



MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

MAY 06, 2025



Indian equity markets ended marginally lower on Tuesday, ahead of the U.S. Federal Reserve's policy decision. After a cautious start, soon markets slipped into the red and remained subdued for the rest of the session, weighed down by escalating geopolitical tensions between India and Pakistan, along with persistent concerns over US - China trade negotiations. Meanwhile, traders overlooked the report that India's Services Purchasing Managers' Index (PMI) for April 2025, compiled by S&P Global, rose to 58.7, an increase from 58.5 recorded in March.

Some of the important factors in trade:

Moody's ratings cut India's GDP growth projections: Sentiments were downbeat as Moody's Ratings cut India's GDP growth projections for 2025 to 6.3 per cent, from 6.5 per cent, saying economies globally will see a slowdown on account of heightened US policy uncertainty and trade restrictions.

RBI may cut rates by up to 125 bps in FY26: The SBI Research report said that the Reserve Bank of India may look at cutting policy rates by up to 125 basis points in current fiscal (FY26) amid consumer price index (CPI) inflation falling to a multi-year low of 3.34 per cent and expectation of benign inflation going forward.

Continued FIIs inflow: Traders overlooked the Foreign Institutional Investors (FIIs) bought equities worth Rs 497.79 crore on Monday, according to exchange data.

Global front: European markets were trading in red, as investors are focusing on corporate earnings updates, and looking ahead to the Federal Reserve's monetary policy announcement due on Wednesday. Asian markets ended mostly in green, as investors watched the latest developments in trade negotiations and awaited further policy action from Beijing to boost consumption.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	80641.07	-155.77	-0.19
NIFTY	24379.60	-81.55	-0.33
MIDCAP	42391.76	-935.04	-2.16
SMLCAP	46834.91	-1114.87	-2.33
BSEFMC	20604.81	-54.58	-0.26
HEALTHCARE	42012.00	-367.81	-0.87
AUTO	50901.69	35.32	0.07
POWER	6500.83	-176.45	-2.64
REALTY	6630.06	-239.54	-3.49
BSE IT	35155.76	-180.78	-0.51
BANKEX	61562.09	-585.75	-0.94
OIL GAS	26626.24	-569.19	-2.09
METAL	28749.97	-183.57	-0.63
INDIA VIX	19.00	0.66	3.60

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	634	2306	31
BSE	742	3209	121

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	5831	6132	(5)
NSE CASH	90454	89885	1
NSE F&O	144238	151322	(5)

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	21.95	3.61	1.29
SENSEX	22.47	4.15	1.15

KEY NUMBERS TRACKER



FII – DII ACTIVITY IN CASH SEGMENT (₹ in Crs)			
FII-DII*	Buy	Sell	Net
DII	10963	12361	(1398)
FII	13471	9677	3795

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)			
FII	Buy	Sell	Net
Index Futures	3482.65	2930.51	552
Index Options	958141.47	934746.88	23395
Stock Futures	21636.48	20876.43	760
Stock Options	58975.76	60493.21	(1517)

PUT-CALL RATIO		
Index	Current	Previous
NIFTY	0.92	0.97
BANK NIFTY	0.87	0.93

DOLLAR INDEX			
Dollar Index	Current	Previous	% Change
DXY	99.45	99.77	-0.32

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	3394.14	60.14	1.80
Silver	33.11	0.60	1.85
Crude-Oil	59.36	2.23	3.90
Brent-Crude	62.39	2.16	3.59

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES

Expiry	Close	Change Points	% Change
28 MAY-25 USD-INR	84.49	0.10	0.11
28 MAY-25 EUR-INR	95.85	-0.03	-0.03
28 MAY-25 GBP-INR	112.90	0.37	0.32
28 MAY-25 JPY- INR	59.19	0.14	0.23

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS

Index	Close	S2	S1	Pivot	R1	R2
NIFTY	24380	24229	24304	24407	24482	24585
SENSEX	80641	80201	80421	80701	80921	81202
NIFTY FUTURES	24431	24306	24369	24473	24535	24640
BANK NIFTY	54271	53630	53951	54494	54815	55358
CNX IT	35869	35452	35661	35987	36196	36523
CNX MIDCAP	53436	52339	52888	53891	54440	55443
CNX SMALLCAP	16195	15805	16000	16350	16545	16894
INDIA VIX	19.00	17.45	18.23	18.76	19.54	20.07

INDEX TREND ANALYSIS

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

SECURITIES BAN IN F&O TRADES FOR 07-05-2025

CDSL, MANAPPURAM, RBLBANK

TECHNICAL VIEWS



NIFTY

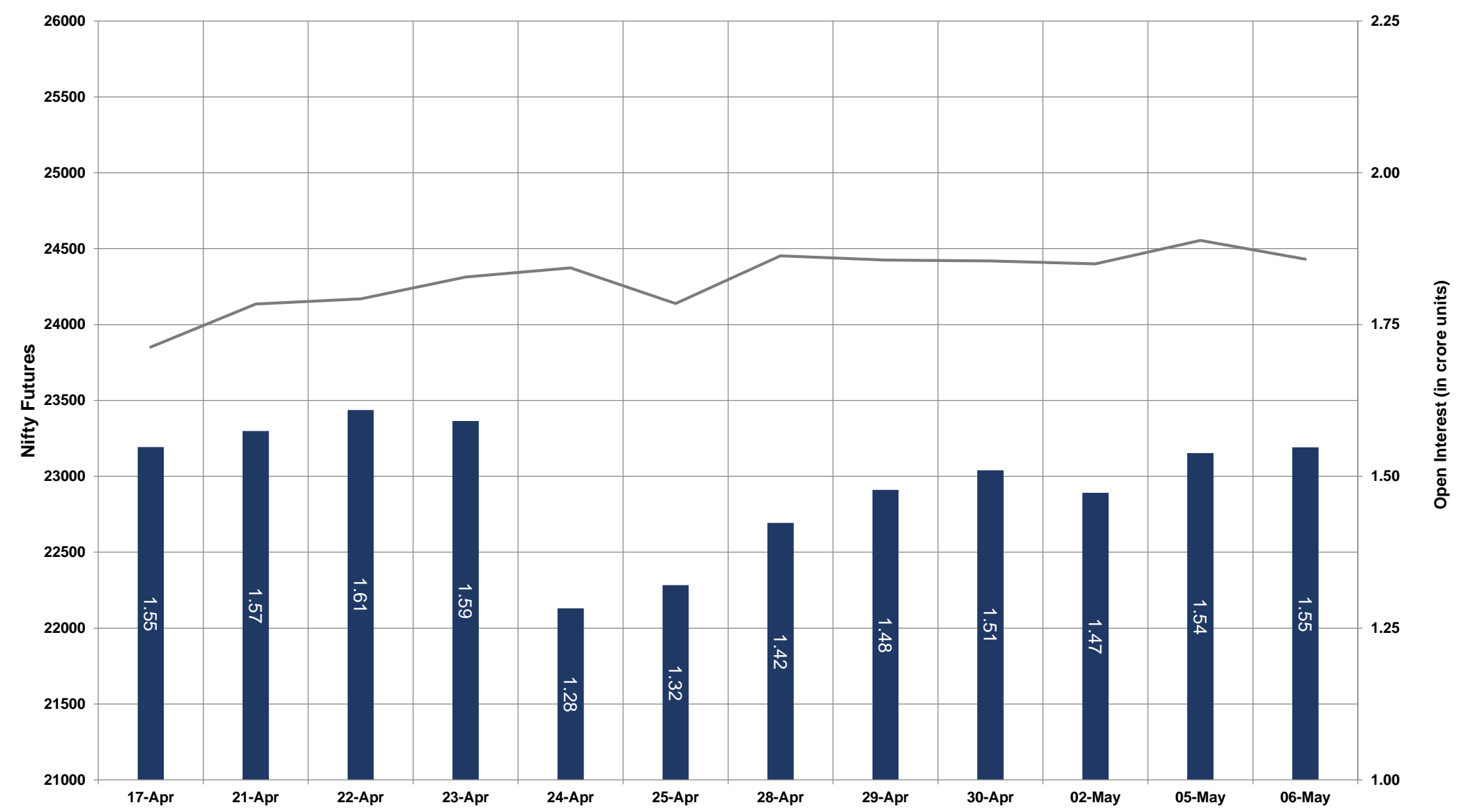


- Nifty Cash = **24379.60 (-0.33%)**
- Resistance levels = **24550** and **24650**
- Support levels = **24250** and **24100**

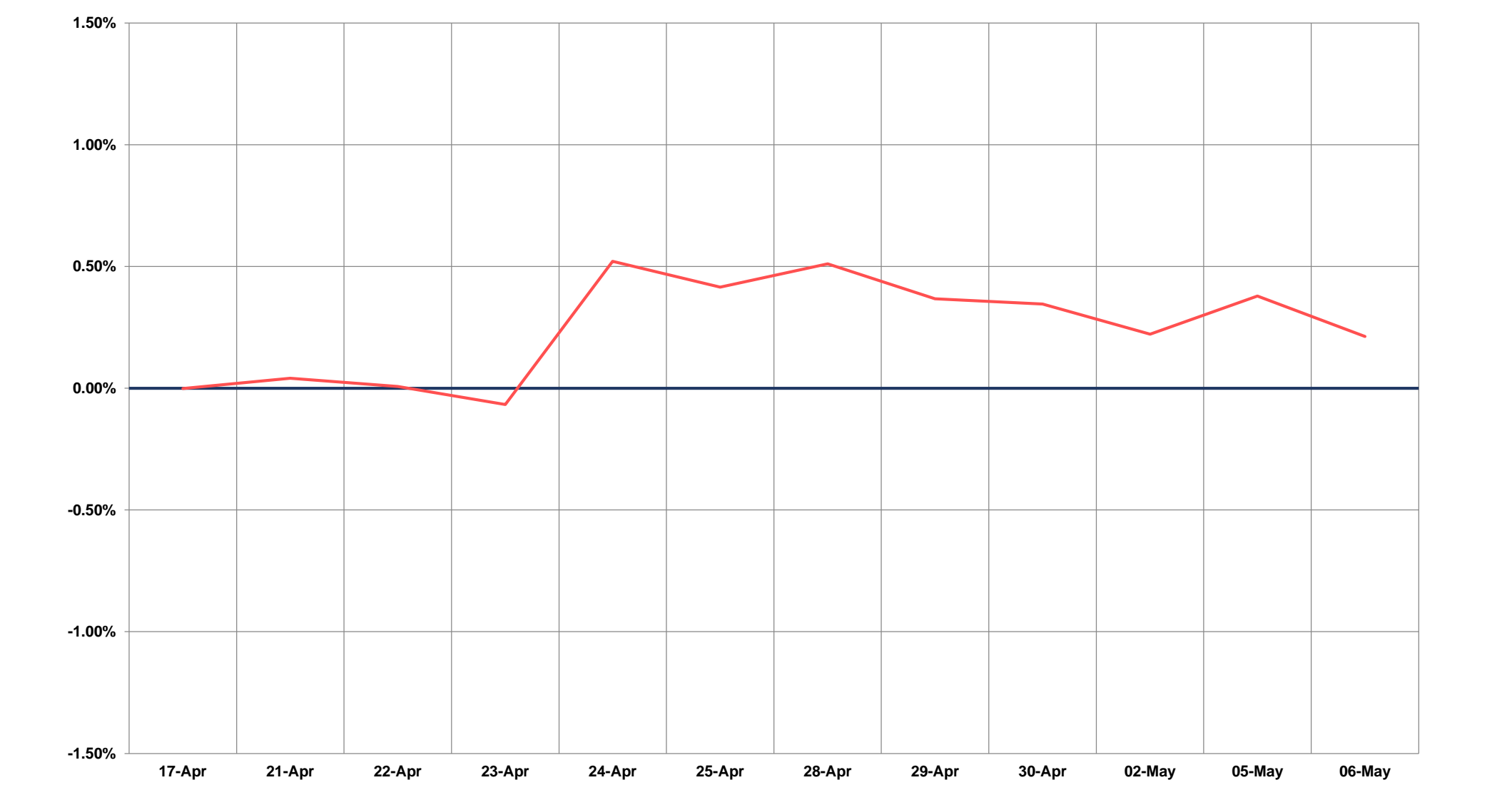
TECHNICAL VIEWS



NIFTY FUTURES



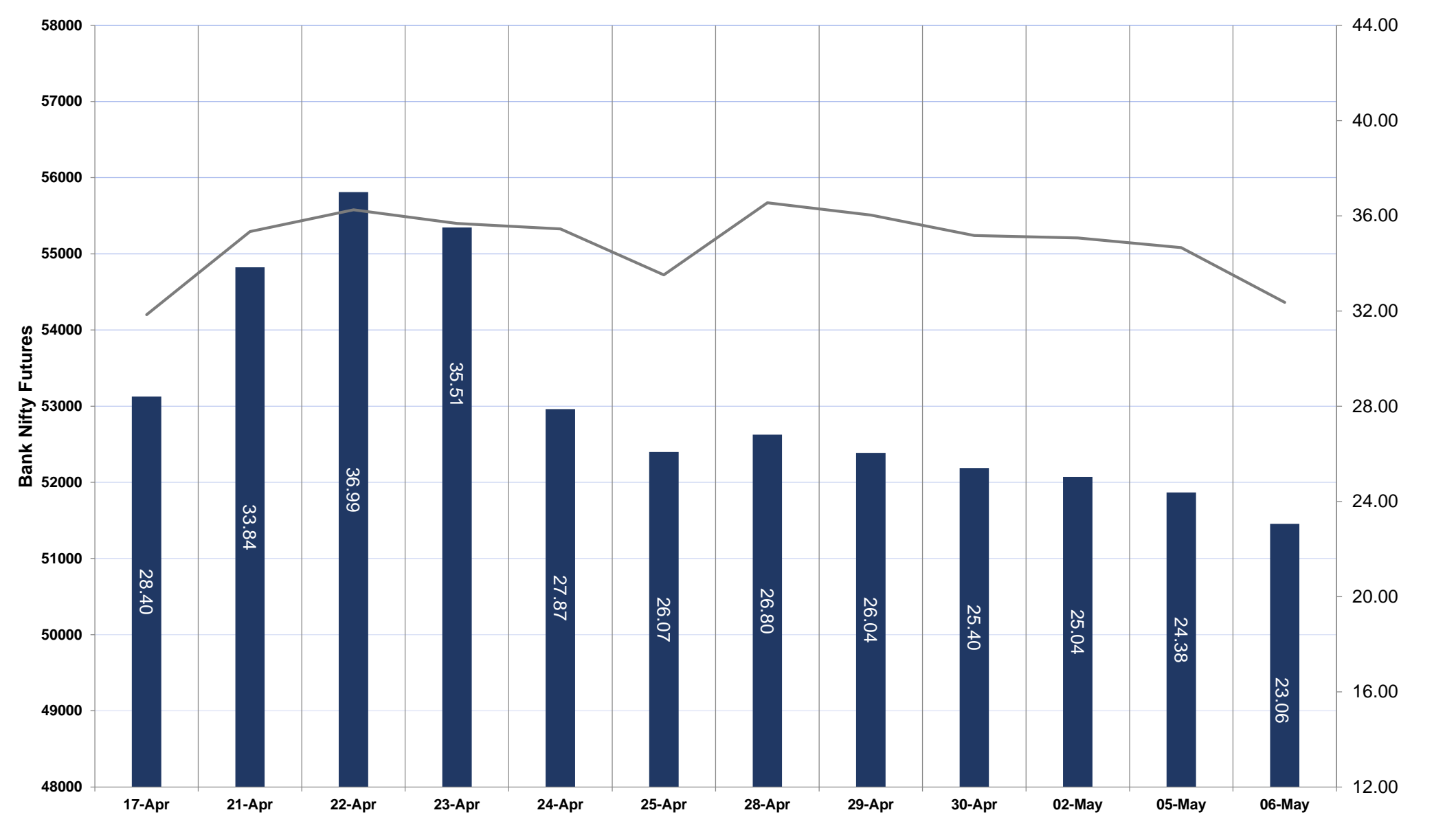
SPREAD: FUTURE & SPOT



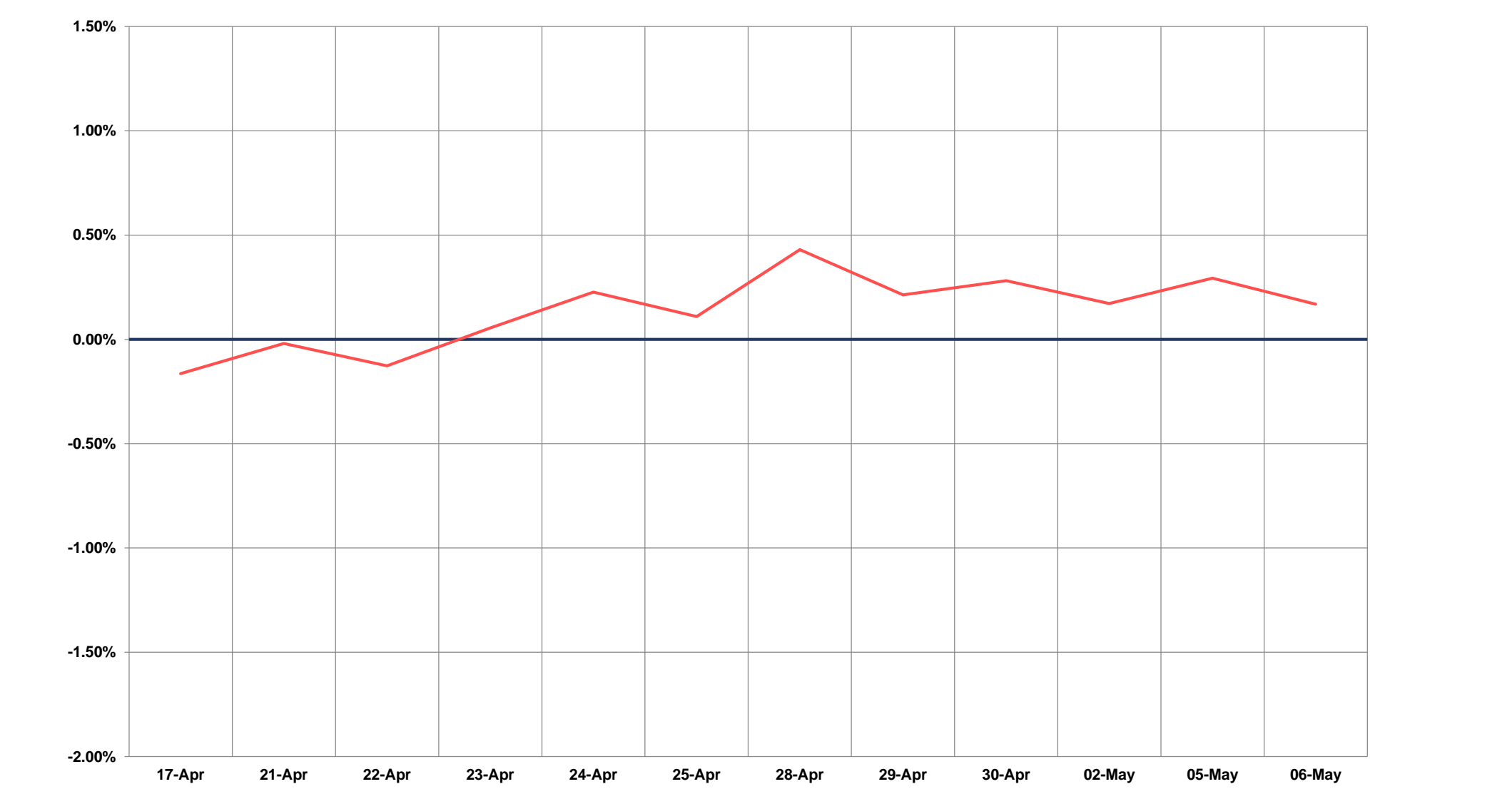
TECHNICAL VIEWS



BANK NIFTY FUTURES



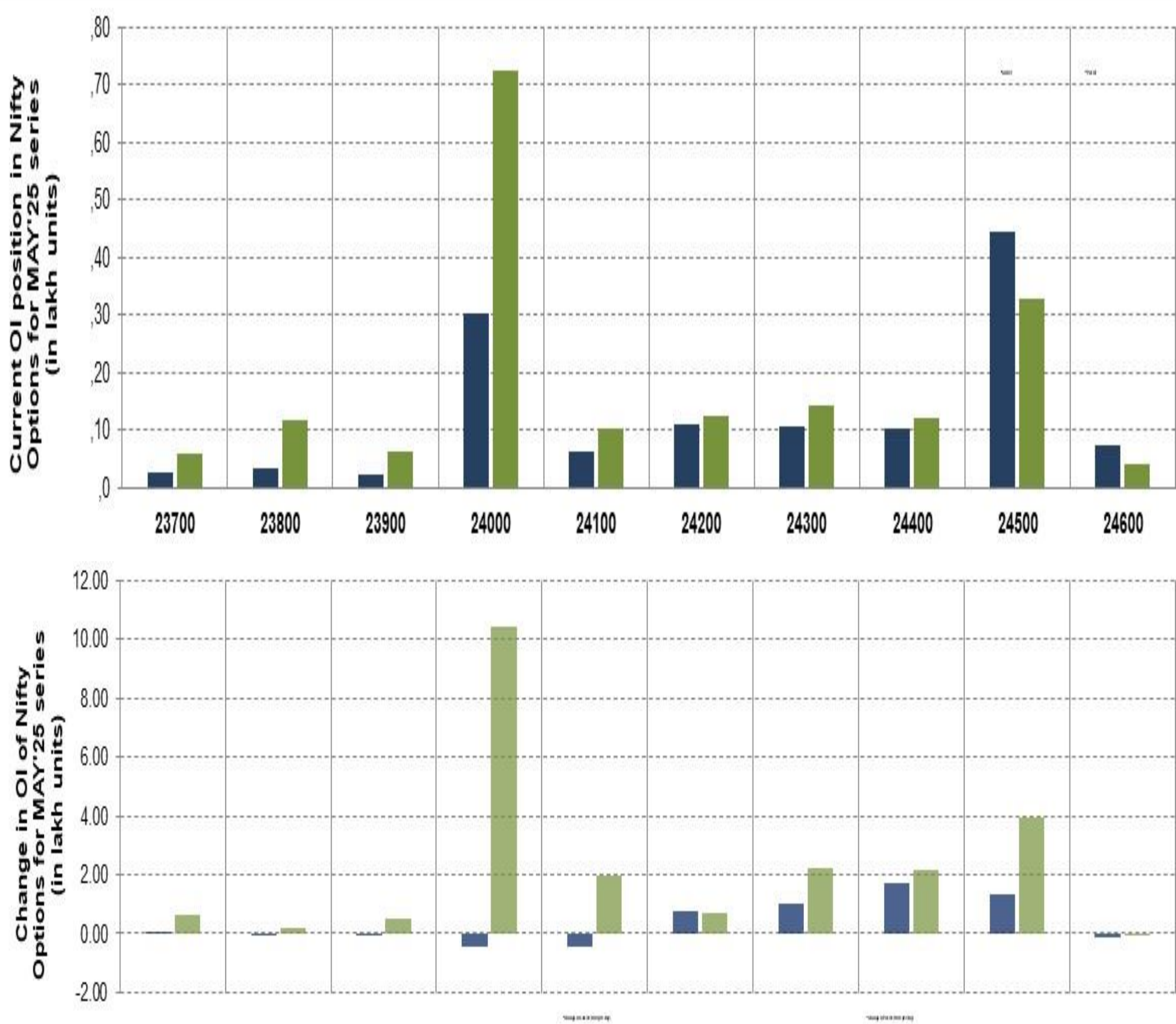
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.16 million in Open Interests is **Strike Price of 24400**
- **Most Active Nifty Put** with an addition of 1.03 millions in Open Interests is **Strike Price of 24000**
- **Maximum Open Interest an outstanding** was 4.44 millions for Calls at **Strike Price of 24500**
- **Maximum Open Interest an outstanding** was 7.24 millions for puts at **Strike Price of 24000**

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