



# MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

APR 30, 2025



Indian equity markets ended with minor losses on Wednesday, despite continued foreign fund inflows and positive cues from the U.S. markets. After making a slightly positive start, soon markets altered between red and green territory throughout the day, as traders were cautious amid escalating geopolitical tensions between India and Pakistan, triggered by the recent terror attack in Jammu and Kashmir's Pahalgam and reports of ceasefire violations at the border.

Some of the important factors in trade:

Private sector capex may decline by 25% in FY26: Traders were cautious as government survey projected that private sector capital expenditure (capex) is expected to decline by around 25% to Rs 4.88 lakh crore in FY26, down from Rs 6.56 lakh crore in FY25.

Reciprocal tariffs will exacerbate stress for MSMEs: Some concern came with India Ratings and Research (Ind-Ra) stating that reciprocal tariffs will exacerbate stress for medium, small and micro enterprises (MSMEs) but mid-sized corporates have a greater cushion against unanticipated financial shocks.

FIIs inflows in the domestic markets: Traders overlooked exchange data showed foreign investors extended their buying streak to a tenth straight session on Tuesday, April 29, purchasing Indian equities worth Rs 2,385 crore.

Global front: European markets were trading in green amid easing trade tensions, and on fairly encouraging quarterly results from big name companies. Asian markets ended mostly in green, as value of retail sales in Japan was up 3.1% on year in March. That missed expectations for an increase of 3.6% and was up from 1.3% in February. On a seasonally adjusted monthly basis, retail sales fell 1.2%.

# MARKET SELFIE



## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	80242.24	-46.14	-0.06
NIFTY	24334.20	-1.75	-0.01
MIDCAP	42883.72	-310.44	-0.72
SMLCAP	47400.31	-838.38	-1.74
BSEFMC	20453.82	-65.60	-0.32
HEALTHCARE	42211.32	-0.58	-0.00
AUTO	49960.45	29.11	0.06
POWER	6647.59	-59.92	-0.89
REALTY	6864.71	121.59	1.80
BSE IT	35050.61	-192.66	-0.55
BANKEX	62622.04	-359.70	-0.57
OIL GAS	26491.20	1.25	0.00
METAL	29050.51	-119.67	-0.41
INDIA VIX	18.22	0.85	4.89

## ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	753	2146	33
BSE	975	2938	150

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	5686	7562	(25)
NSE CASH	110088	102697	7
NSE F&O	155496	147403	5

## 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	14430	12638	1792
FII	25190	25139	51

Note: FPI & DII Figures are provisional

## FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	3993.01	2573.30	1420
Index Options	2627544.55	2601141.29	26403
Stock Futures	22952.32	19969.92	2982
Stock Options	48780.38	48545.22	235

## PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.09	0.94
BANK NIFTY	0.94	0.95

## DOLLAR INDEX

Dollar Index	Current	Previous	% Change
DXY	99.32	99.18	0.13

## 10-YEARS G-SEC YIELD

Country	Current	Previous	% Change
INDIA	6.357	6.342	0.24
USA	4.225	4.174	1.27

## KEY COMMODITIES TRACKER (in \$)

Commodity	Current	Change Points	% Change
Gold	3288.77	-30.52	-0.93
Silver	32.28	-0.64	-1.96
Crude-Oil	59.87	-0.55	-0.91
Brent-Crude	53.57	-0.68	-1.06

# CURRENCY FUTURES & INDEX TRENDS TRACKER



## CURRENCY FUTURES

Expiry	Close	Change Points	% Change
28 MAY-25 USD-INR	84.70	-0.71	-0.83
28 MAY-25 EUR-INR	96.40	-0.91	-0.93
28 MAY-25 GBP-INR	113.20	-1.11	-0.97
28 MAY-25 JPY- INR	59.29	-0.67	-1.12

## INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS

Index	Close	S2	S1	Pivot	R1	R2
NIFTY	24334	24112	24223	24310	24421	24507
SENSEX	80242	79569	79906	80216	80552	80862
NIFTY FUTURES	24418	24280	24349	24418	24487	24555
BANK NIFTY	55087	54342	54714	55096	55469	55851
CNX IT	35795	35048	35422	35814	36187	36580
CNX MIDCAP	54125	53358	53741	54271	54655	55185
CNX SMALLCAP	16449	16159	16304	16524	16670	16890
INDIA VIX	18.22	15.01	16.61	17.59	19.19	20.17

## 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

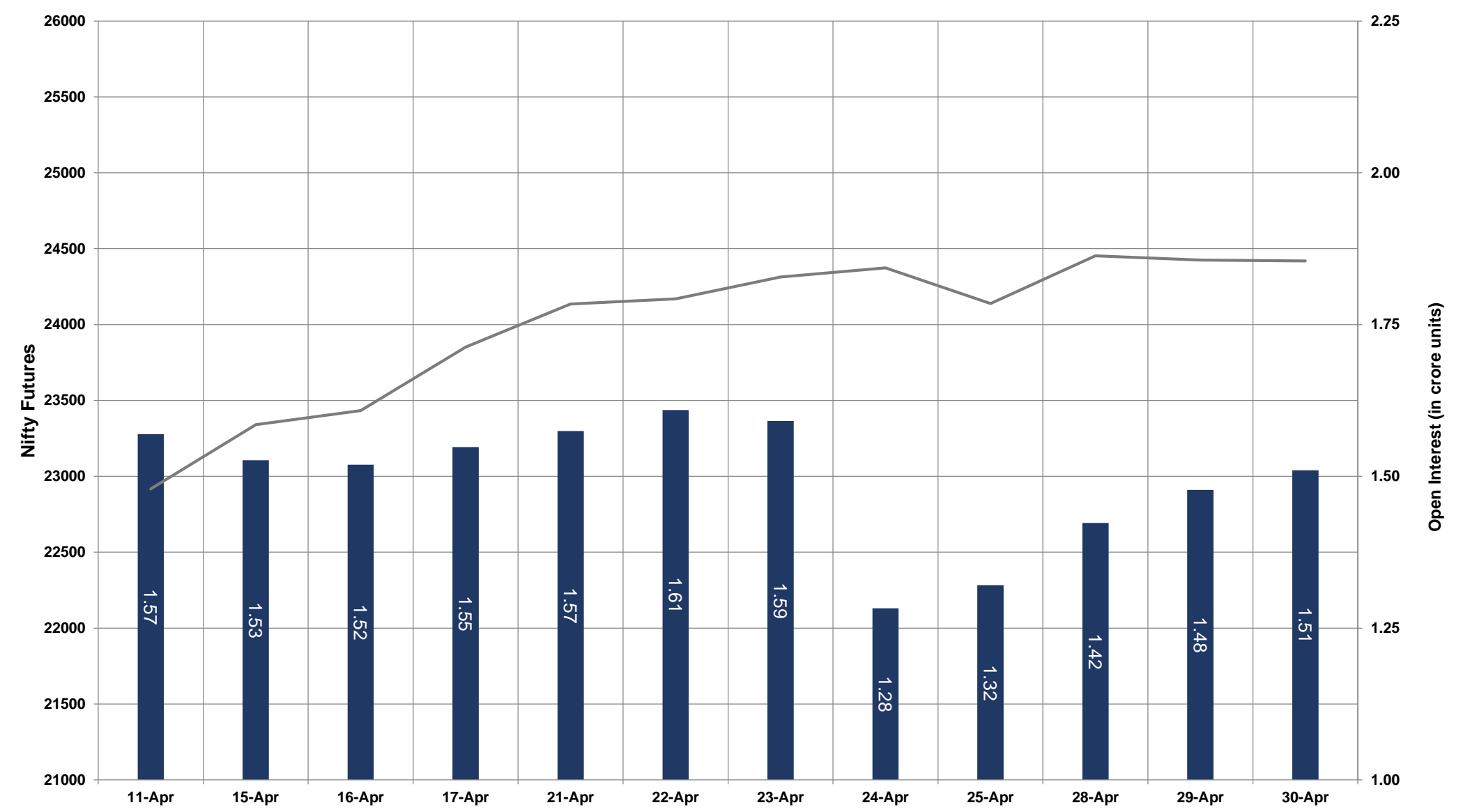


- Nifty Cash = **24334.20 (-0.01%)**
- Resistance levels = **24500** and **24650**
- Support levels = **24000** and **23850**

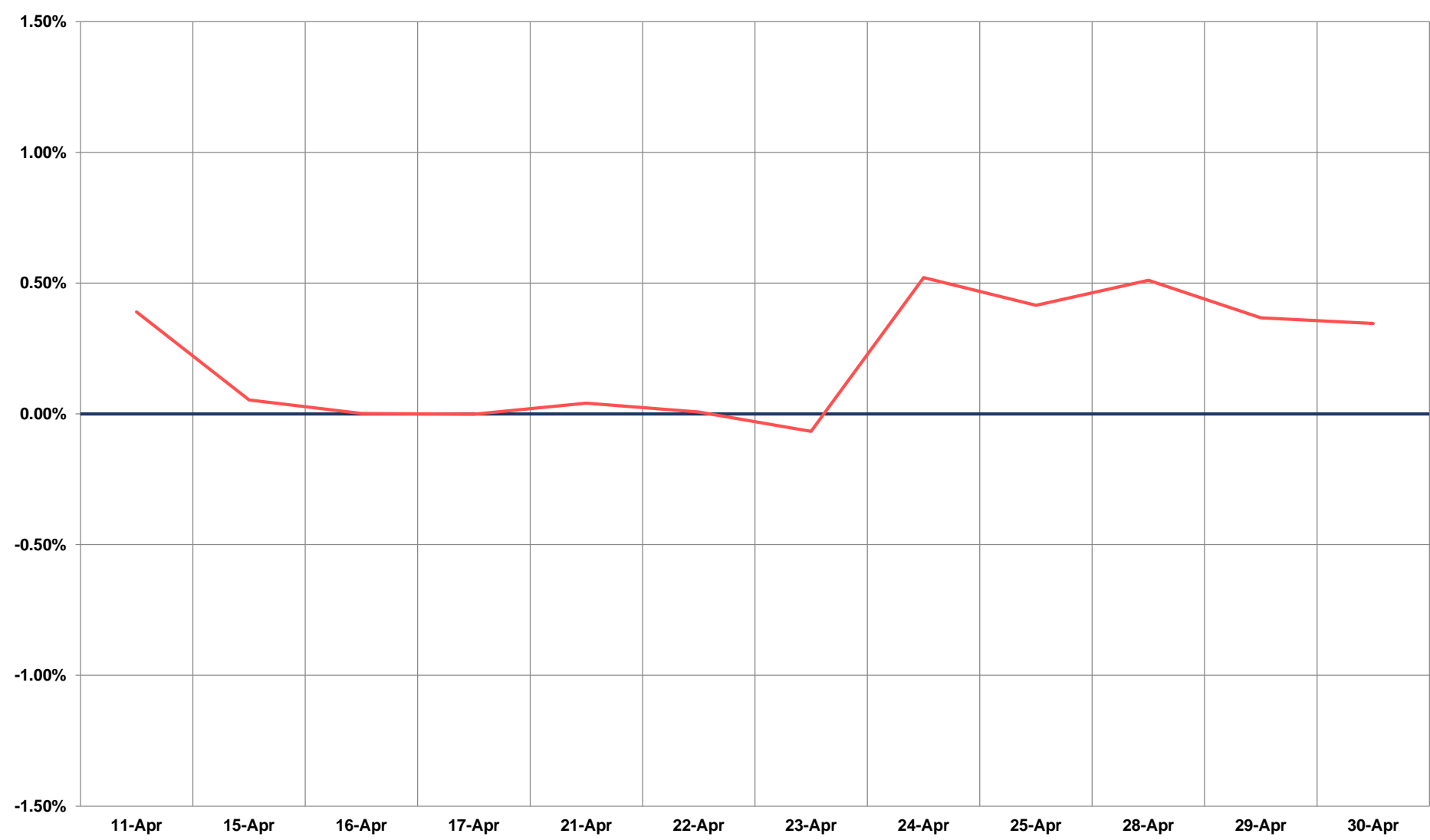
# TECHNICAL VIEWS



## NIFTY FUTURES



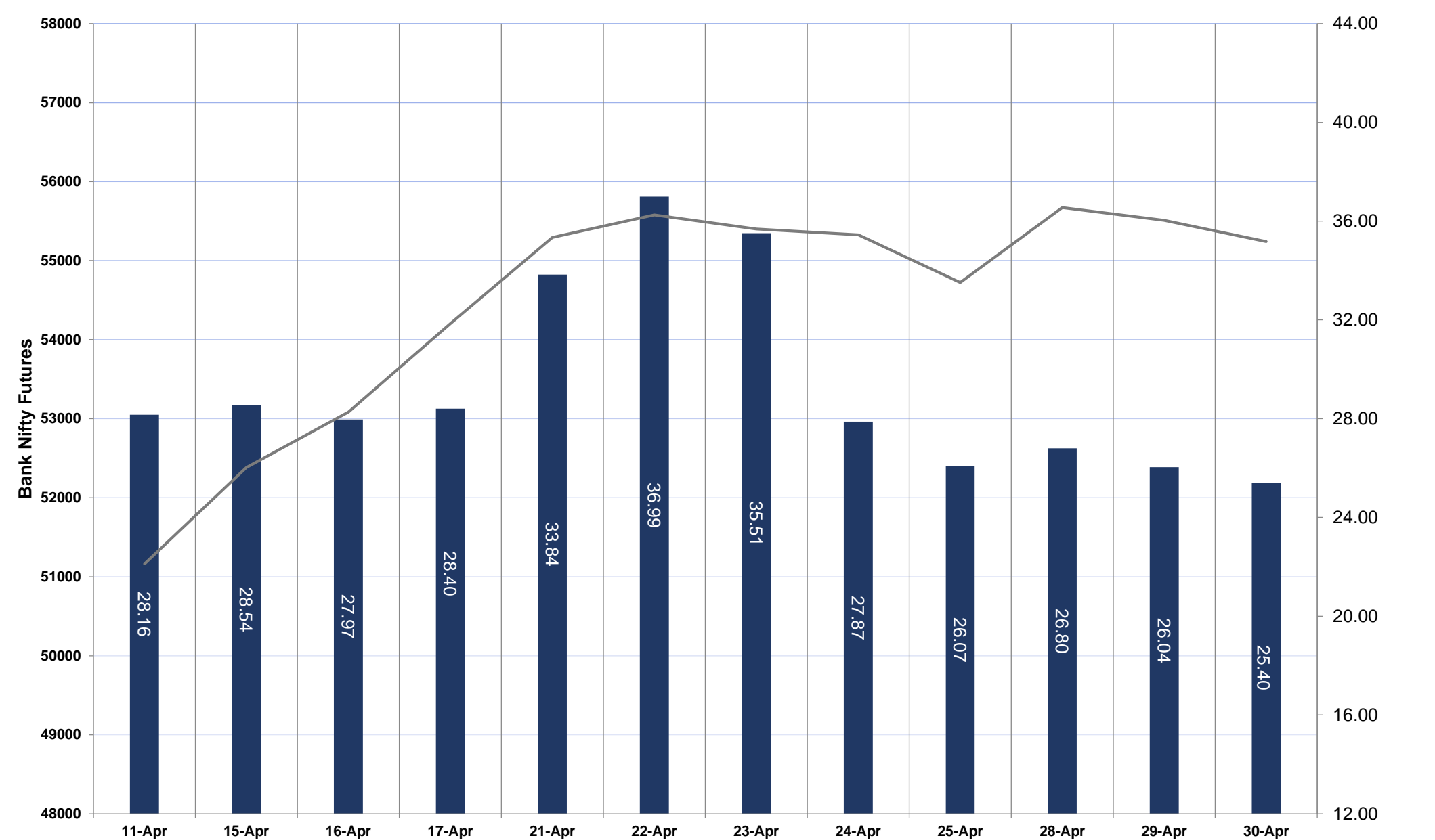
## SPREAD: FUTURE & SPOT



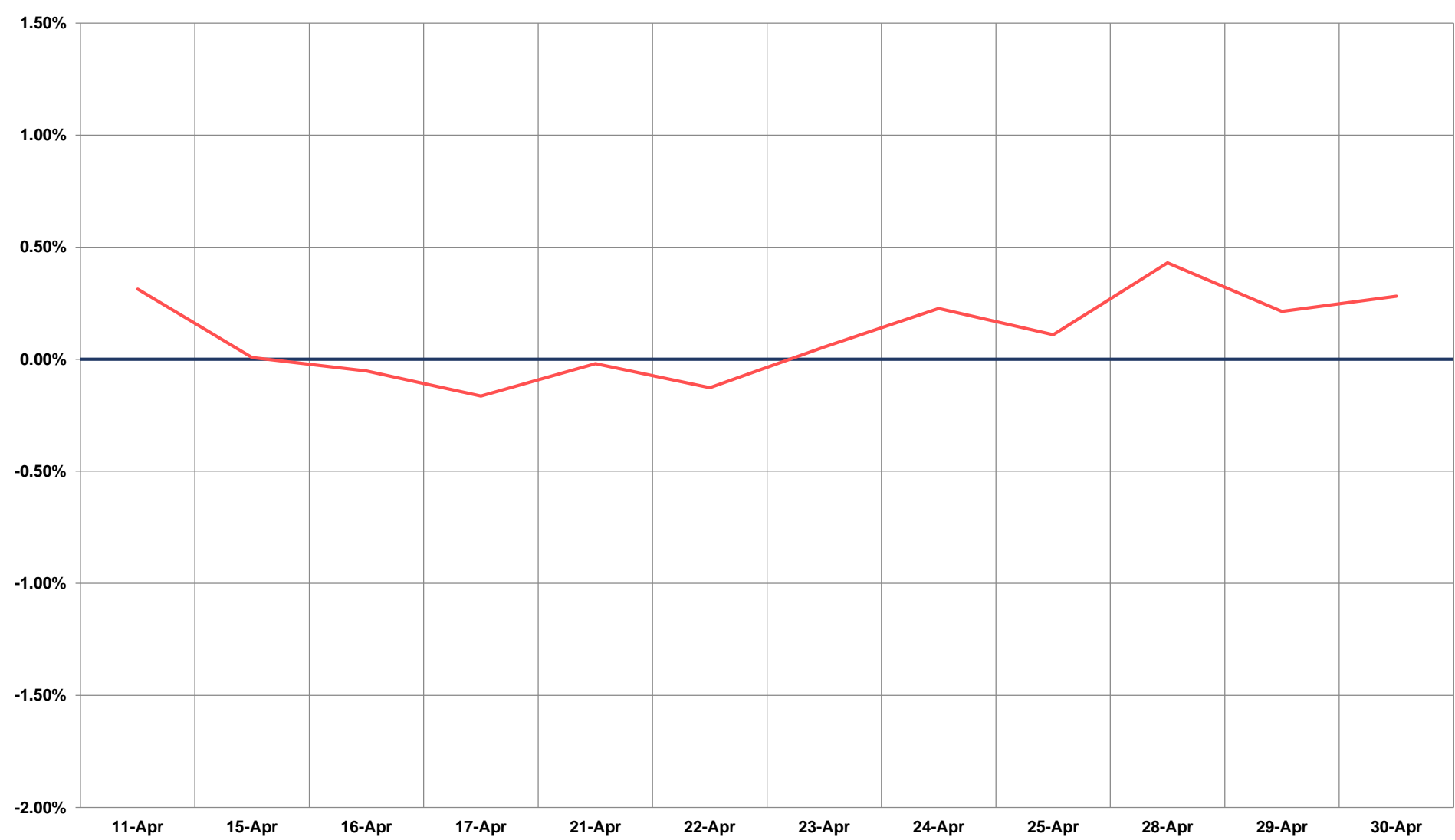
# TECHNICAL VIEWS



## BANK NIFTY FUTURES



## SPREAD: FUTURE & SPOT

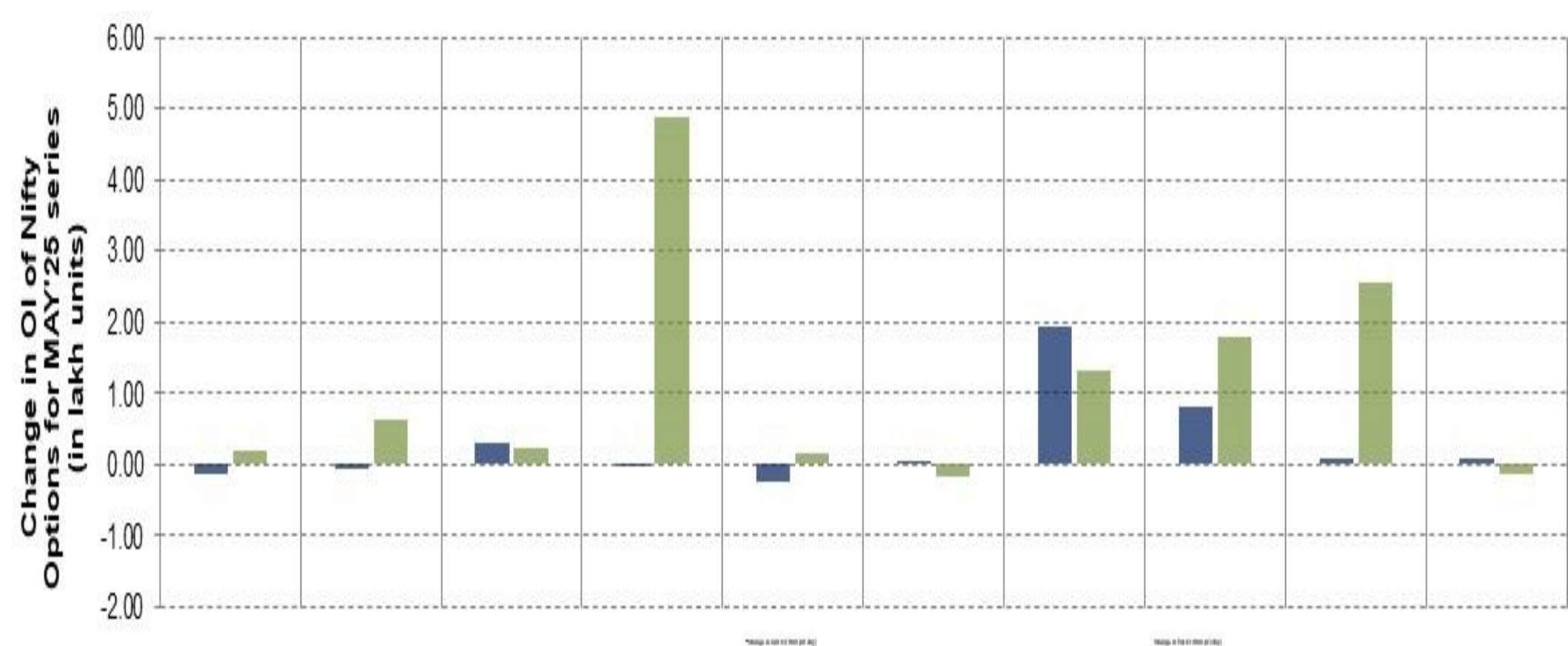
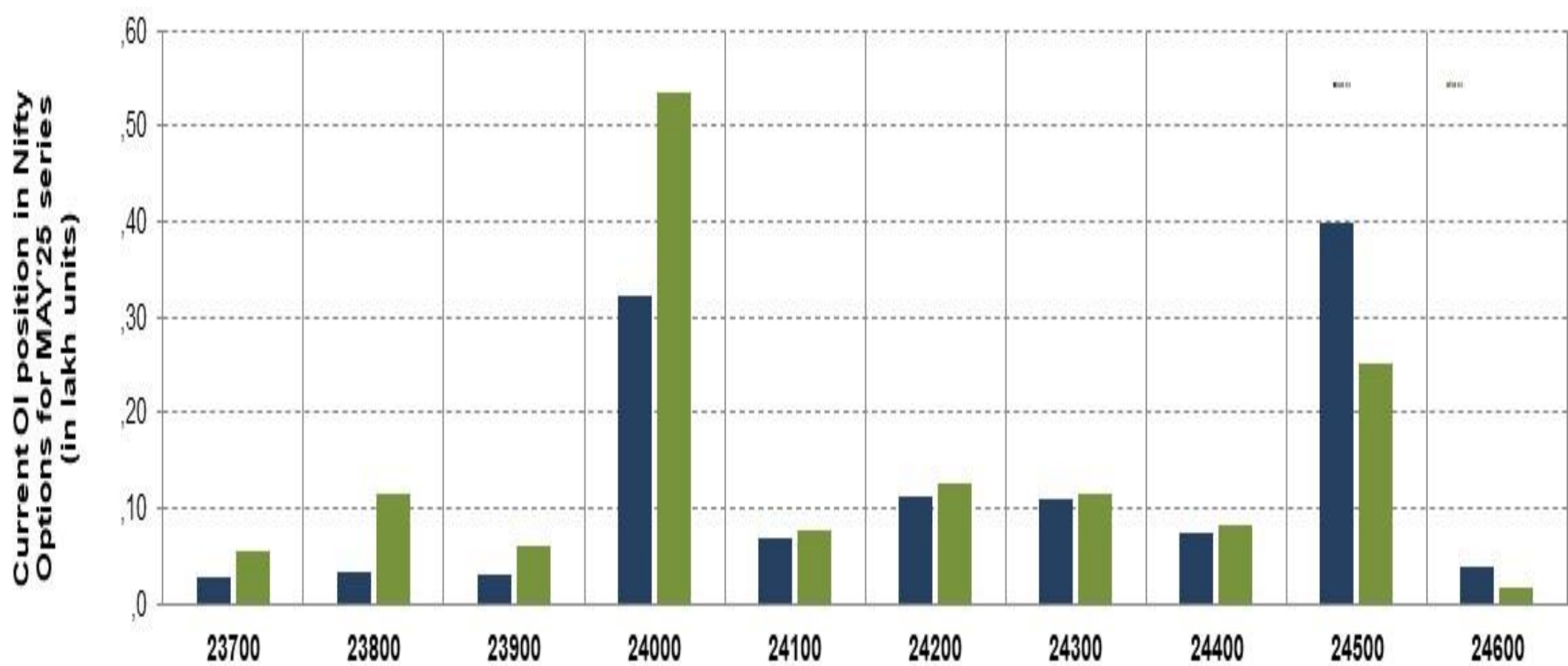




# TECHNICAL VIEWS



## NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.19 million in Open Interests is **Strike Price of 24300**
- **Most Active Nifty Put** with an addition of 0.49 millions in Open Interests is **Strike Price of 24000**
- **Maximum Open Interest an outstanding** was 3.98 millions for Calls at **Strike Price of 24500**
- **Maximum Open Interest an outstanding** was 5.35 millions for puts at **Strike Price of 24000**

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