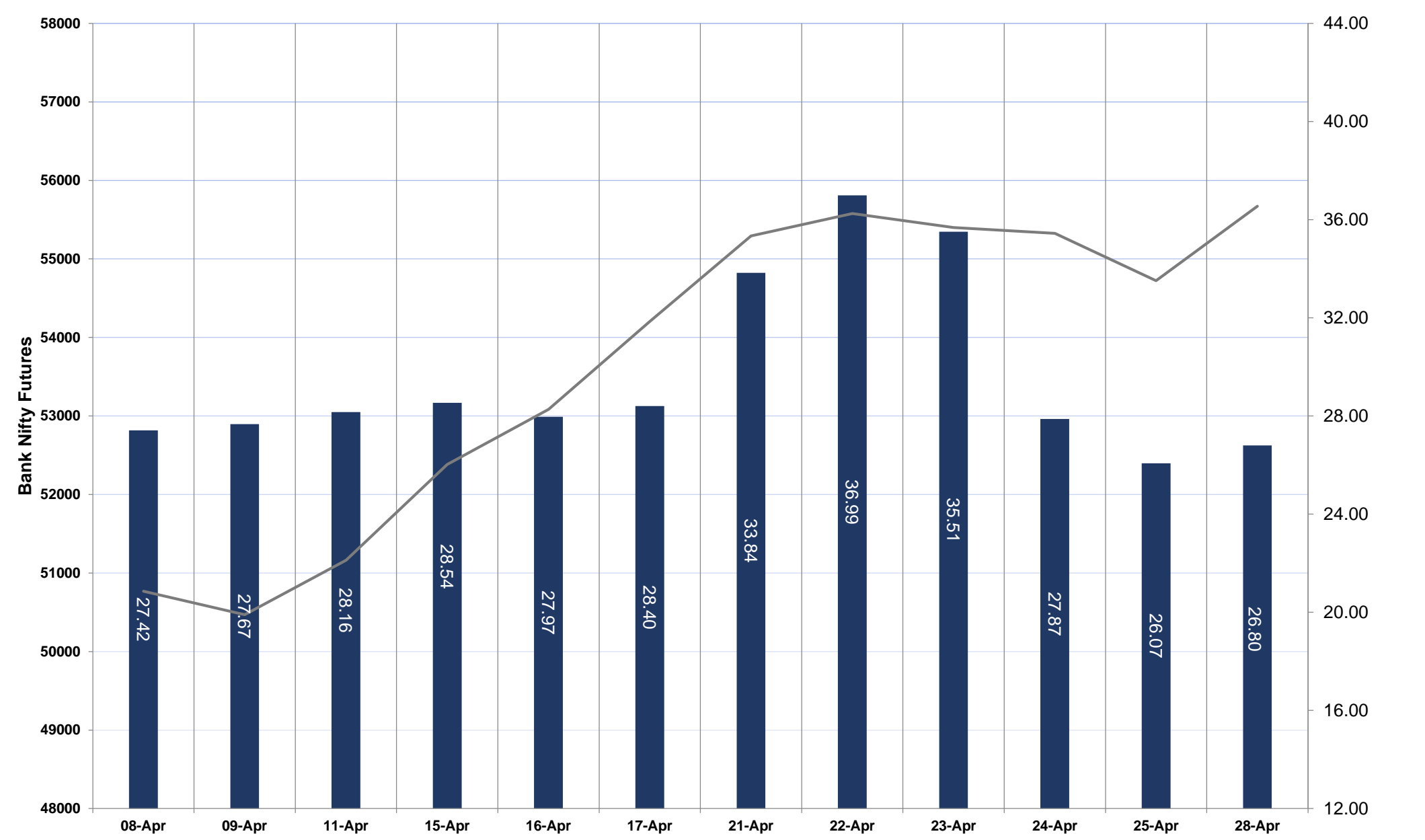
SPREAD: FUTURE & SPOT



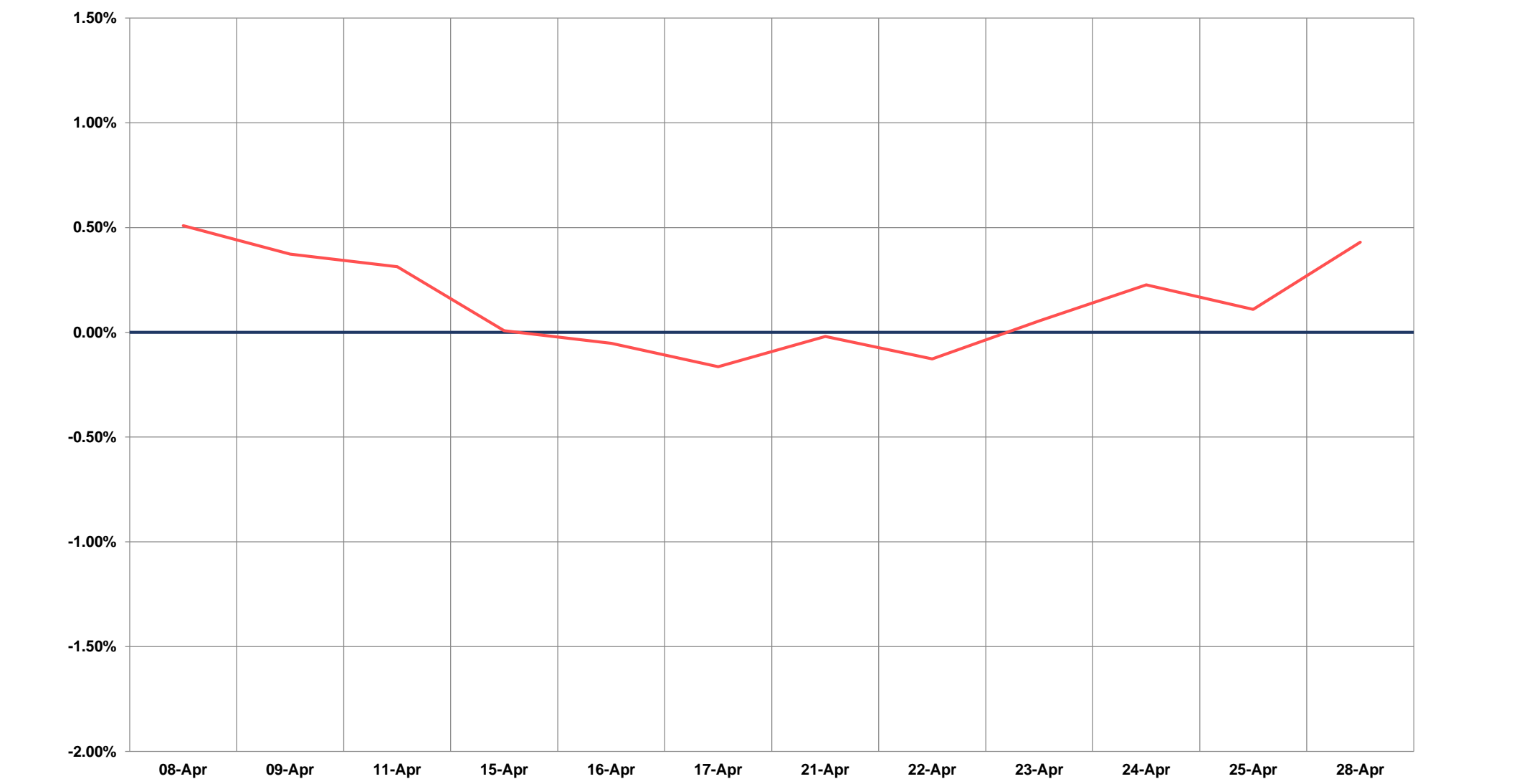
TECHNICAL VIEWS



BANK NIFTY FUTURES



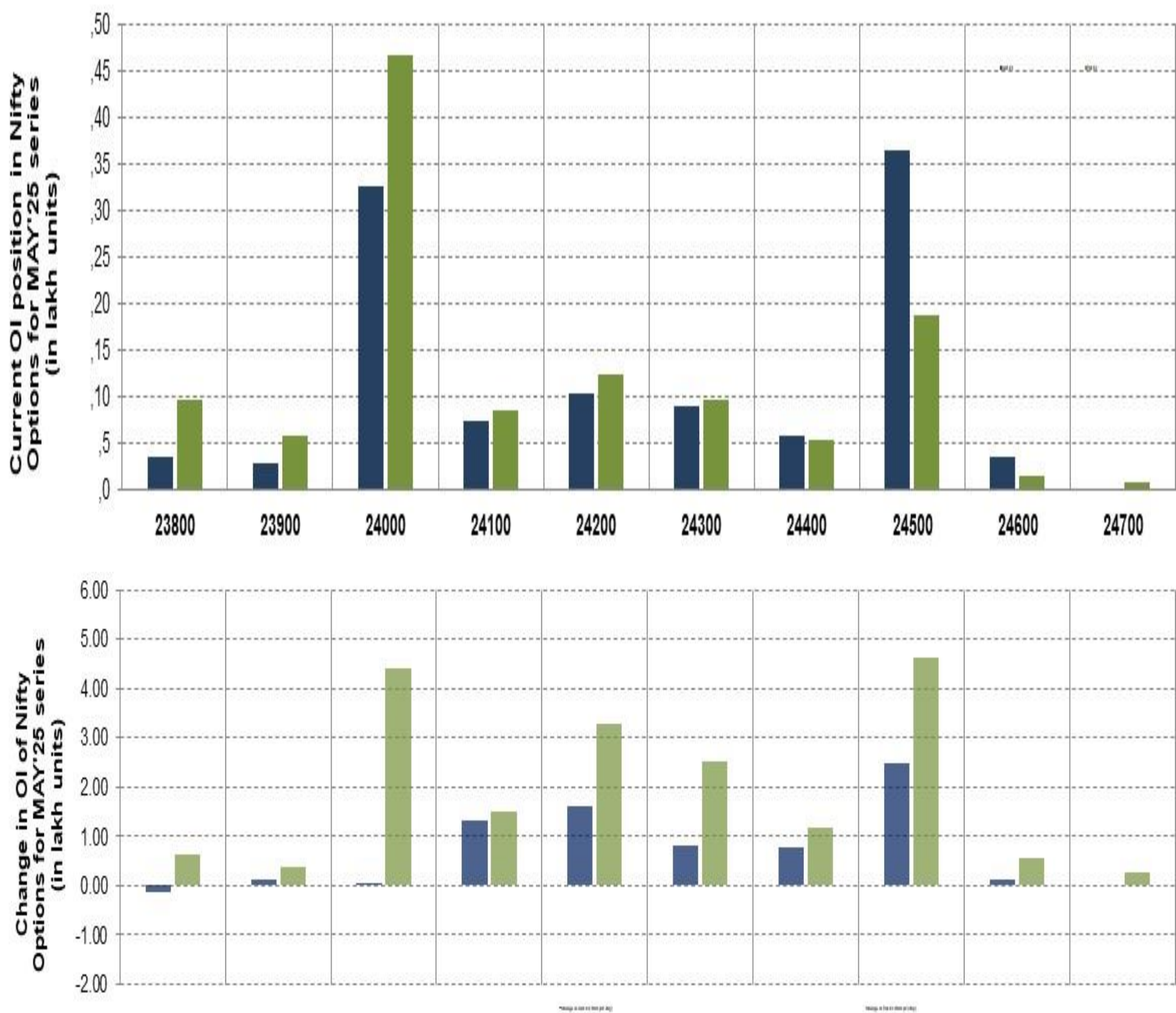
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.25 million in Open Interests is **Strike Price of 24500**
- **Most Active Nifty Put** with an addition of 0.46 millions in Open Interests is **Strike Price of 24500**
- **Maximum Open Interest an outstanding** was 3.64 millions for Calls at **Strike Price of 24500**
- **Maximum Open Interest an outstanding** was 4.66 millions for puts at **Strike Price of 24000**

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