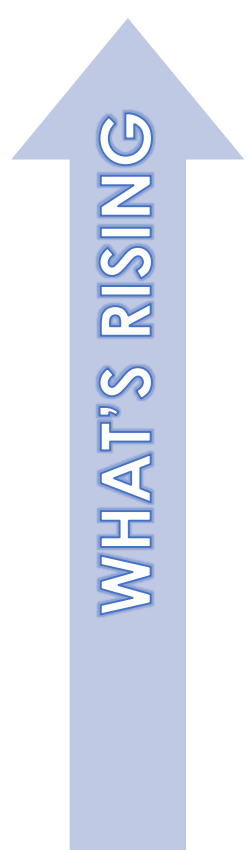


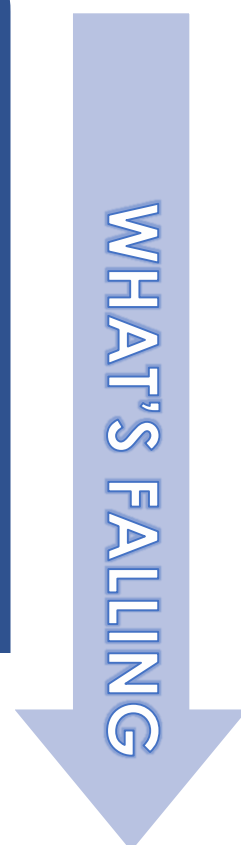


MORNING MANTRA



BULLS

BEARS



Daily Derivatives & Market Report

MAY 07, 2025



Indian equity markets ended slightly higher on Wednesday, overcoming early volatility amid weakness in global markets. After a cautious start, markets altered between red and green amid growing tensions between India and Pakistan after India's Armed Forces conducted Operation Sindoor, targeting terrorist infrastructure in Pakistan. In final hour of trade, markets managed to close with modest gains as investors were looking forward to US Federal Reserve's policy outcome, which is due later in the day.

Some of the important factors in trade:

India and the UK clinches a landmark trade deal: Sentiments got boost as India and the UK clinched a 'landmark' trade deal that will remove taxes on the export of labour-intensive products such as leather, footwear and clothing, while making imports of whisky and cars from Britain cheaper, in a bid to double trade between the two economies to \$120 billion by 2030.

Bilateral trade talks between India and US moving progressively: Piyush Goyal, the Union Commerce and Industry Minister, said that the Bilateral Trade Agreement (BTA) with the United States is moving progressively in the right direction.

Strong FII inflows: Some support came with provisional data from the National Stock Exchange showing that foreign portfolio investors stayed net buyers of Indian equities for the 14th straight session on Tuesday, as they bought stocks worth Rs 3,794.52 crore.

Global front: European markets were trading in red, as investors react to the latest batch of economic data and earnings updates, and await the U.S. Federal Reserve's monetary policy announcement later in the day. Asian markets ended mostly in green, as US and Chinese officials are set to start formal trade talks this week.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	80746.78	105.71	0.13
NIFTY	24414.40	34.80	0.14
MIDCAP	42970.15	578.39	1.36
SMLCAP	47377.90	542.99	1.16
BSEFMC	20519.95	-84.86	-0.41
HEALTHCARE	41979.85	-32.15	-0.08
AUTO	51787.51	885.82	1.74
POWER	6562.38	61.55	0.95
REALTY	6704.14	74.08	1.12
BSE IT	35223.80	68.04	0.19
BANKEX	61892.91	330.82	0.54
OIL GAS	26744.90	118.66	0.45
METAL	29093.52	343.55	1.19
INDIA VIX	19.06	0.06	0.32

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1943	944	46
BSE	2208	1683	155

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	5315	5831	(9)
NSE CASH	101215	90454	12
NSE F&O	174784	144238	21

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	21.99	3.61	1.27
SENSEX	22.50	4.16	1.15

KEY NUMBERS TRACKER



FII – DII ACTIVITY IN CASH SEGMENT (₹ in Crs)			
FII-DII*	Buy	Sell	Net
DII	13169	10791	2378
FII	16372	13786	2586

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)			
FII	Buy	Sell	Net
Index Futures	3831.44	3362.26	469
Index Options	1463493.25	1467961.69	(4468)
Stock Futures	20899.17	18763.16	2136
Stock Options	61288.34	58927.39	2361

PUT-CALL RATIO		
Index	Current	Previous
NIFTY	0.96	0.92
BANK NIFTY	0.86	0.87

DOLLAR INDEX			
Dollar Index	Current	Previous	% Change
DXY	99.44	99.39	0.05

10-YEARS G-SEC YIELD			
Country	Current	Previous	% Change
INDIA	6.337	6.350	-0.20
USA	4.290	4.318	-0.65

KEY COMMODITIES TRACKER (in \$)			
Commodity	Current	Change Points	% Change
Gold	3384.31	-16.00	-0.47
Silver	32.82	-0.32	-0.99
Crude-Oil	59.43	0.34	0.58
Brent-Crude	62.39	0.24	0.39

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES

Expiry	Close	Change Points	% Change
28 MAY-25 USD-INR	84.89	0.38	0.45
28 MAY-25 EUR-INR	96.54	0.68	0.71
28 MAY-25 GBP-INR	113.35	0.48	0.42
28 MAY-25 JPY- INR	59.46	0.27	0.46

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS

Index	Close	S2	S1	Pivot	R1	R2
NIFTY	24414	24132	24273	24361	24503	24591
SENSEX	80747	79602	80175	80510	81082	81417
NIFTY FUTURES	24461	24209	24335	24437	24563	24664
BANK NIFTY	54611	53641	54126	54405	54890	55169
CNX IT	35920	35199	35560	35801	36161	36403
CNX MIDCAP	54288	52206	53247	53788	54829	55370
CNX SMALLCAP	16418	15781	16099	16269	16588	16758
INDIA VIX	19.06	17.68	18.37	19.05	19.74	20.42

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	Buy	NEUTRAL	NEUTRAL
CNX SMALLCAP	NEUTRAL	NEUTRAL	NEUTRAL
INDIA VIX	Buy	NEUTRAL	SELL

SECURITIES BAN IN F&O TRADES FOR 08-05-2025

CDSL, MANAPPURAM, RBLBANK

TECHNICAL VIEWS



NIFTY

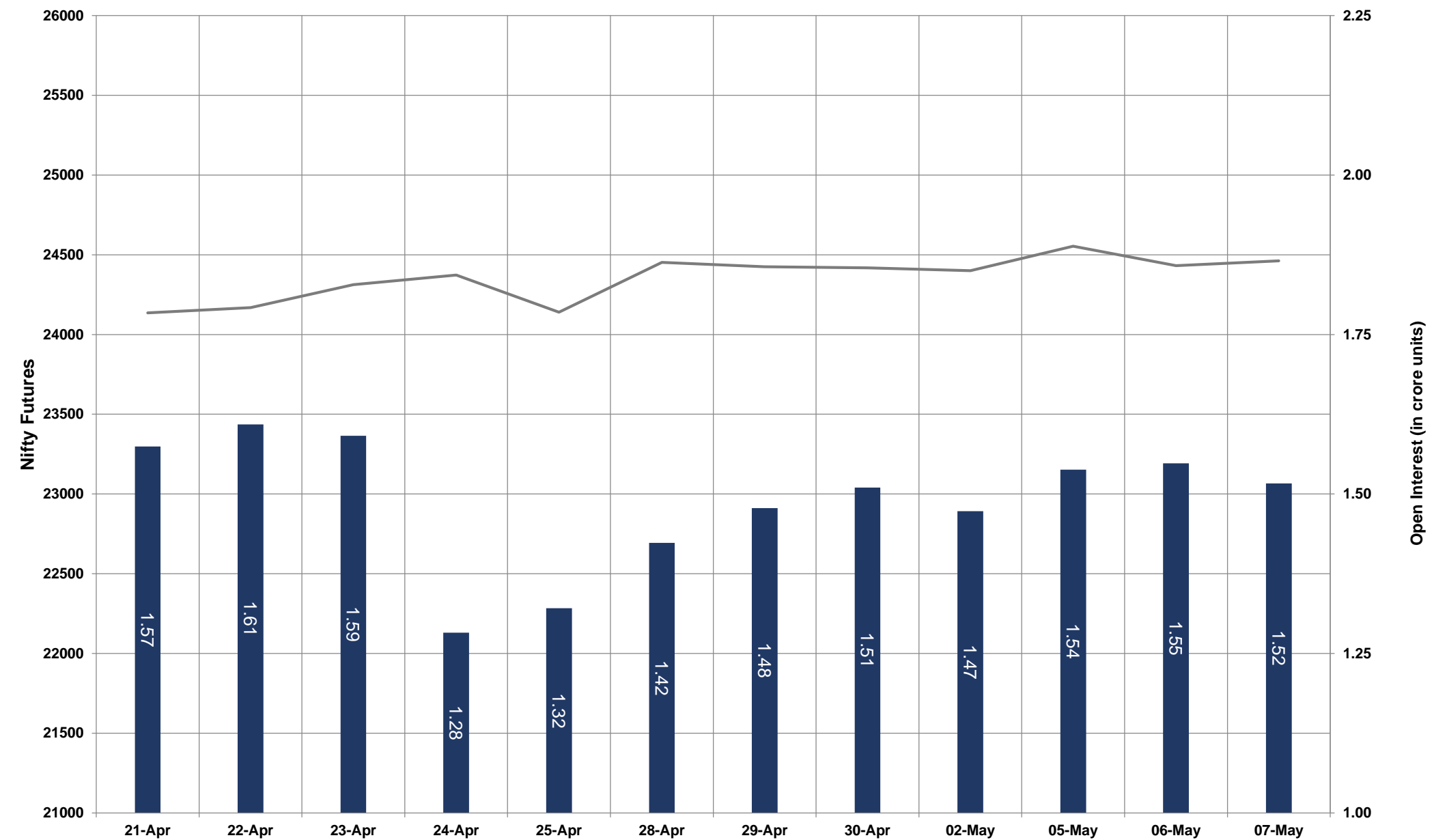


- Nifty Cash = **24414.40 (0.14%)**
- Resistance levels = **24550** and **24650**
- Support levels = **24250** and **24100**

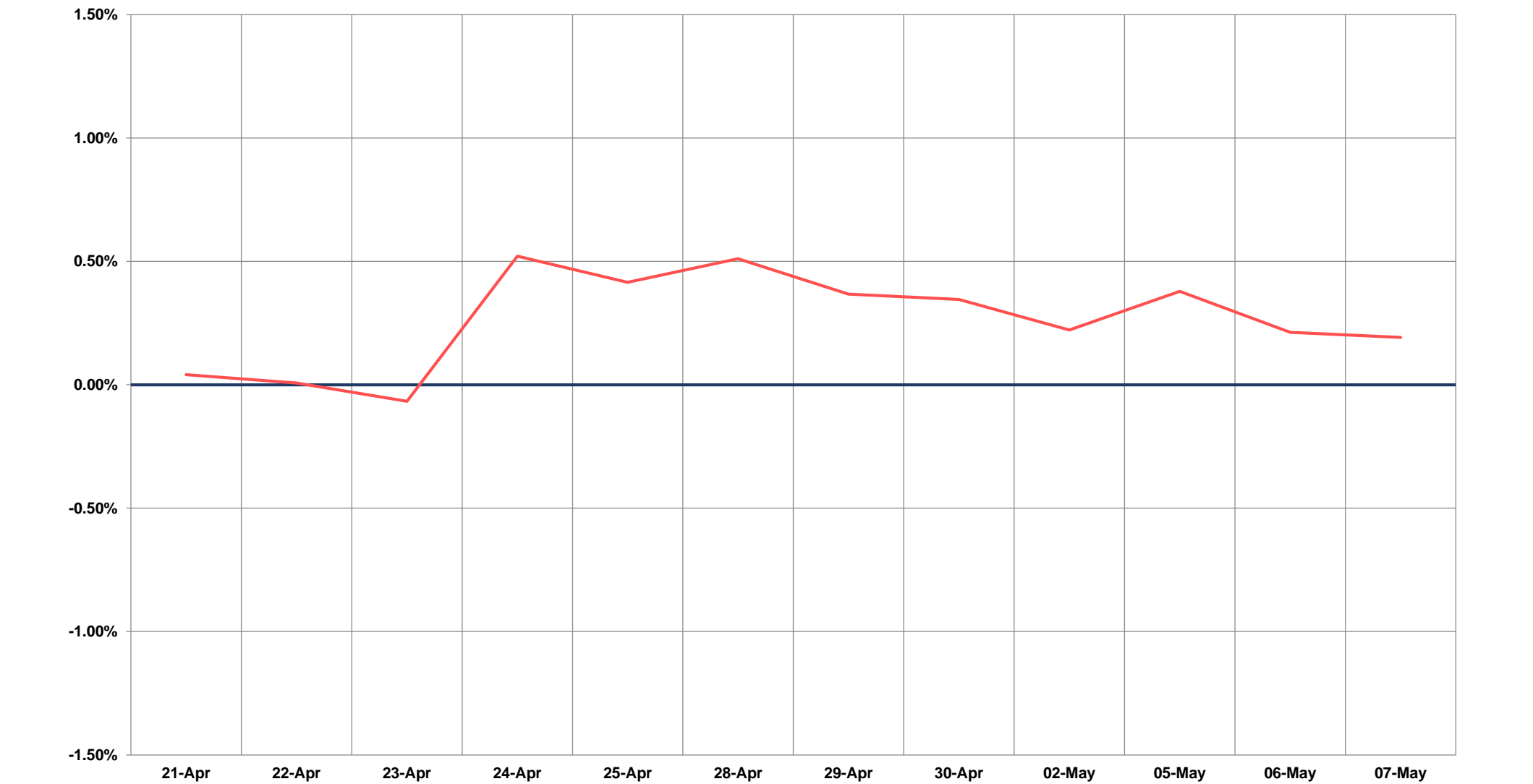
TECHNICAL VIEWS



NIFTY FUTURES



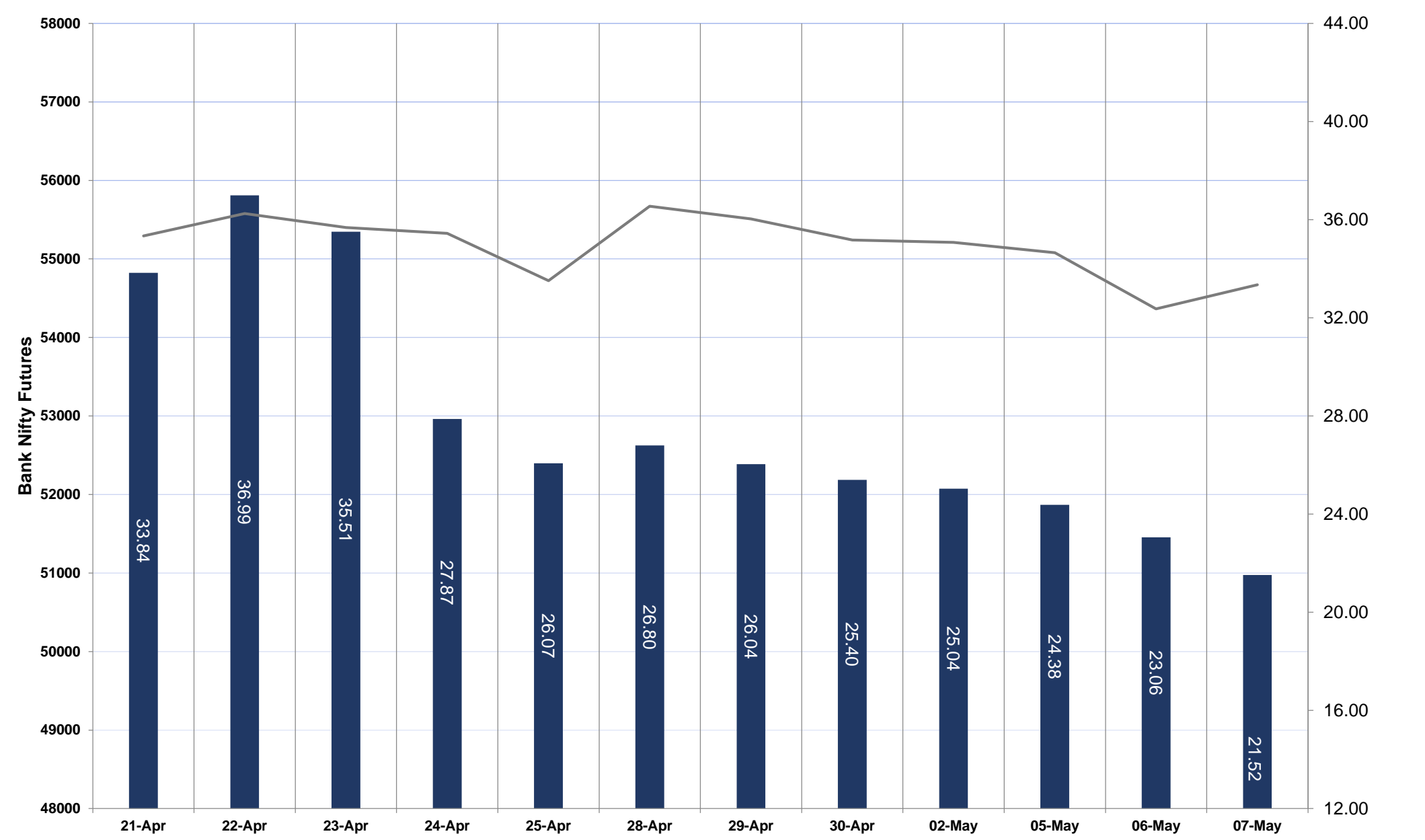
SPREAD: FUTURE & SPOT



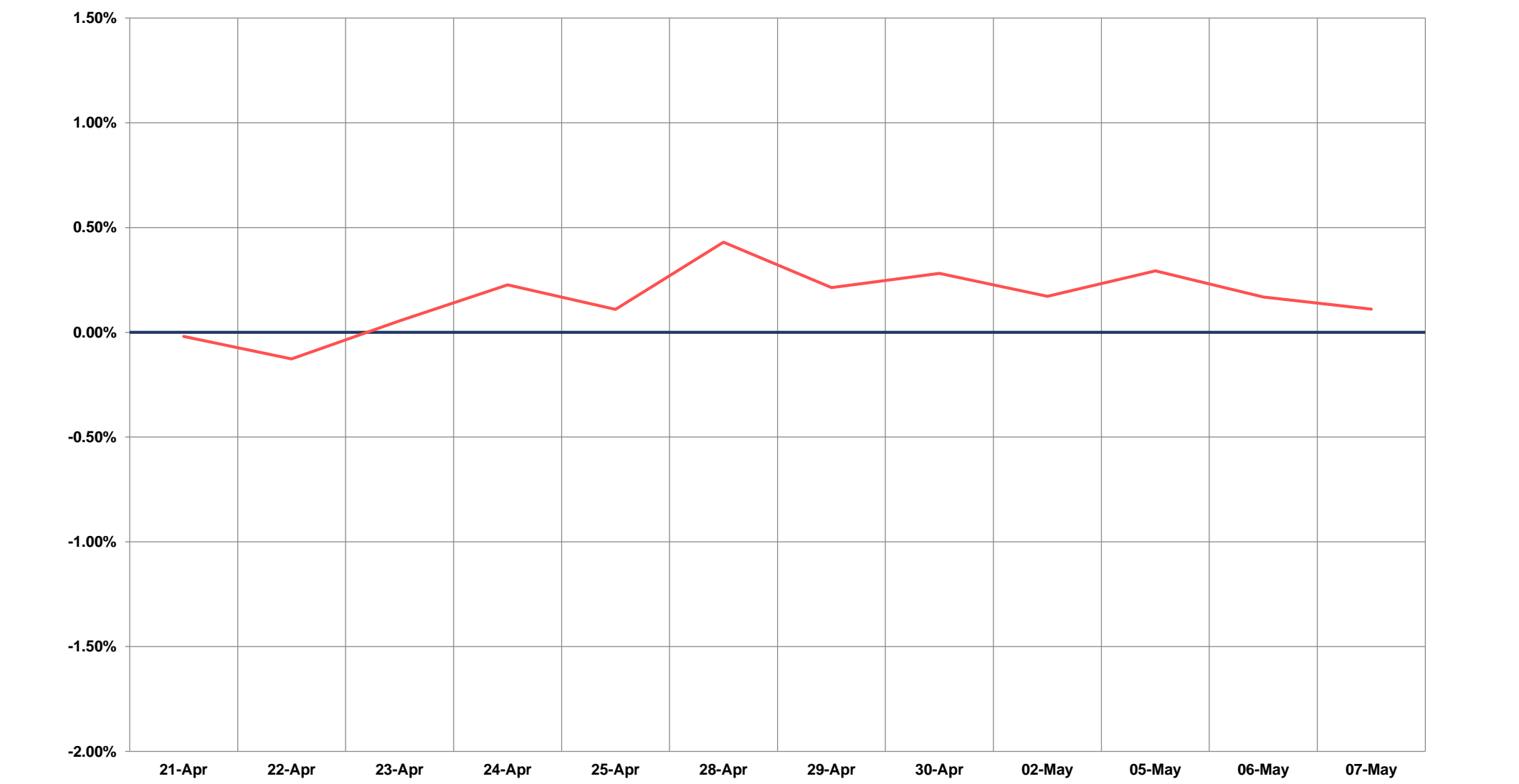
TECHNICAL VIEWS



BANK NIFTY FUTURES



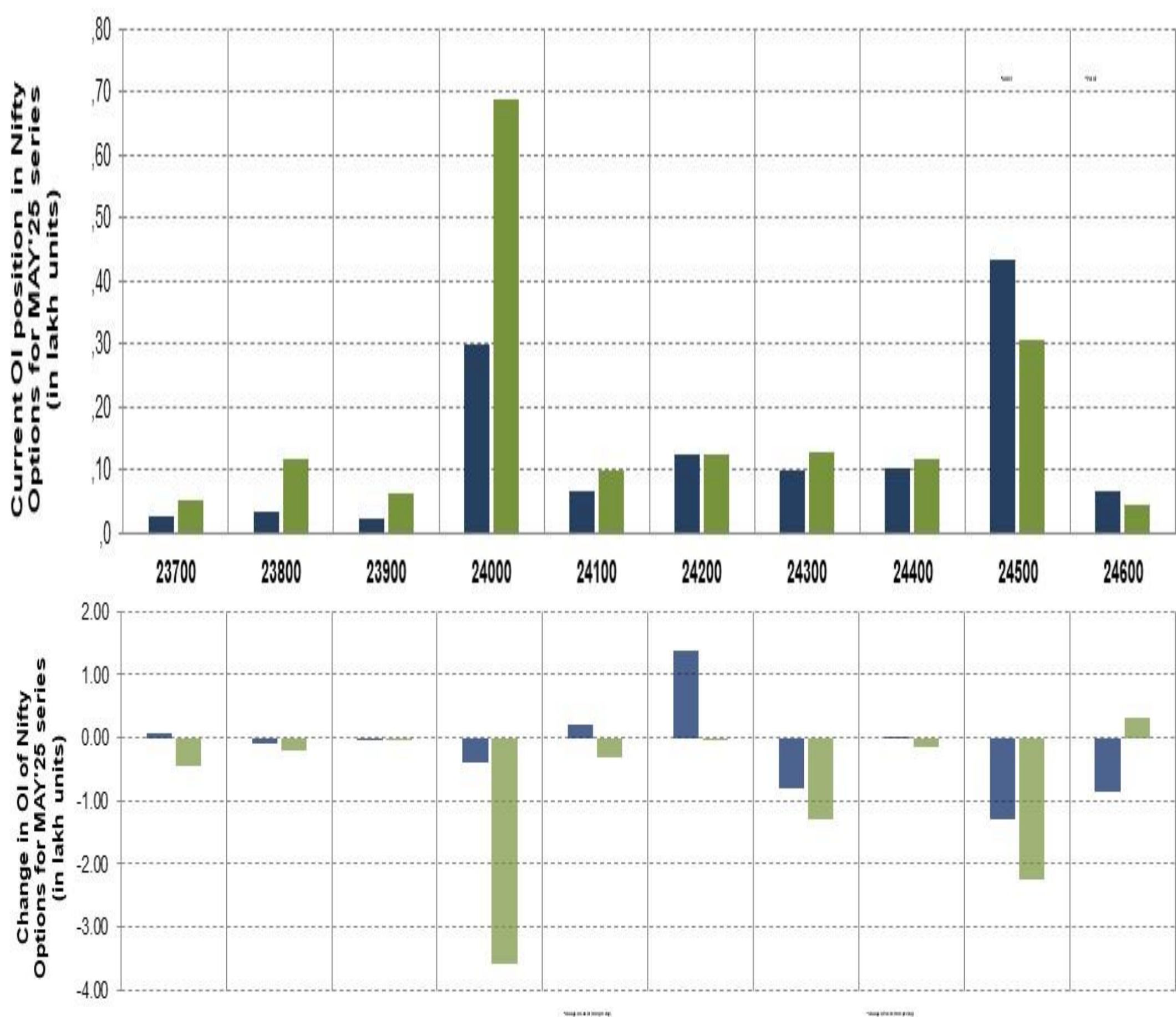
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.13 million in Open Interests is **Strike Price of 24200**
- **Most Active Nifty Put** with a reduction of 0.35 millions in Open Interests is **Strike Price of 24000**
- **Maximum Open Interest an outstanding** was 4.31 millions for Calls at **Strike Price of 24500**
- **Maximum Open Interest an outstanding** was 6.88 millions for puts at **Strike Price of 24000**

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