



MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

MAY 13, 2025



Despite a sharp rise in the previous session, Indian equity markets turned negative on Tuesday, with the both Nifty and Sensex crashing over 1.3% on account of profit booking. After a cautious start, markets soon slipped into the red and losses deepened as the day progressed, as traders turned cautious ahead of the U.S. consumer price index (CPI) and retail sales data set to be released tonight.

Some of the important factors in trade:

US-China deal to roll back high tariffs presents challenges, opportunities for India: Traders took note of private report that recent decision by the US and China to suspend their tariff hikes for 90 days presents both challenges and opportunities for India.

India's inflation likely to have cooled down in April: Traders failed to get any sense of relief from a private report stating that led by a further easing in food price rises, the country's consumer or retail inflation is likely to have cooled down to a near six-year low in April 2025.

FII's inflow: Traders overlooked exchange data that showed Foreign Institutional Investors (FIIs) bought equities worth Rs 1,246.48 crore on Monday after a day's breather.

Global front: European markets were trading mostly in green after U.S. President Donald Trump said that the European Union is 'nastier than China' and 'we've just started with them'- signaling tough trade negotiations. Asian markets ended mostly in green as investors heaved a sigh of relief after a temporary halt in the trade war between the US and China eased worries of a global recession.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	81148.22	-1281.68	-1.55
NIFTY	24593.65	-331.05	-1.33
MIDCAP	43806.83	75.23	0.17
SMLCAP	49176.68	482.93	0.99
BSEFMC	20512.53	-221.40	-1.07
HEALTHCARE	41998.59	399.30	0.96
AUTO	51904.89	-505.67	-0.96
POWER	6608.70	-66.84	-1.00
REALTY	6713.39	-56.07	-0.83
BSE IT	36698.0	-829.22	-2.21
BANKEX	62581.45	-551.90	-0.87
OIL GAS	26587.61	-254.78	-0.95
METAL	29834.96	-285.02	-0.95
INDIA VIX	18.20	-0.19	-1.03

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	2076	896	40
BSE	2559	1402	140

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	10551	6859	54
NSE CASH	114943	106751	8
NSE F&O	212129	238422	(11)

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	22.08	3.64	1.13
SENSEX	22.62	4.18	0.97

KEY NUMBERS TRACKER



FII – DII ACTIVITY IN CASH SEGMENT (₹ in Crs)			
FII-DII*	Buy	Sell	Net
DII	16552	12278	4274
FII	17231	17708	(477)

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)			
FII	Buy	Sell	Net
Index Futures	4327.01	10995.29	(6668)
Index Options	1421528.02	1434762.98	(13235)
Stock Futures	20215.85	27456.16	(7240)
Stock Options	70514.24	73529.91	(3016)

PUT-CALL RATIO		
Index	Current	Previous
NIFTY	0.85	1.29
BANK NIFTY	0.83	0.91

DOLLAR INDEX			
Dollar Index	Current	Previous	% Change
DXY	101.63	101.77	-0.14

10-YEARS G-SEC YIELD			
Country	Current	Previous	% Change
INDIA	6.281	6.337	-1.51
USA	4.445	4.457	0.00

KEY COMMODITIES TRACKER (in \$)			
Commodity	Current	Change Points	% Change
Gold	3251.95	15.20	0.47
Silver	32.98	0.41	1.26
Crude-Oil	62.52	0.57	0.92
Brent-Crude	65.49	0.53	0.82

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES			
Expiry	Close	Change Points	% Change
28 MAY-25 USD-INR	85.36	-0.15	-0.18
28 MAY-25 EUR-INR	94.88	-1.42	-1.48
28 MAY-25 GBP-INR	112.80	-0.74	-0.65
28 MAY-25 JPY- INR	57.80	-1.20	-2.03

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS						
Index	Close	S2	S1	Pivot	R1	R2
NIFTY	24578	24274	24426	24700	24852	25126
SENSEX	81148	80059	80604	81588	82133	83117
NIFTY FUTURES	24640	24335	24488	24766	24918	25196
BANK NIFTY	54941	54499	54720	55110	55331	55721
CNX IT	37355	36641	36998	37662	38019	38683
CNX MIDCAP	55521	54996	55258	55527	55790	56059
CNX SMALLCAP	16903	16668	16786	16850	16967	17031
INDIA VIX	18.20	17.32	17.76	18.33	18.77	19.34

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

SECURITIES BAN IN F&O TRADES FOR 14-05-2025
CDSL, MANAPPURAM

TECHNICAL VIEWS



NIFTY

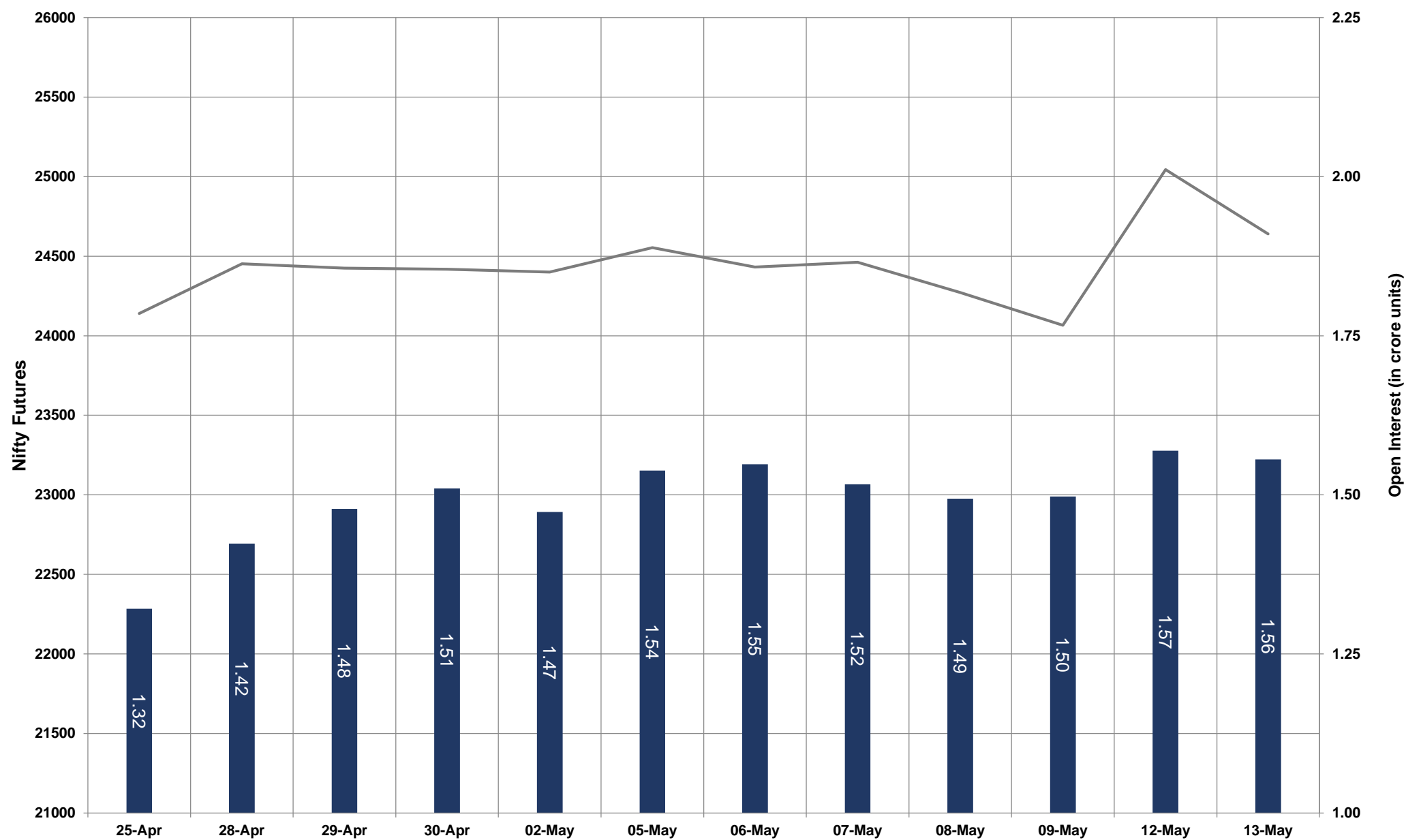


- Nifty Cash = **24593.65 (-1.33%)**
- Resistance levels = **24800** and **24950**
- Support levels = **24400** and **24220**

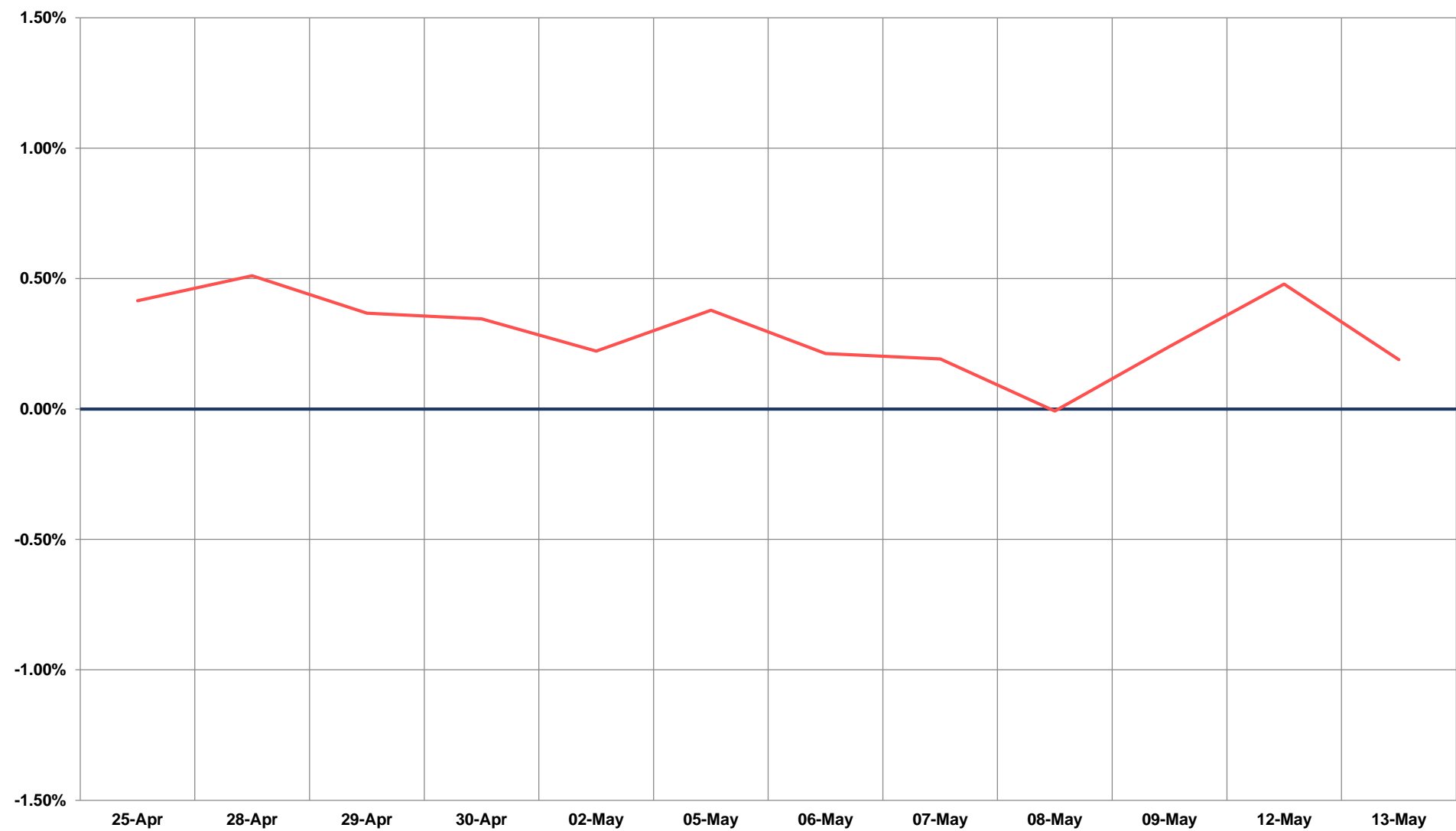
TECHNICAL VIEWS



NIFTY FUTURES



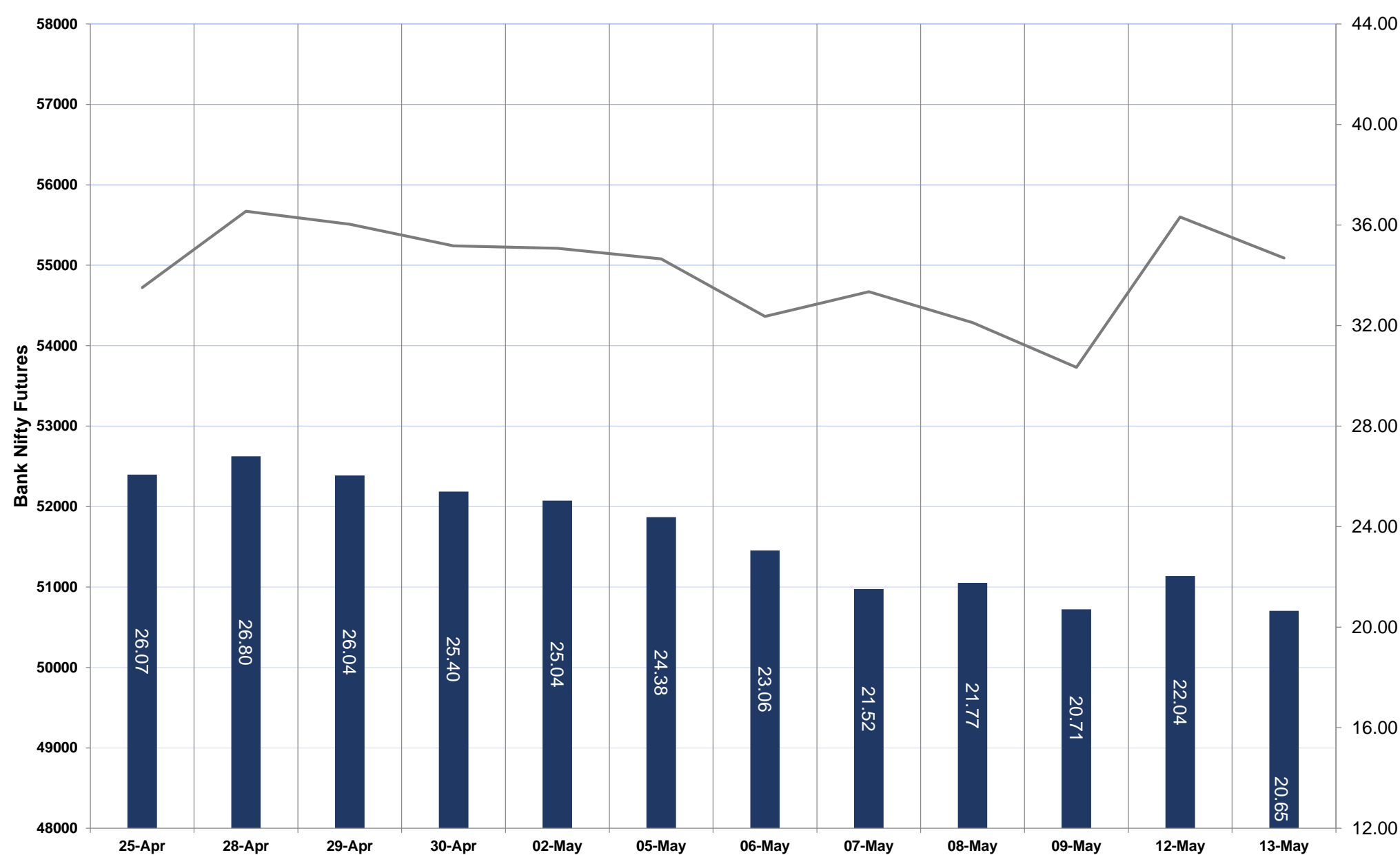
SPREAD: FUTURE & SPOT



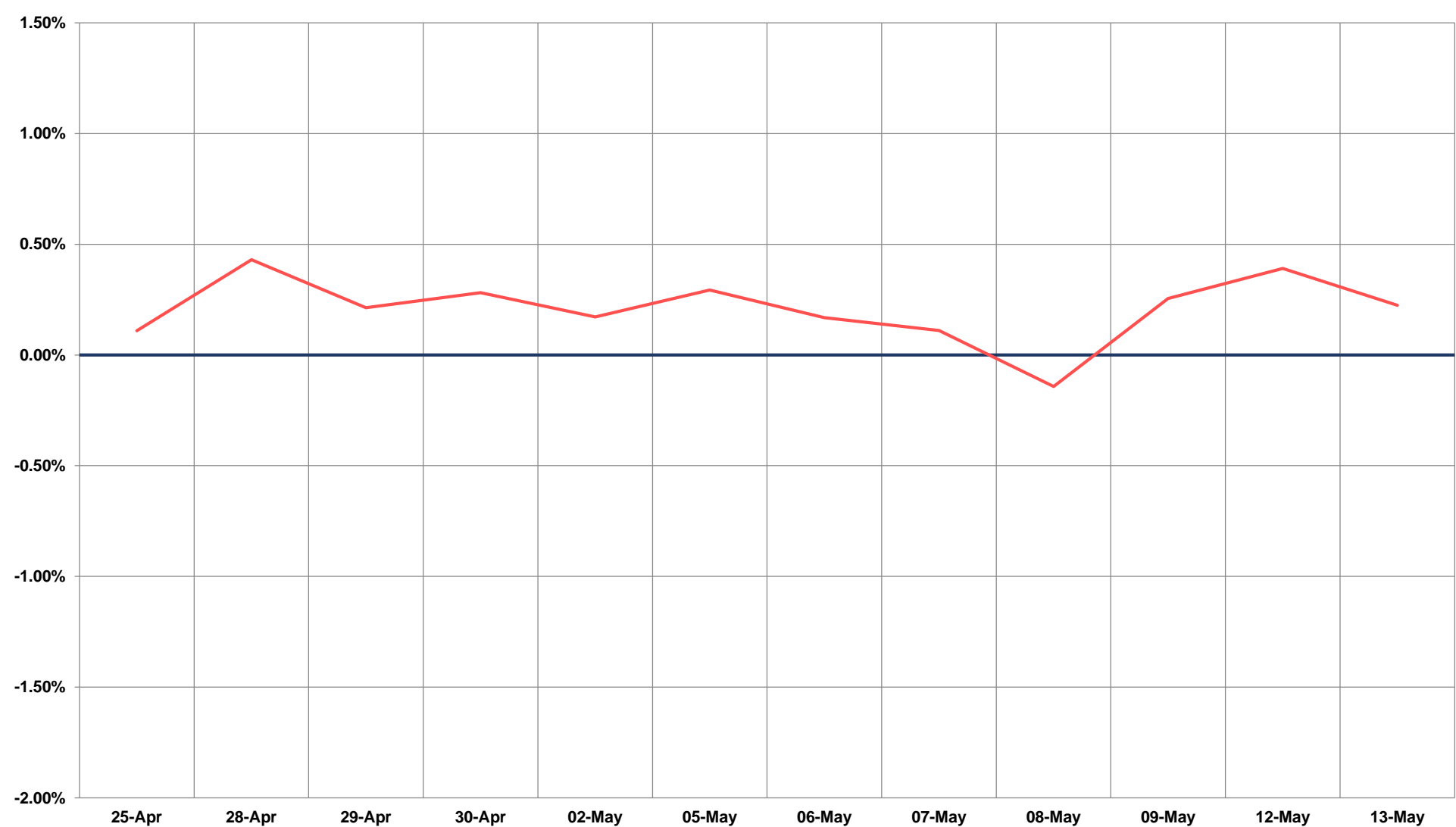
TECHNICAL VIEWS



BANK NIFTY FUTURES



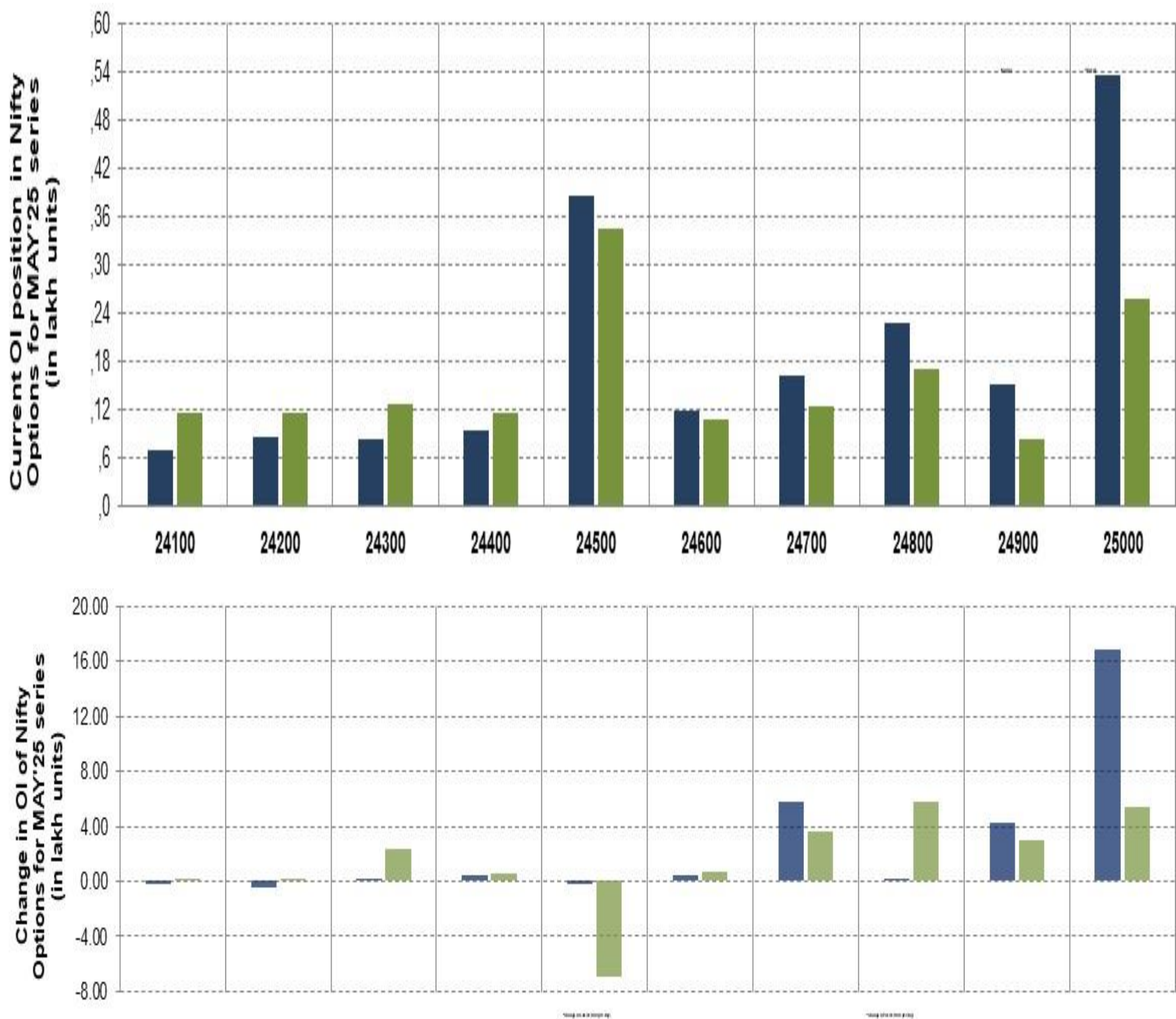
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 1.68 million in Open Interests is **Strike Price of 25000**
- **Most Active Nifty Put** with a reduction of 0.69 millions in Open Interests is **Strike Price of 24500**
- **Maximum Open Interest** an outstanding was 5.36 millions for Calls at **Strike Price of 25000**
- **Maximum Open Interest** an outstanding was 3.45 millions for puts at **Strike Price of 24500**

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