



# MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

MAY 14, 2025



After a heavy sell-off in the previous session, Local equity benchmarks ended in a positive terrain on Wednesday, amid easing wholesale price index (WPI) inflation and supportive cues from other Asian markets. Markets made an optimistic start, as sentiments got boost after the official data showed India's consumer price inflation eased further in April to the lowest level in nearly six years amid a slower rise in food prices. In afternoon session, indices came off from day's high points, but managed to end on higher note.

Some of the important factors in today's trade:

India's WPI inflation eases to 0.85% in April: Sentiments got boost after the government data showed that India's wholesale inflation eased further to 0.85% in April on an annual basis as against a four-month low of 2.05% in March.

India reserves right to impose retaliatory duty on US goods: Traders took a note of report that India has 'only' reserved its right under WTO norms to impose retaliatory duties on certain American products over the US' steel and aluminum tariffs and it may choose to resolve the issue through the ongoing bilateral trade agreement (BTA) negotiations between the two countries.

Investors show strong faith in India's economy, PM's policies: Sentiments remained upbeat with Union Minister Ashwini Vaishnaw's statement that the investors have continued to exude a high level of confidence in India's economy, the Prime Minister's policy and the country's talent.

Global front: European markets were trading in red, as traders overlooked Germany's consumer price inflation softened to a six-month low in April. Asian markets ended mostly in green as producer prices in Japan were up 0.2 percent on month in April, slowing from 0.4 percent in March.

# MARKET SELFIE



## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	81330.56	182.34	0.22
NIFTY	24666.90	88.55	0.36
MIDCAP	44327.28	520.45	1.19
SMLCAP	49978.95	802.27	1.63
BSEFMC	20546.15	33.62	0.16
HEALTHCARE	42262.98	264.39	0.63
AUTO	52350.26	445.37	0.86
POWER	6657.14	48.44	0.73
REALTY	6828.47	115.08	1.71
BSE IT	37199.30	501.30	1.37
BANKEX	62371.60	-209.85	-0.34
OIL GAS	26974.55	386.94	1.46
METAL	30569.71	734.75	2.46
INDIA VIX	17.23	-0.97	-5.33

## ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	2375	600	37
BSE	2860	1124	141

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	8395	10551	(20)
NSE CASH	115850	114943	1
NSE F&O	187759	212129	(11)

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	22.14	3.65	1.13
SENSEX	22.67	4.19	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	3577.76	3320.25	258
Index Options	1701620.32	1702994.86	(1375)
Stock Futures	20377.46	20196.72	181
Stock Options	71300.15	73611.56	(2311)

PUT-CALL RATIO		
Index	Current	Previous
NIFTY	0.88	0.85
BANK NIFTY	0.83	0.83

DOLLAR INDEX			
Dollar Index	Current	Previous	% Change
DXY	100.39	100.93	-0.54

10-YEARS G-SEC YIELD			
Country	Current	Previous	% Change
INDIA	6.241	6.285	-0.70
USA	4.464	4.499	-0.82

KEY COMMODITIES TRACKER (in \$)			
Commodity	Current	Change Points	% Change
Gold	3234.27	-19.89	-0.61
Silver	32.79	-0.15	-0.48
Crude-Oil	62.85	-0.82	-1.29
Brent-Crude	65.76	-0.87	-1.31

# CURRENCY FUTURES & INDEX TRENDS TRACKER



## CURRENCY FUTURES

Expiry	Close	Change Points	% Change
28 MAY-25 USD-INR	85.39	0.03	0.03
28 MAY-25 EUR-INR	95.86	0.99	1.04
28 MAY-25 GBP-INR	113.92	1.17	1.03
28 MAY-25 JPY- INR	58.49	0.65	1.12

## INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS

Index	Close	S2	S1	Pivot	R1	R2
NIFTY	24667	24425	24546	24657	24778	24889
SENSEX	81331	80529	80930	81311	81712	82093
NIFTY FUTURES	24716	24445	24581	24708	24843	24970
BANK NIFTY	54801	54116	54459	54834	55176	55551
CNX IT	37854	37181	37517	37716	38052	38250
CNX MIDCAP	56136	55279	55708	55953	56381	56626
CNX SMALLCAP	17147	16851	16999	17079	17228	17308
INDIA VIX	17.23	15.69	16.46	17.85	18.62	20.01

## 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 15-05-2025

**CDSL, HINDCOPPER, MANAPPURAM**



# TECHNICAL VIEWS



## NIFTY

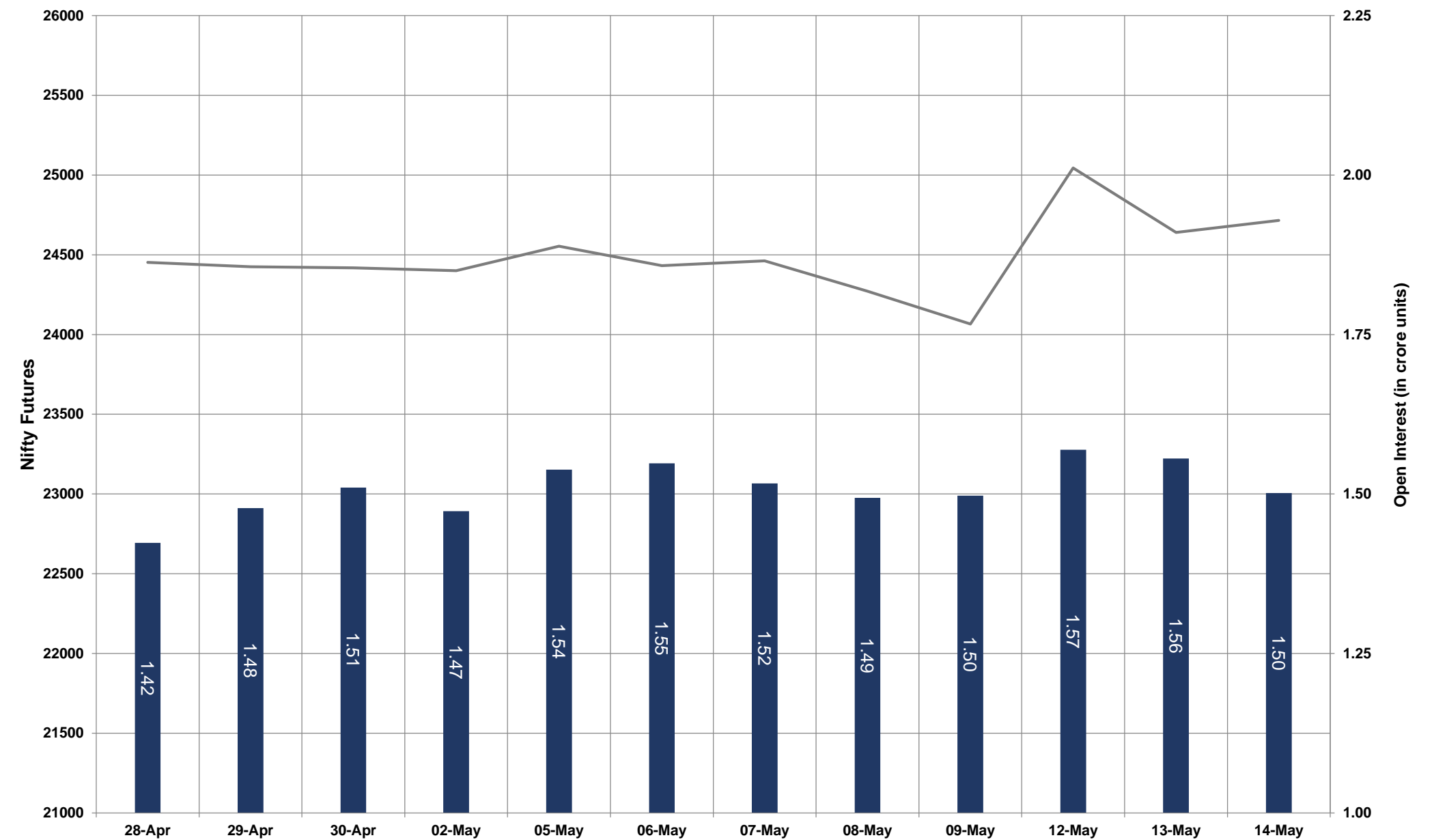


- Nifty Cash = **24593.65 (-1.33%)**
- Resistance levels = **24800** and **24950**
- Support levels = **24400** and **24220**

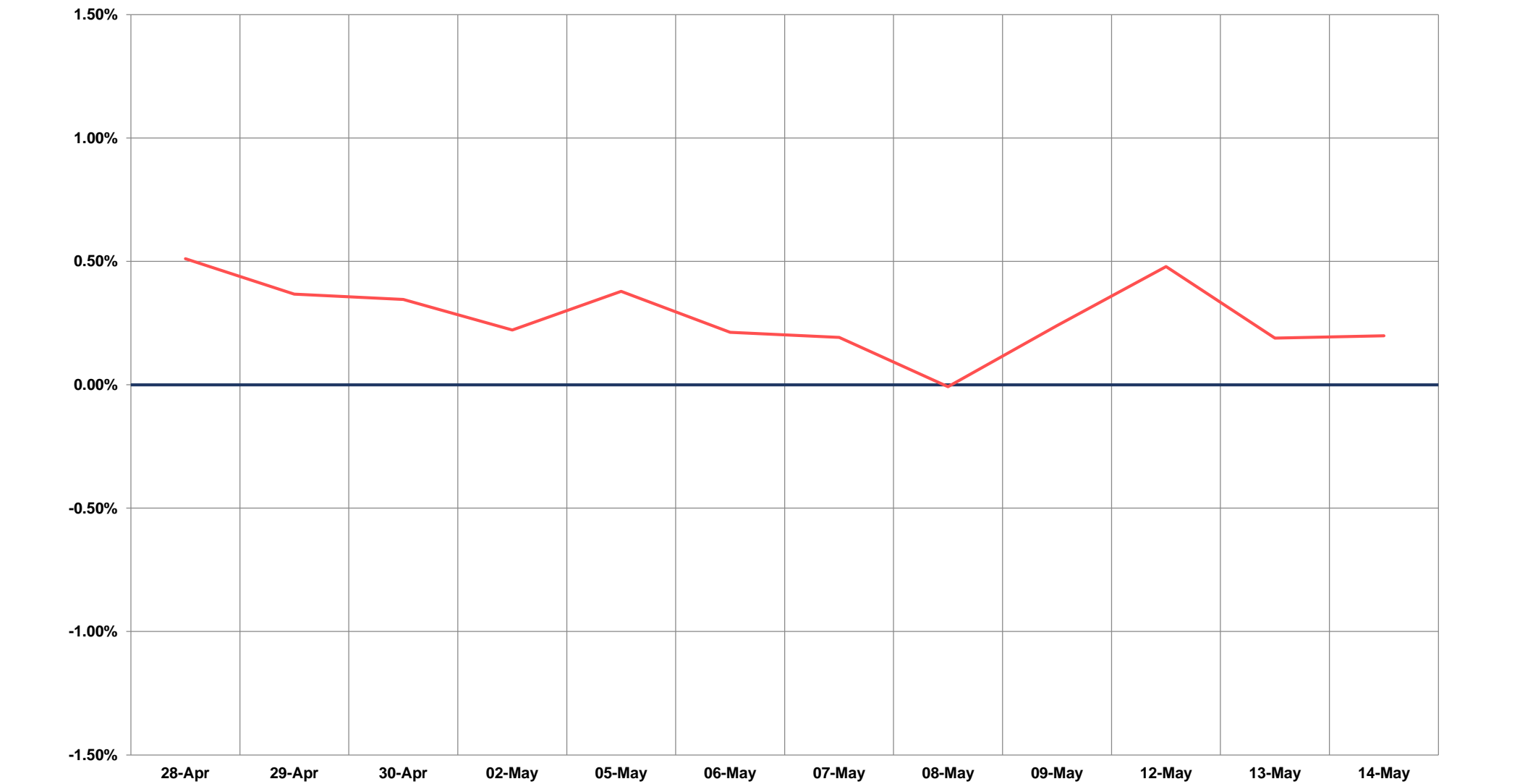
# TECHNICAL VIEWS



## NIFTY FUTURES



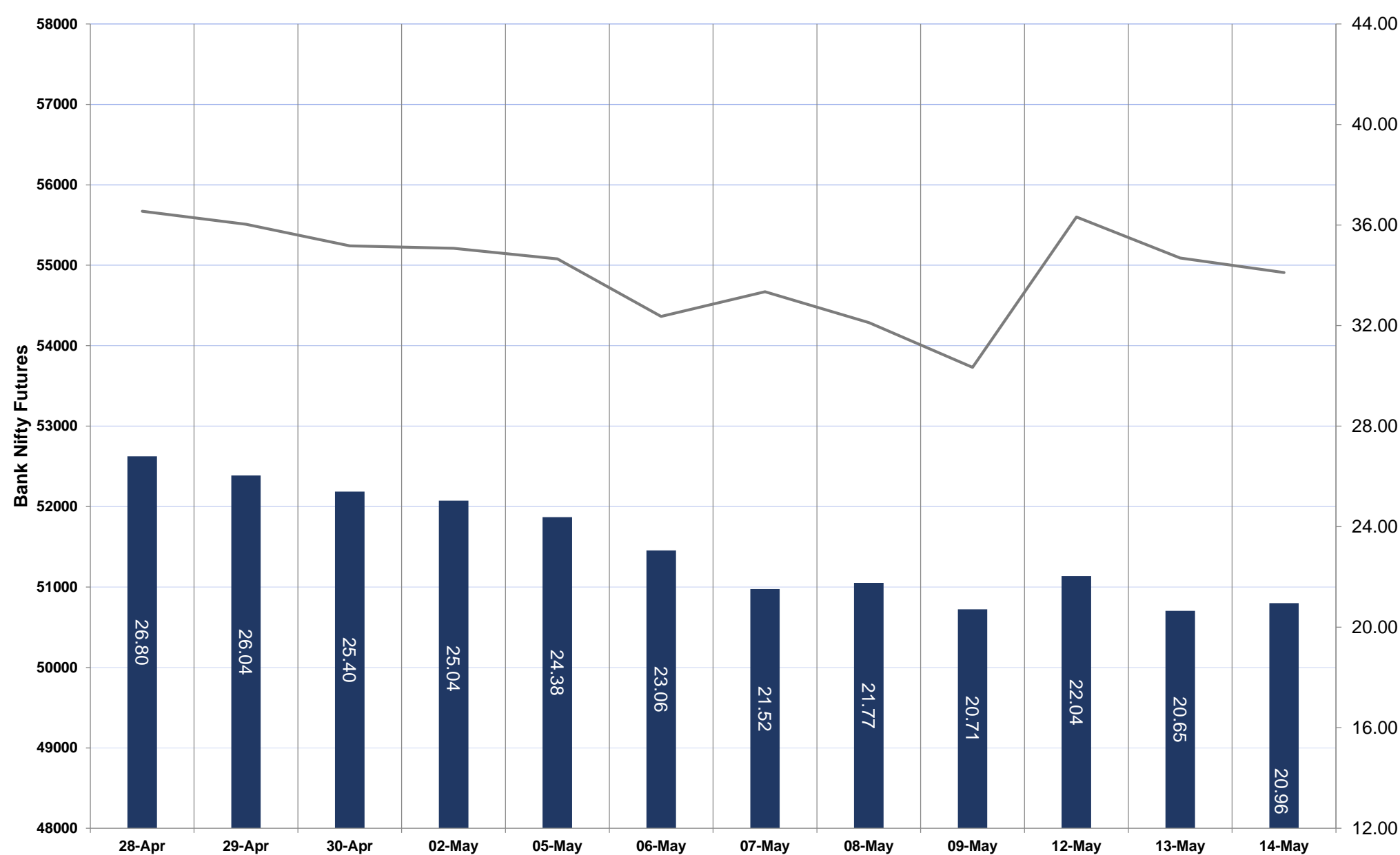
## SPREAD: FUTURE & SPOT



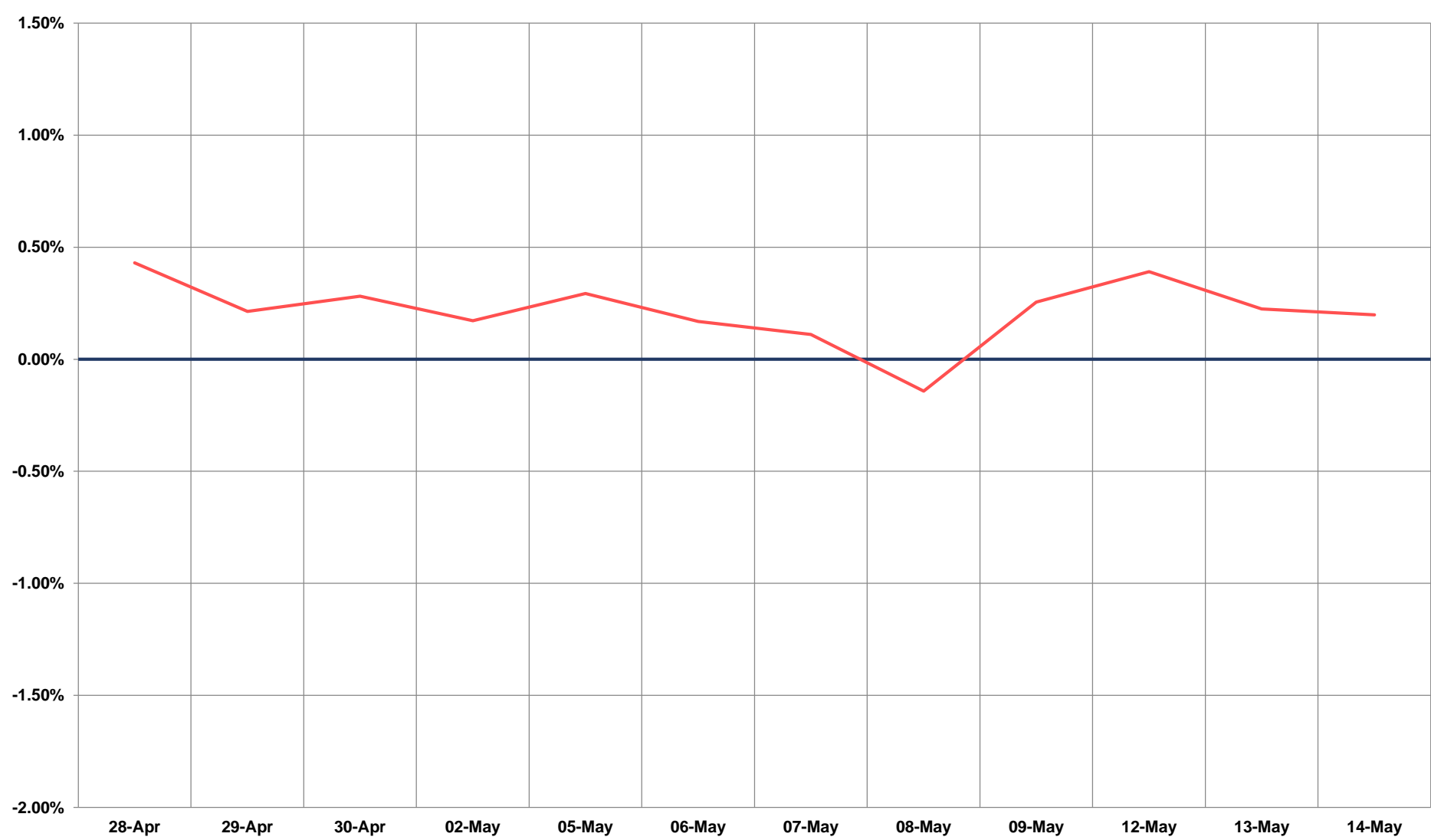
# TECHNICAL VIEWS



## BANK NIFTY FUTURES



## SPREAD: FUTURE & SPOT

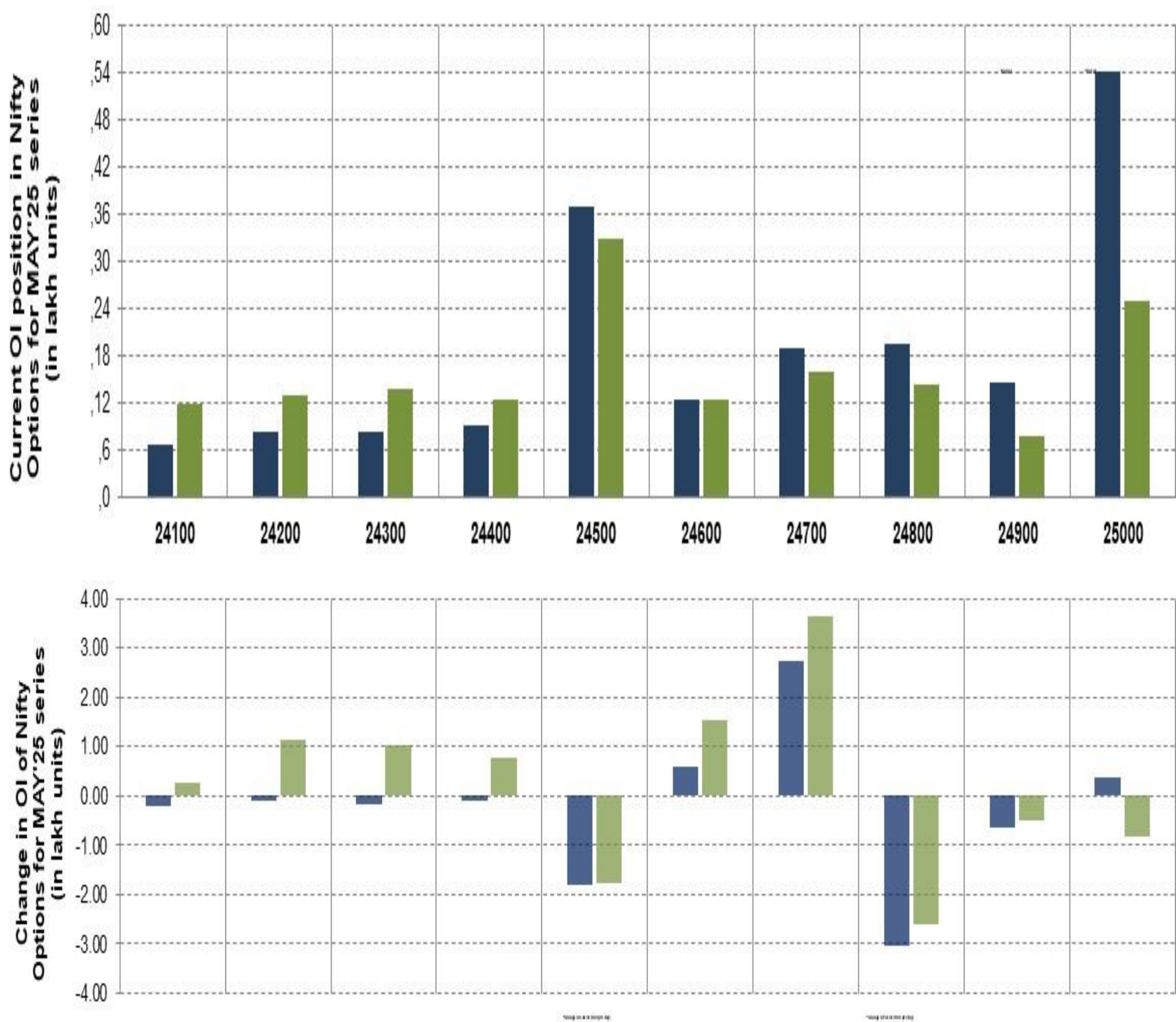




# TECHNICAL VIEWS



## NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.27 million in Open Interests is **Strike Price of 24700**
- **Most Active Nifty Put** with an addition of 0.36 millions in Open Interests is **Strike Price of 24700**
- **Maximum Open Interest an outstanding** was 5.39 millions for Calls at **Strike Price of 25000**
- **Maximum Open Interest an outstanding** was 3.27 millions for puts at **Strike Price of 24500**

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