



MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

APR 29, 2025



Indian equity markets ended flat with positive bias on Tuesday. After making a positive start, soon indices turned volatile amid ongoing global trade uncertainties and rising geopolitical tensions between India and Pakistan, which dampened investors sentiment. However, in afternoon session, markets added some gains but ended near neutral lines as traders paid no attention towards the Reserve Bank has vowed to inject additional liquidity into the system in the month of May.

Some of the important factors in trade:

India's IIP growth rises marginally to 3%: Sentiments were upbeat with data showing India's industrial production growth marginally accelerated to 3 per cent in March 2025 from 2.7 per cent in February.

FII's buying spree continues: Traders took some support as exchange data showed that Foreign Institutional Investors (FIIs) bought equities worth Rs 2,474.10 crore on Monday.

Climate change may lead to increased probability of defaults: Some concern came as RBI deputy governor M Rajeshwar Rao stated that climate change would lead to additional operational costs for borrowers with an increased possibility of a loss of their assets, leading to an increased probability of default by borrowers.

Global front: European markets were trading in green after reports emerged that the U.S. would move to reduce the impact of duties imposed on foreign parts in domestically manufactured cars. Asian markets ended mostly in green as U.S. Treasury Secretary Scott Bessent put the burden for trade progress squarely on China, increasing confusion about the status of talks between the two countries.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	80288.39	70.02	0.09
NIFTY	24335.95	7.45	0.03
MIDCAP	43194.16	97.15	0.23
SMLCAP	48238.69	45.23	0.09
BSEFMC	20519.42	-56.36	-0.27
HEALTHCARE	42211.90	-343.75	-0.81
AUTO	49931.34	-130.66	-0.26
POWER	6707.51	-50.68	-0.75
REALTY	6743.12	-12.16	-0.18
BSE IT	35243.27	392.60	1.13
BANKEX	62981.74	-216.15	-0.34
OIL GAS	26489.95	-3.07	-0.01
METAL	29170.18	-290.95	-0.99
INDIA VIX	17.37	0.43	2.54

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1516	1395	37
BSE	1830	2095	129

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	7562	5643	34
NSE CASH	102697	90099	14
NSE F&O	147403	172089	(14)

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	21.94	3.60	1.29
SENSEX	22.38	4.13	1.16

KEY NUMBERS TRACKER



FII – DII ACTIVITY IN CASH SEGMENT (₹ in Crs)			
FII-DII*	Buy	Sell	Net
DII	13356	11987	1369
FII	15674	13289	2386

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)			
FII	Buy	Sell	Net
Index Futures	3707.23	2796.55	911
Index Options	1273258.71	1284748.84	(11490)
Stock Futures	17058.17	17274.33	(216)
Stock Options	47476.42	47721.30	(245)

PUT-CALL RATIO		
Index	Current	Previous
NIFTY	0.94	1.21
BANK NIFTY	0.95	1.03

DOLLAR INDEX			
Dollar Index	Current	Previous	% Change
DXY	99.29	98.94	0.35

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	3312.43	-24.71	-0.73
Silver	33.28	0.18	0.56
Crude-Oil	61.10	-0.95	-1.53
Brent-Crude	64.79	-1.07	-1.67

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES

Expiry	Close	Change Points	% Change
28 MAY-25 USD-INR	85.40	0.15	0.17
28 MAY-25 EUR-INR	97.27	0.44	0.45
28 MAY-25 GBP-INR	114.27	0.66	0.58
28 MAY-25 JPY- INR	59.97	0.56	0.94

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS

Index	Close	S2	S1	Pivot	R1	R2
NIFTY	24336	24195	24265	24361	24432	24528
SENSEX	80288	79818	80053	80357	80592	80897
NIFTY FUTURES	24425	24291	24358	24463	24530	24635
BANK NIFTY	55391	54842	55117	55537	55812	56232
CNX IT	35920	35091	35506	35832	36246	36572
CNX MIDCAP	54588	54129	54358	54691	54920	55252
CNX SMALLCAP	16739	16573	16656	16778	16861	16983
INDIA VIX	17.37	15.50	16.43	17.01	17.94	18.52

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	Buy	NEUTRAL	SELL

SECURITIES BAN IN F&O TRADES FOR 30-04-2025

RBLBANK

TECHNICAL VIEWS



NIFTY

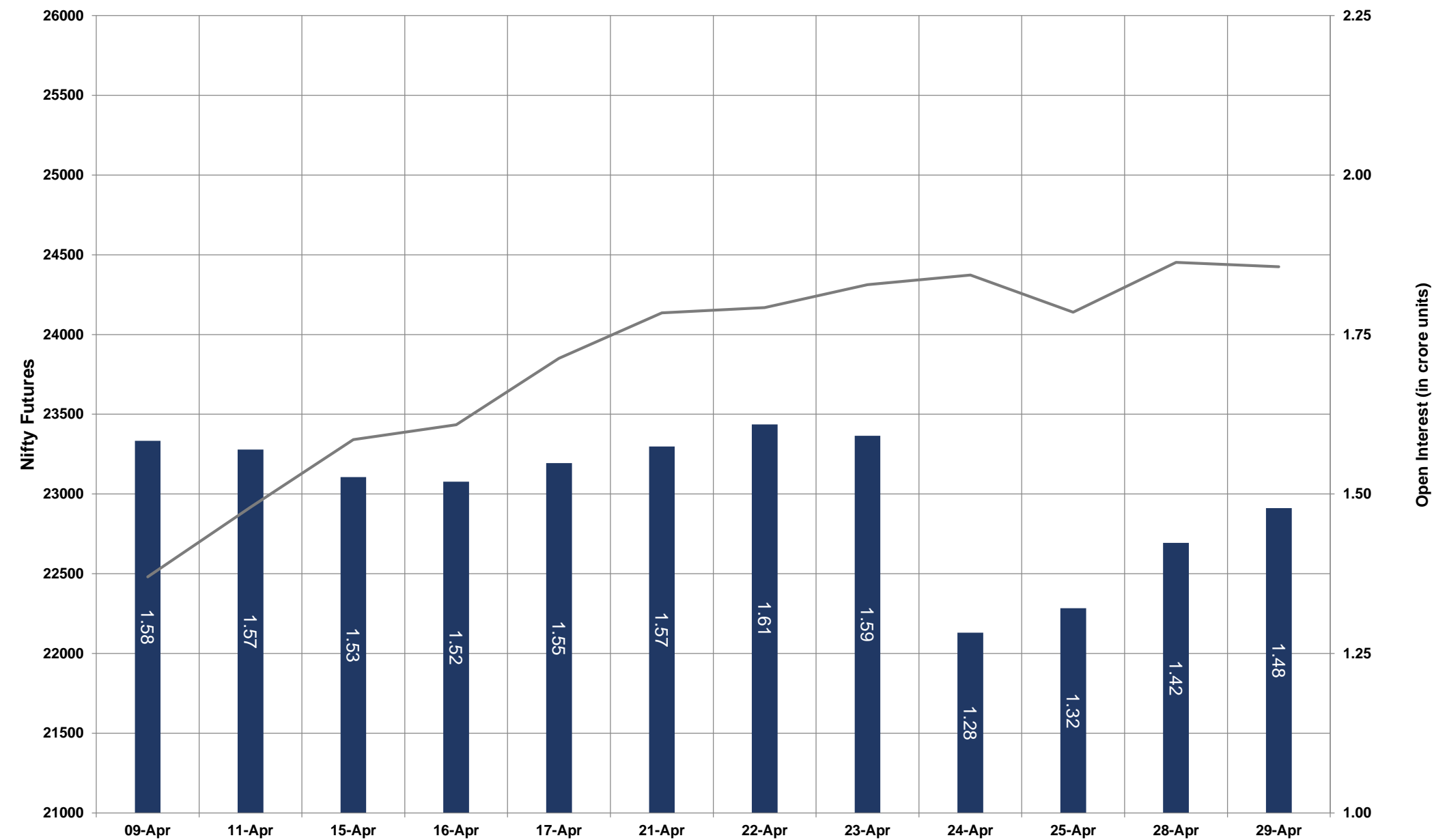


- Nifty Cash = **24335.95 (0.03%)**
- Resistance levels = **24500** and **24650**
- Support levels = **24000** and **23850**

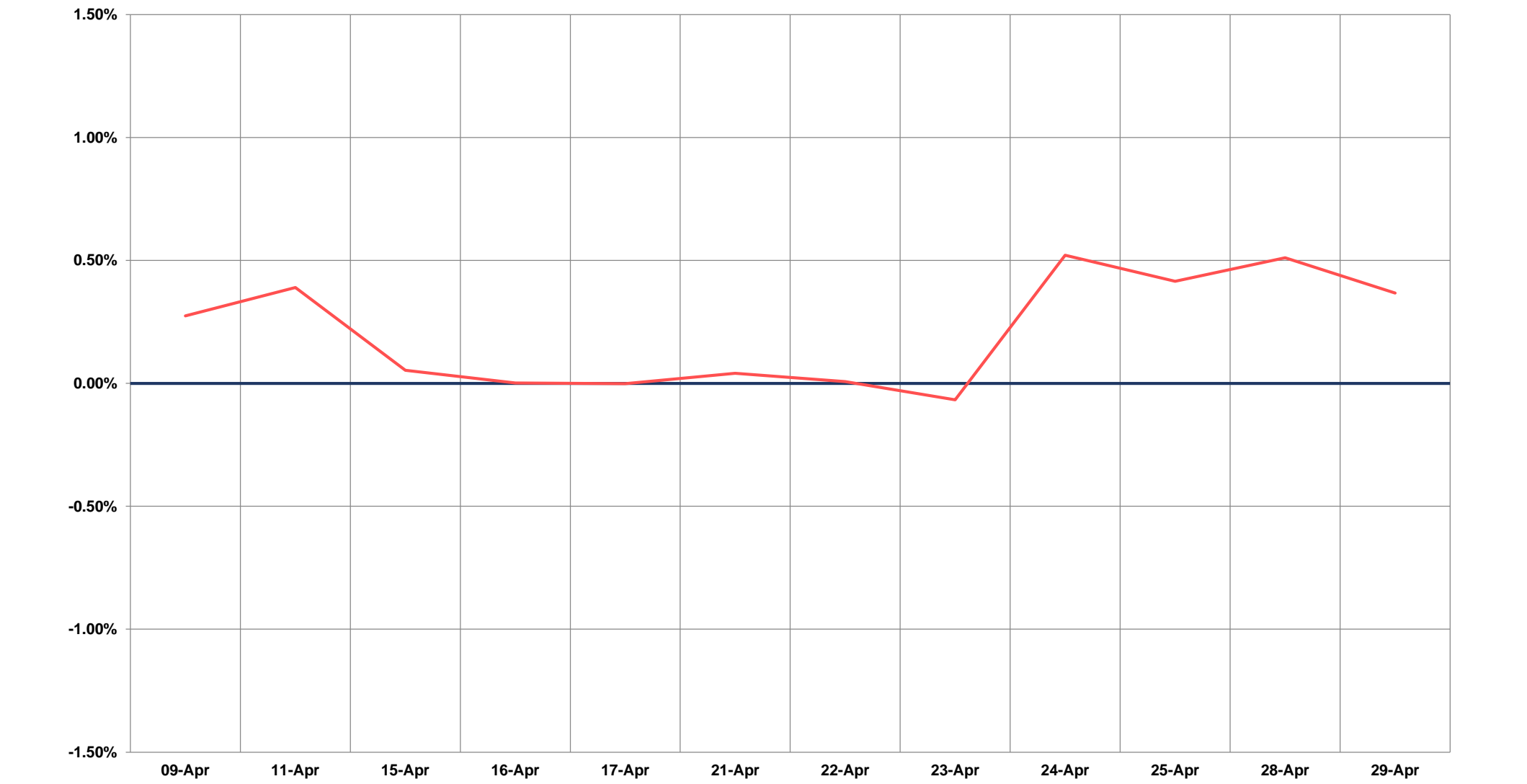
TECHNICAL VIEWS



NIFTY FUTURES



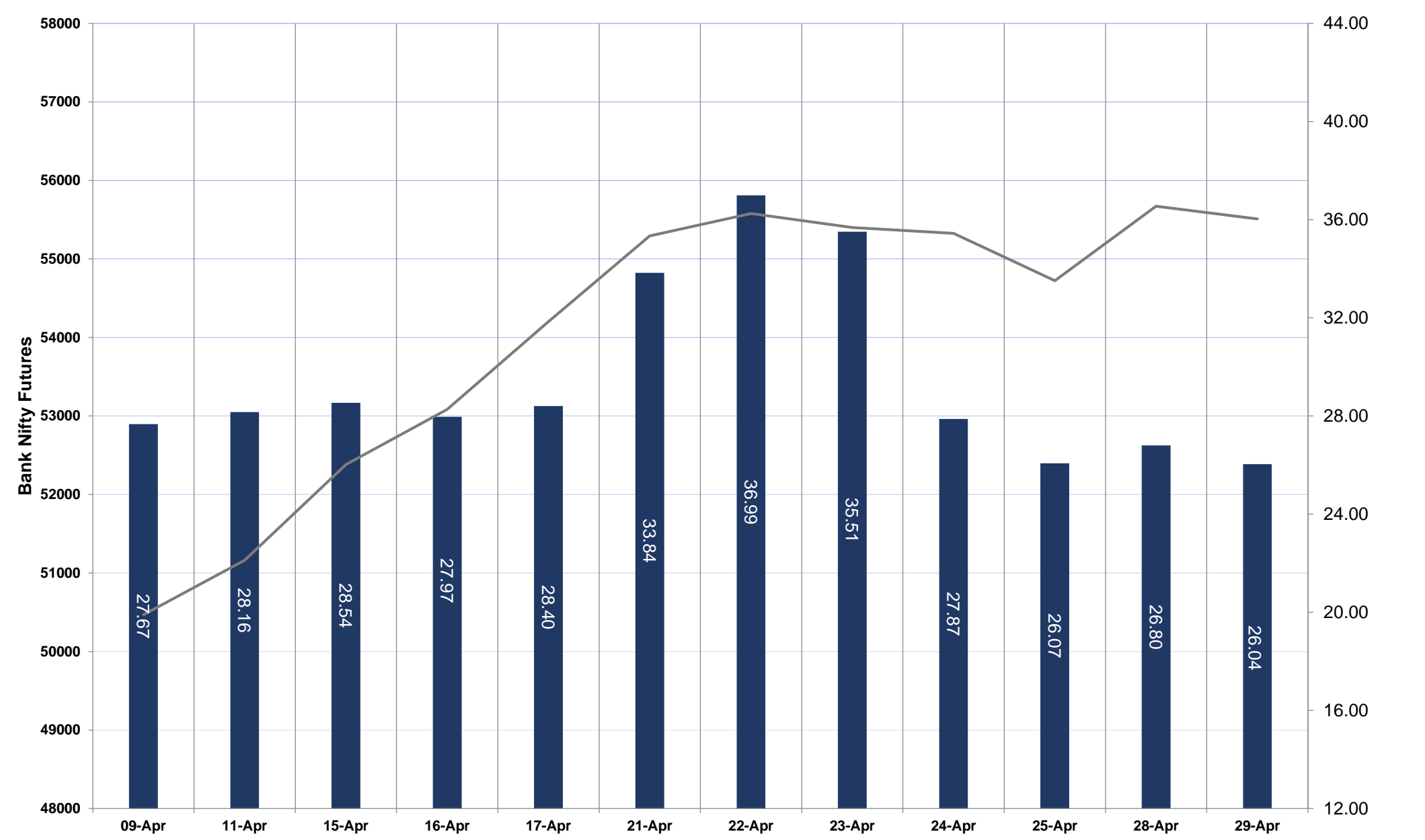
SPREAD: FUTURE & SPOT



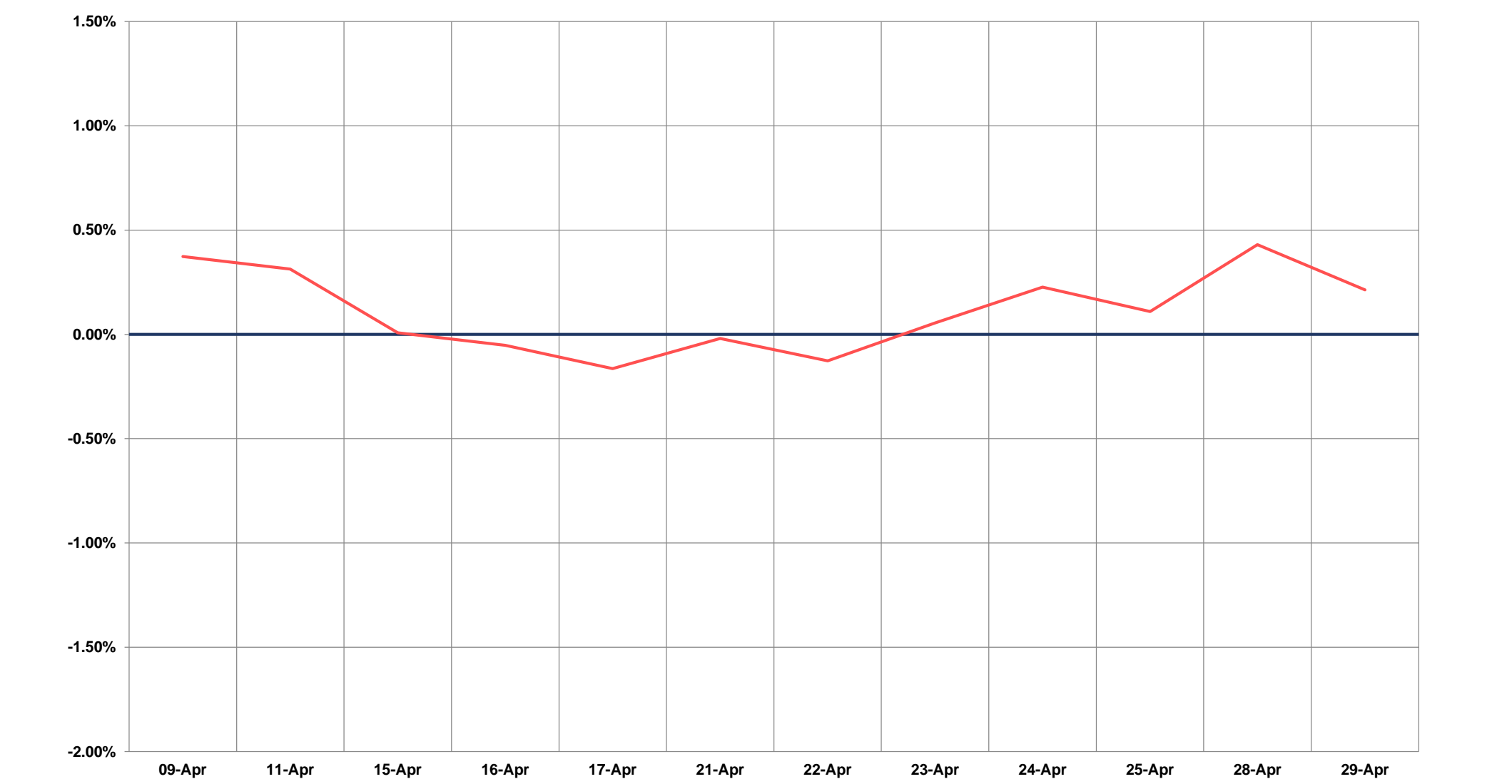
TECHNICAL VIEWS



BANK NIFTY FUTURES



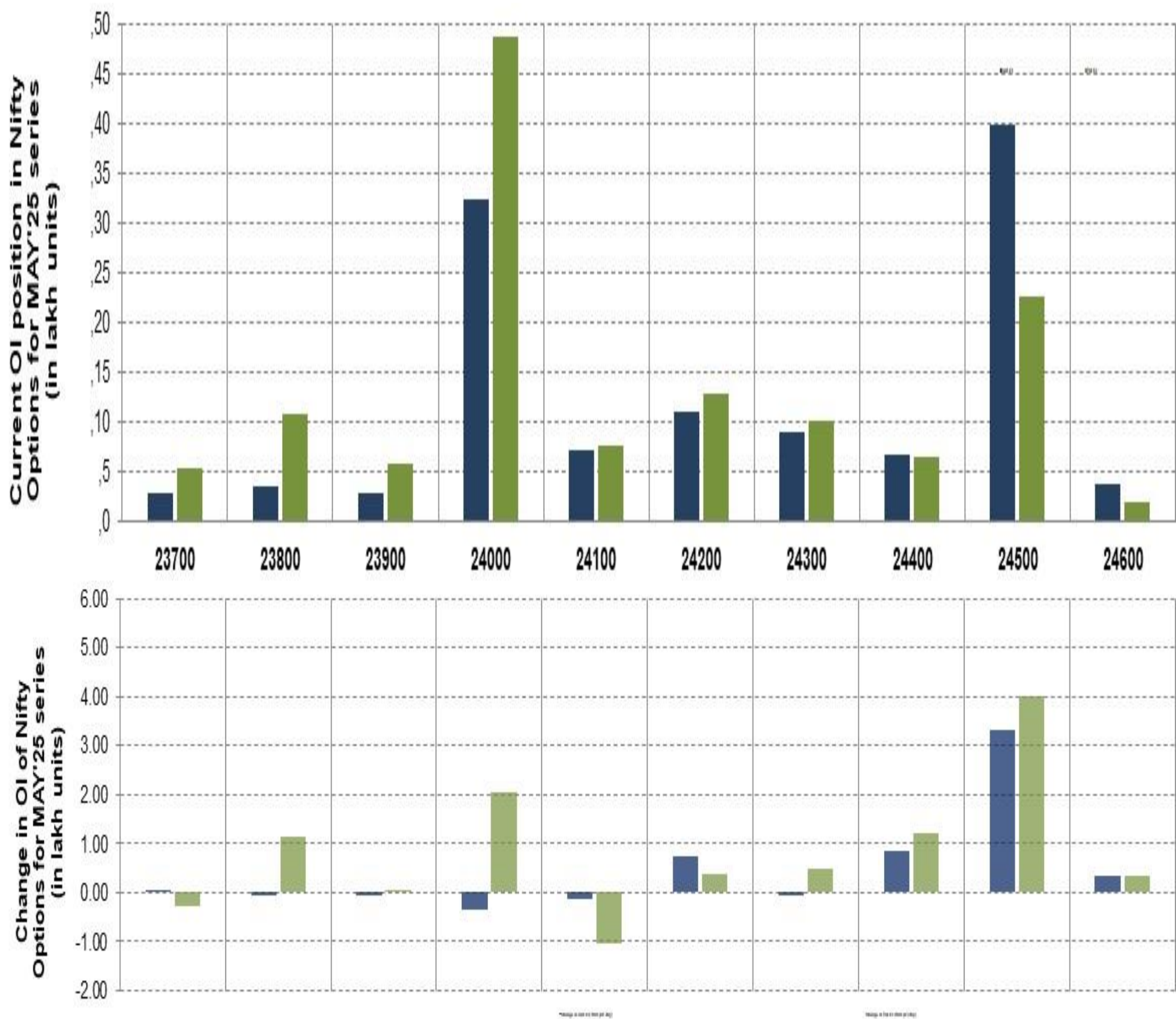
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.33 million in Open Interests is **Strike Price of 24500**
- **Most Active Nifty Put** with an addition of 0.40 millions in Open Interests is **Strike Price of 24500**
- **Maximum Open Interest** an outstanding was 3.97 millions for Calls at **Strike Price of 24500**
- **Maximum Open Interest** an outstanding was 4.86 millions for puts at **Strike Price of 24000**

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