



MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

MAY 08, 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	80334.81	-411.97	-0.51
NIFTY	24273.80	-140.60	-0.58
MIDCAP	42154.47	-815.68	-1.90
SMLCAP	46882.73	-495.17	-1.05
BSEFMC	20312.78	-207.17	-1.01
HEALTHCARE	41287.94	-691.91	-1.65
AUTO	50791.95	-995.56	-1.92
POWER	6440.50	-121.88	-1.86
REALTY	6529.84	-174.30	-2.60
BSE IT	35266.98	43.18	0.12
BANKEX	61741.83	-151.08	-0.24
OIL GAS	26215.61	-529.29	-1.98
METAL	28573.15	-520.37	-1.79
INDIA VIX	21.01	1.95	10.23

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	945	1960	46
BSE	1345	2554	133

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	5363	5315	1
NSE CASH	105606	101215	4
NSE F&O	189435	174784	8

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	21.86	3.59	1.28
SENSEX	22.39	4.14	1.14

KEY NUMBERS TRACKER



FII – DII ACTIVITY IN CASH SEGMENT (₹ in Crs)

FII-DII*	Buy	Sell	Net
DII	12683	13279	(596)
FII	22366	20358	2008

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	6639.44	5300.80	1339
Index Options	2662281.87	2574740.00	87542
Stock Futures	27670.10	28568.40	(898)
Stock Options	61426.98	60669.92	757

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.01	0.96
BANK NIFTY	0.84	0.86

DOLLAR INDEX

Dollar Index	Current	Previous	% Change
DXY	100.17	99.86	0.30

10-YEARS G-SEC YIELD

Country	Current	Previous	% Change
INDIA	6.399	6.337	0.98
USA	4.308	4.275	0.77

KEY COMMODITIES TRACKER (in \$)

Commodity	Current	Change Points	% Change
Gold	3342.53	-33.20	-0.98
Silver	32.50	0.04	0.15
Crude-Oil	58.80	0.73	1.26
Brent-Crude	61.80	0.68	1.11

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES			
Expiry	Close	Change Points	% Change
28 MAY-25 USD-INR	85.64	0.75	0.88
28 MAY-25 EUR-INR	96.70	0.12	0.12
28 MAY-25 GBP-INR	114.05	0.69	0.61
28 MAY-25 JPY- INR	59.45	-0.01	-0.02

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS						
Index	Close	S2	S1	Pivot	R1	R2
NIFTY	24274	23993	24134	24290	24431	24587
SENSEX	80335	79476	79906	80417	80846	81357
NIFTY FUTURES	24272	24000	24136	24330	24466	24660
BANK NIFTY	54366	53641	54003	54470	54833	55300
CNX IT	36002	35618	35810	36025	36218	36433
CNX MIDCAP	53229	51895	52562	53604	54272	55314
CNX SMALLCAP	16184	15766	15975	16300	16509	16834
INDIA VIX	21.01	16.61	18.81	20.35	22.55	24.09

INDEX TREND ANALYSIS			
Index	Daily	Weekly	Monthly
NIFTY	NEUTRAL	NEUTRAL	Buy
SENSEX	NEUTRAL	NEUTRAL	Buy
NIFTY FUTURES	NEUTRAL	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 09-05-2025
CDSL, MANAPPURAM, RBLBANK

TECHNICAL VIEWS



NIFTY

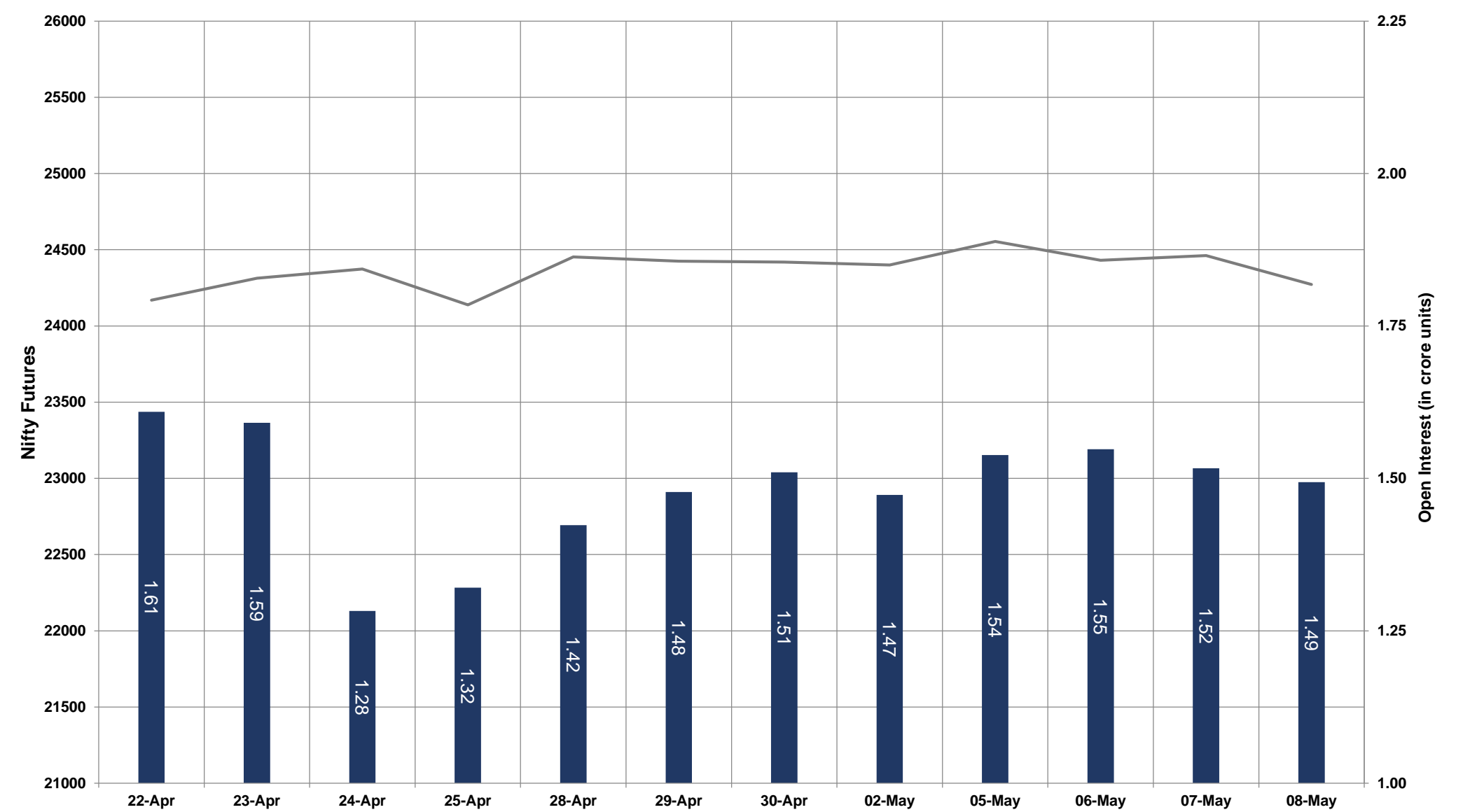


- Nifty Cash = **24273.80 (-0.58%)**
- Resistance levels = **24550** and **24650**
- Support levels = **24150** and **23950**

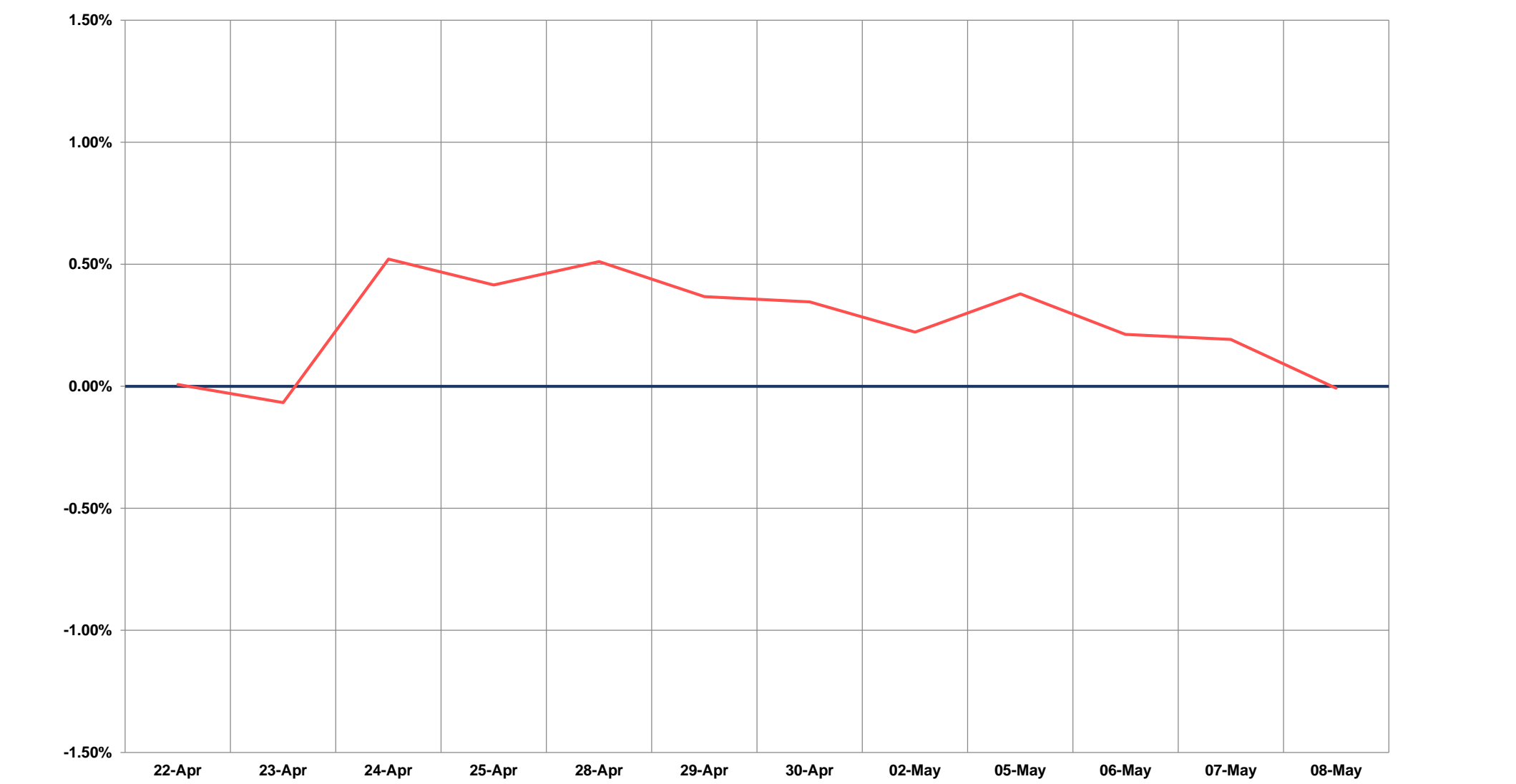
TECHNICAL VIEWS



NIFTY FUTURES



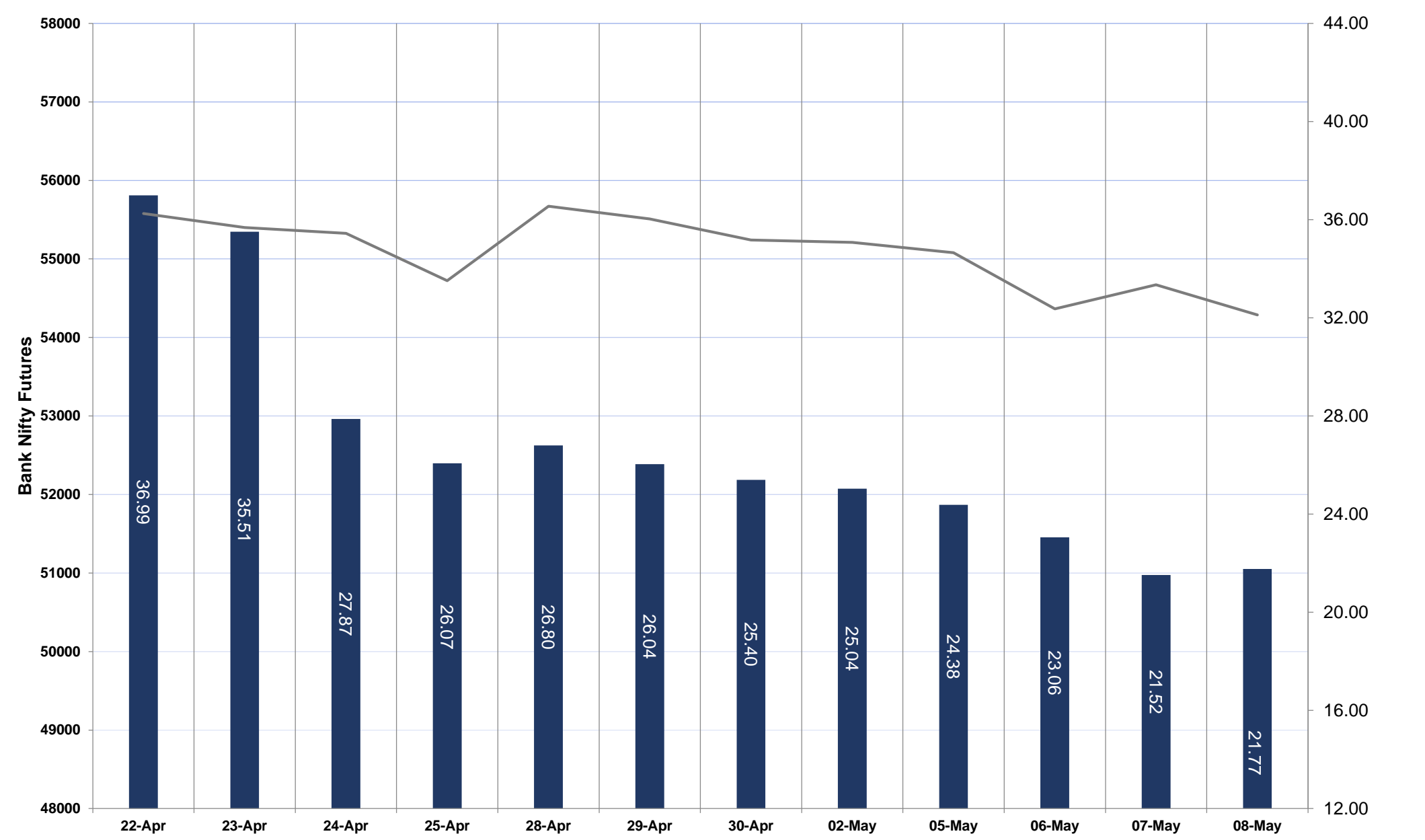
SPREAD: FUTURE & SPOT



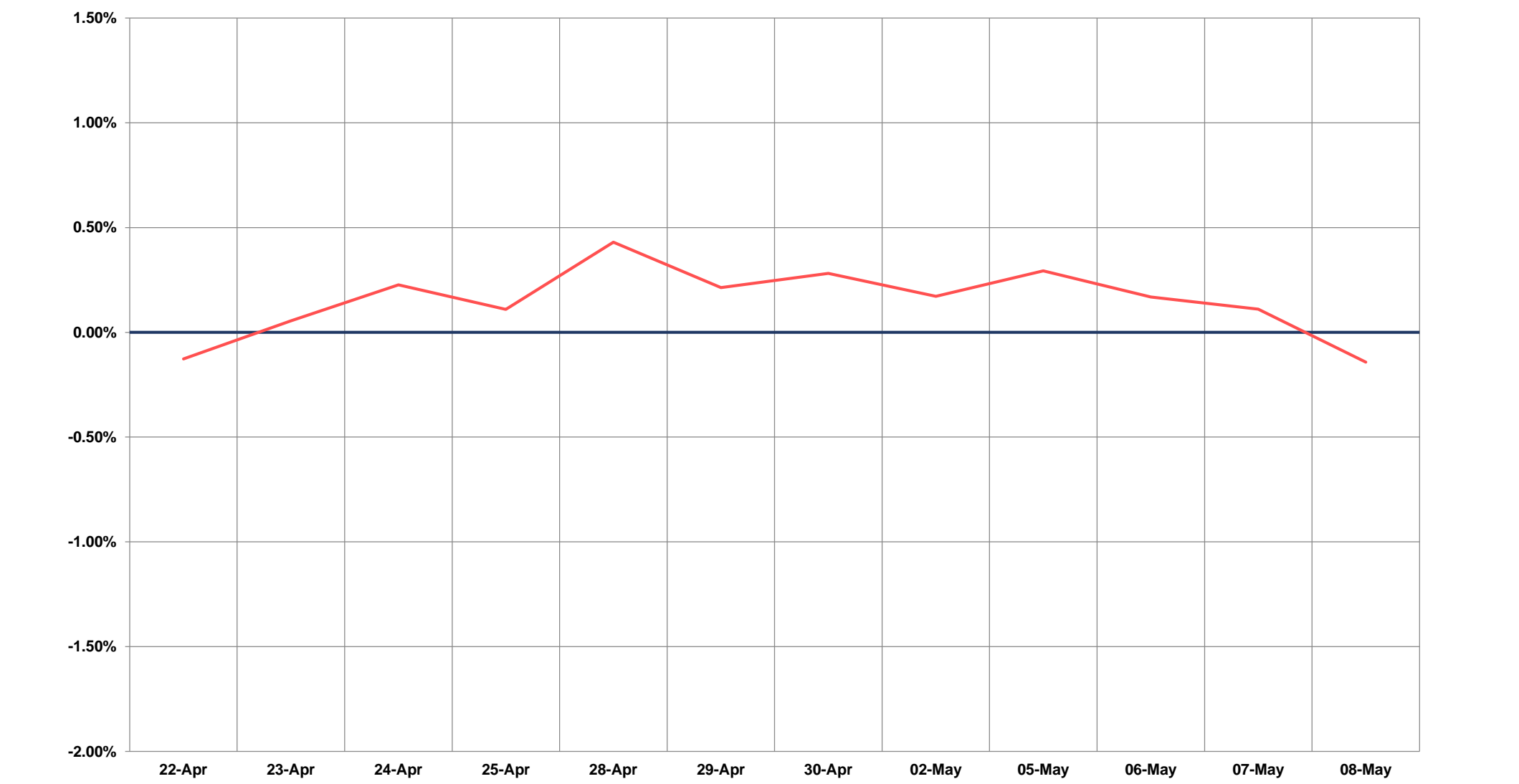
TECHNICAL VIEWS



BANK NIFTY FUTURES



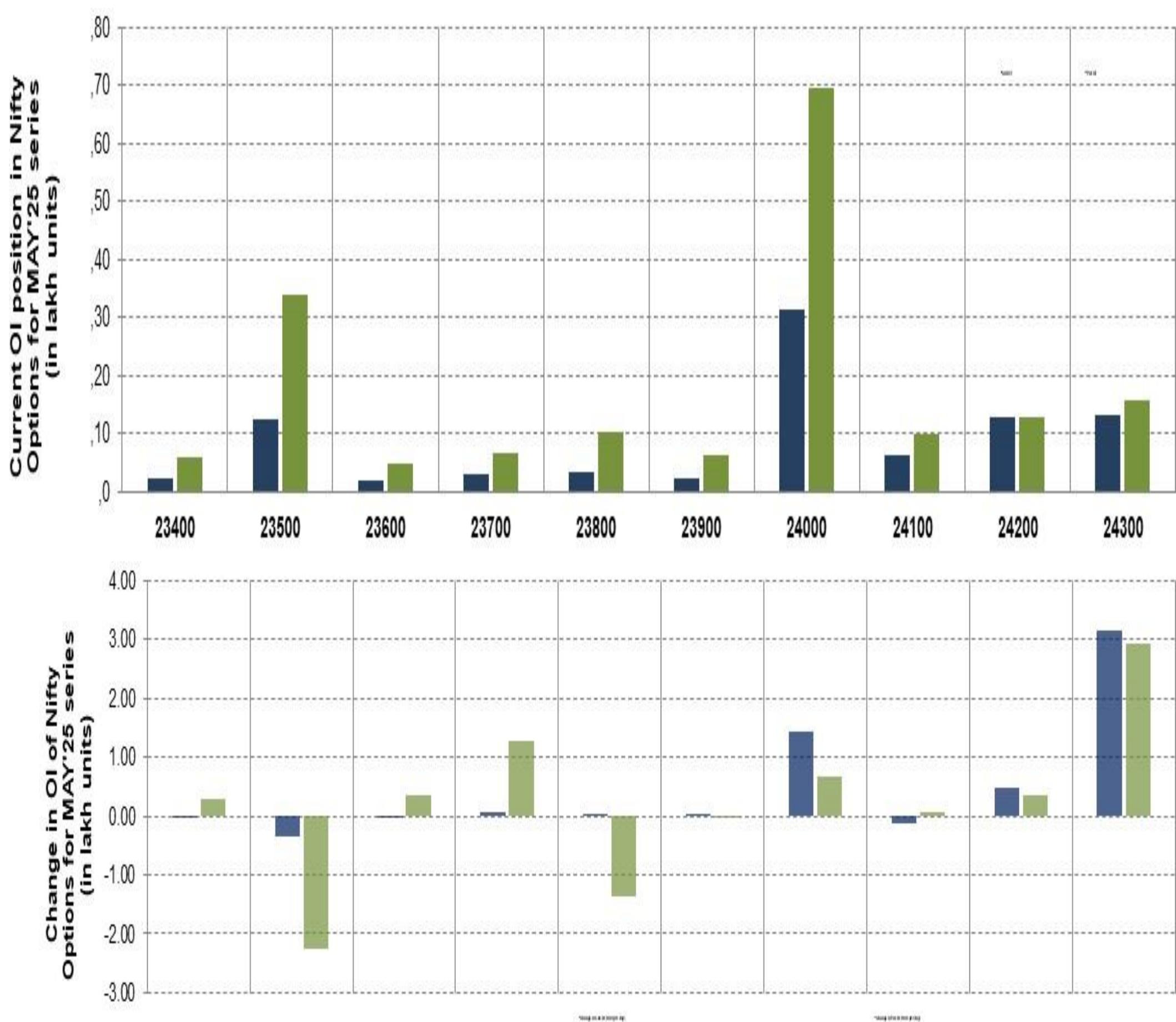
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.31 million in Open Interests is **Strike Price of 24300**
- **Most Active Nifty Put** with an addition of 0.29 millions in Open Interests is **Strike Price of 24300**
- **Maximum Open Interest an outstanding** was 3.39 millions for Calls at **Strike Price of 24000**
- **Maximum Open Interest an outstanding** was 6.95 millions for puts at **Strike Price of 24000**

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