



# MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

MAY 19, 2025



Indian equity benchmarks closed in negative territory on Monday, weighed down by weak global cues. Markets made a cautious start, pressured by selling in IT and TECK stocks, as overall sentiment remained subdued following Moody's downgrade of the U.S. government's credit rating on Friday. In afternoon session, indices slipped into deep red and remained lower till end of the day.

Some of the important factors in today's trade:

US remittance tax plan may hit Indian households, rupee: Some cautiousness came as think tank GTRI said that a proposed 5 per cent US tax on remittances sent abroad by non-citizens is raising alarm in India as it may hit Indian households and the rupee.

India, EU conclude another round of FTA talks: Traders took note of the India and the European Union (EU) chief negotiators have concluded another round of talks on the proposed free trade agreement (FTA) and agreed to reach a deal in two phases.

India's forex reserves hit 7-month high of \$690.6 billion: Traders overlooked Reserve Bank of India (RBI) data showed that India's foreign exchange reserves (forex) rose \$4.553 billion to \$690.617 billion in the week that ended on May 9.

Global front: European markets were trading in red, as investors reacted to Moody's downgrade of U.S. credit rating and mixed economic data from China. Asian markets ended mostly in red despite China's industrial production increased more than expected in April. Industrial output logged an annual growth of 6.1 percent in April after rising 7.7 percent in March.

# MARKET SELFIE



## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	82059.42	-271.17	-0.33
NIFTY	24945.45	-74.35	-0.30
MIDCAP	45127.64	121.80	0.27
SMLCAP	51429.95	384.21	0.75
BSEFMC	20791.23	-15.59	-0.07
HEALTHCARE	42690.21	248.23	0.58
AUTO	53880.99	221.70	0.41
POWER	6838.94	24.54	0.36
REALTY	7233.29	157.39	2.22
BSE IT	36938.23	-459.15	-1.23
BANKEX	62984.85	17.68	0.03
OIL GAS	27320.44	-86.75	-0.32
METAL	31010.91	12.70	0.04
INDIA VIX	17.36	0.84	4.89

## ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1977	1018	52
BSE	2531	1565	177

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	8630	10699	(19)
NSE CASH	158343	149816	6
NSE F&O	116116	162308	(28)

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	22.33	3.69	1.14
SENSEX	22.87	4.22	0.99

# KEY NUMBERS TRACKER



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

FII-DII*	Buy	Sell	Net
DII	10988	11226	(238)
FII	11817	12343	(526)

Note: FPI & DII Figures are provisional

## FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	2563.83	2650.58	(87)
Index Options	777646.50	776709.44	937
Stock Futures	19047.23	22761.81	(3715)
Stock Options	75783.76	78655.11	(2871)

## PUT-CALL RATIO

Index	Current	Previous
NIFTY	0.83	0.97
BANK NIFTY	0.87	0.90

## DOLLAR INDEX

Dollar Index	Current	Previous	% Change
DXY	100.15	100.76	-0.61

## 10-YEARS G-SEC YIELD

Country	Current	Previous	% Change
INDIA	6.222	6.231	-0.14
USA	4.557	4.439	2.66

## KEY COMMODITIES TRACKER (in \$)

Commodity	Current	Change Points	% Change
Gold	3242.80	43.67	1.37
Silver	32.58	0.32	1.00
Crude-Oil	62.05	-0.44	-0.70
Brent-Crude	64.63	-0.79	-1.21

# CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES			
Expiry	Close	Change Points	% Change
28 MAY-25 USD-INR	85.46	-0.15	-0.18
28 MAY-25 EUR-INR	96.30	0.31	0.32
28 MAY-25 GBP-INR	114.45	0.62	0.55
28 MAY-25 JPY- INR	59.11	0.21	0.35

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS						
Index	Close	S2	S1	Pivot	R1	R2
NIFTY	24945	24829	24887	24975	25033	25121
SENSEX	82059	81690	81875	82149	82334	82609
NIFTY FUTURES	24976	24851	24914	25015	25078	25180
BANK NIFTY	55421	55072	55246	55471	55645	55870
CNX IT	37478	37121	37299	37608	37787	38096
CNX MIDCAP	57105	56490	56798	57125	57433	57760
CNX SMALLCAP	17650	17423	17536	17651	17764	17878
INDIA VIX	17.36	15.26	16.31	16.88	17.93	18.50

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

SECURITIES BAN IN F&O TRADES FOR 20-05-2025
HINDCOPPER, MANAPPURAM, TITAGARH



# TECHNICAL VIEWS



## NIFTY

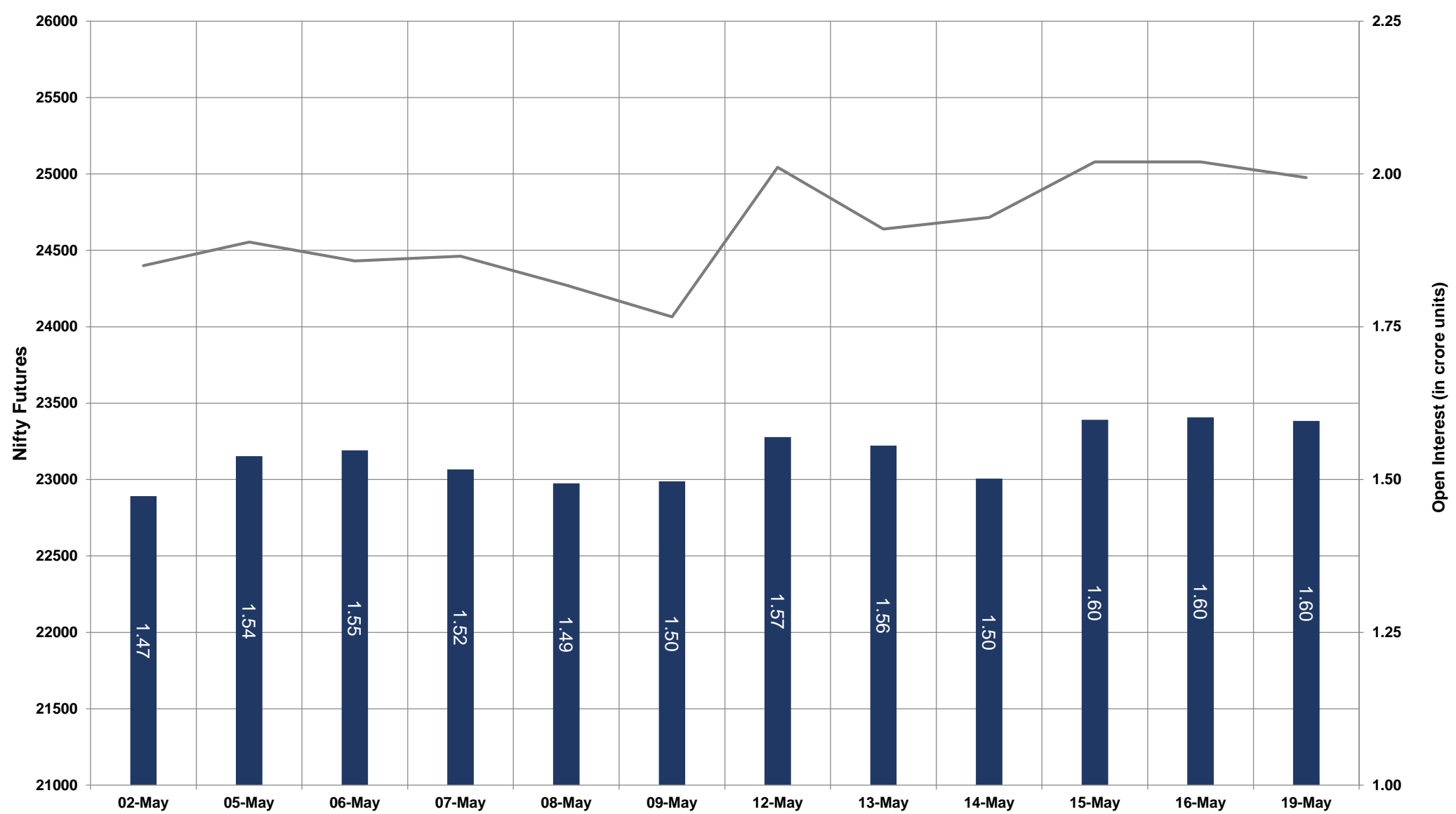


- Nifty Cash = **24945.45 (-0.30%)**
- Resistance levels = **25150** and **25300**
- Support levels = **24870** and **24800**

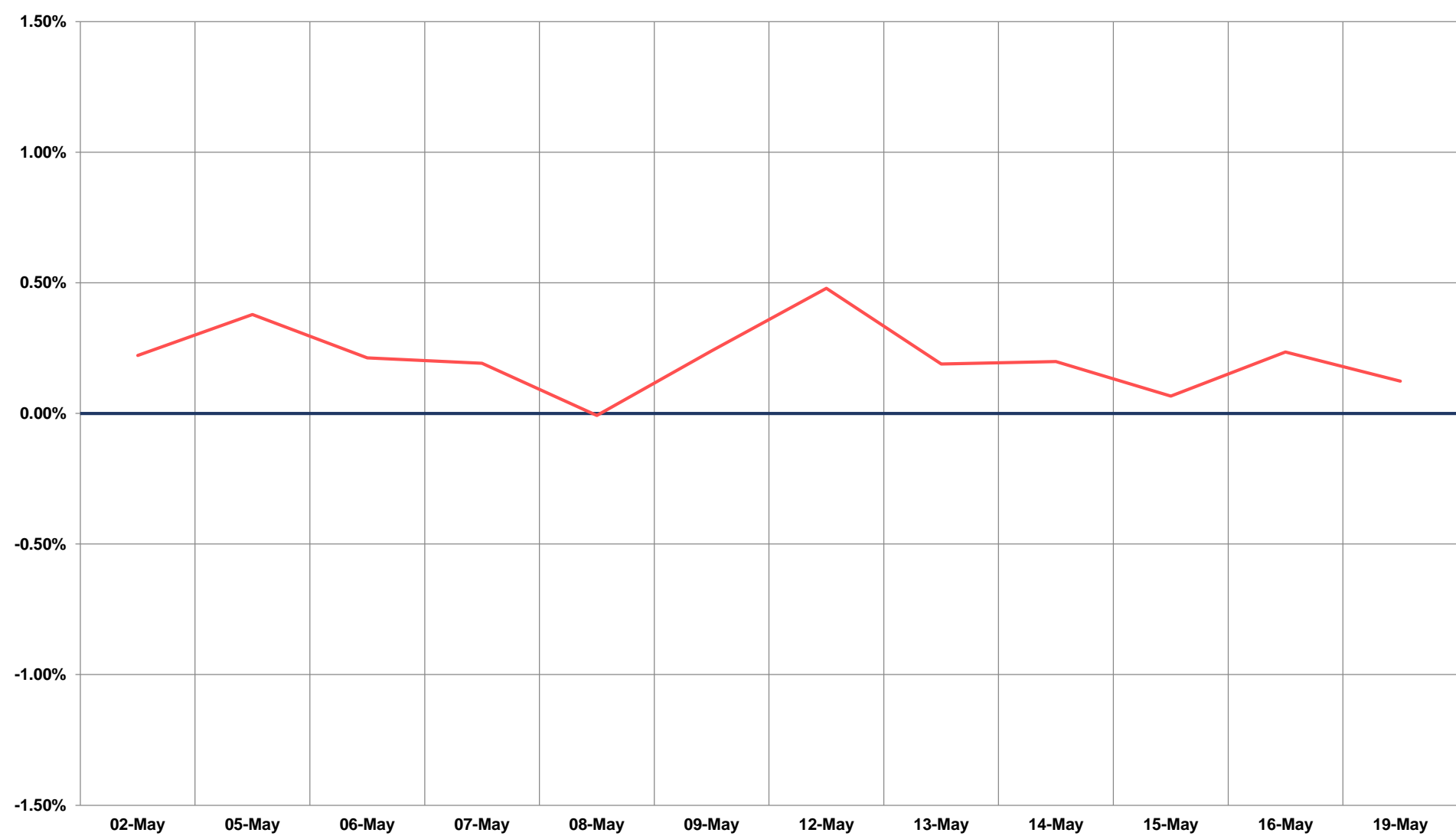
# TECHNICAL VIEWS



## NIFTY FUTURES



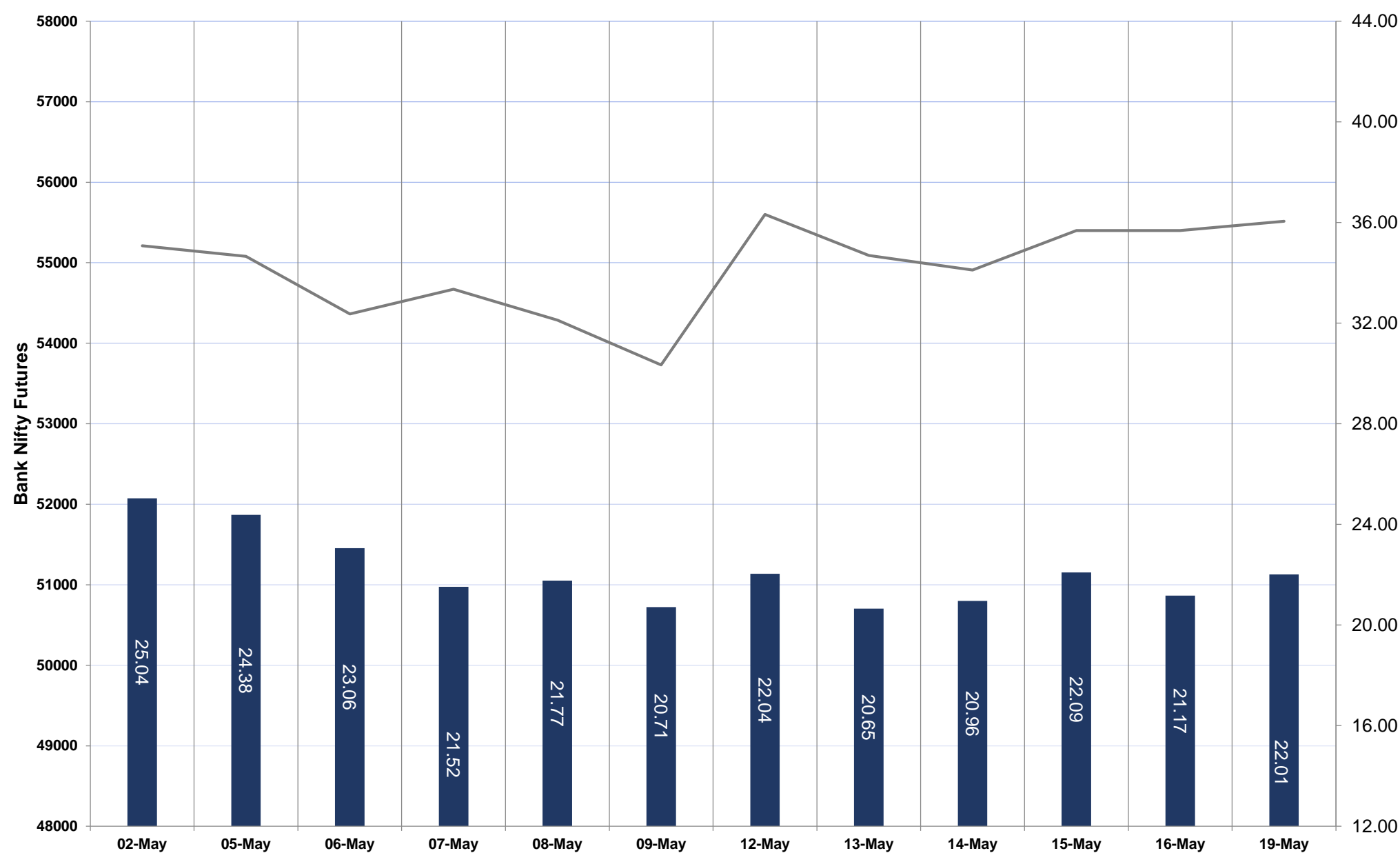
## SPREAD: FUTURE & SPOT



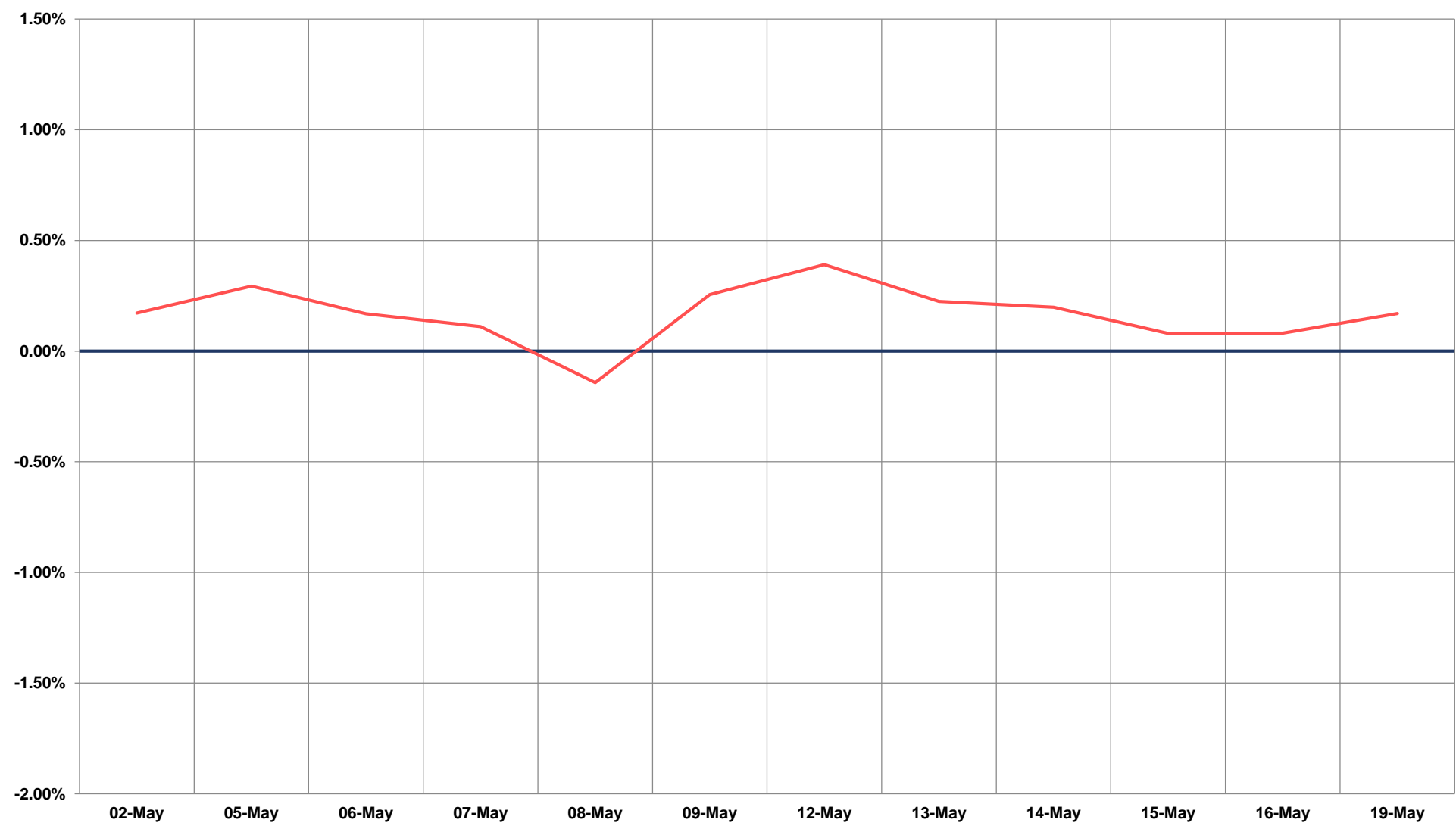
# TECHNICAL VIEWS



## BANK NIFTY FUTURES



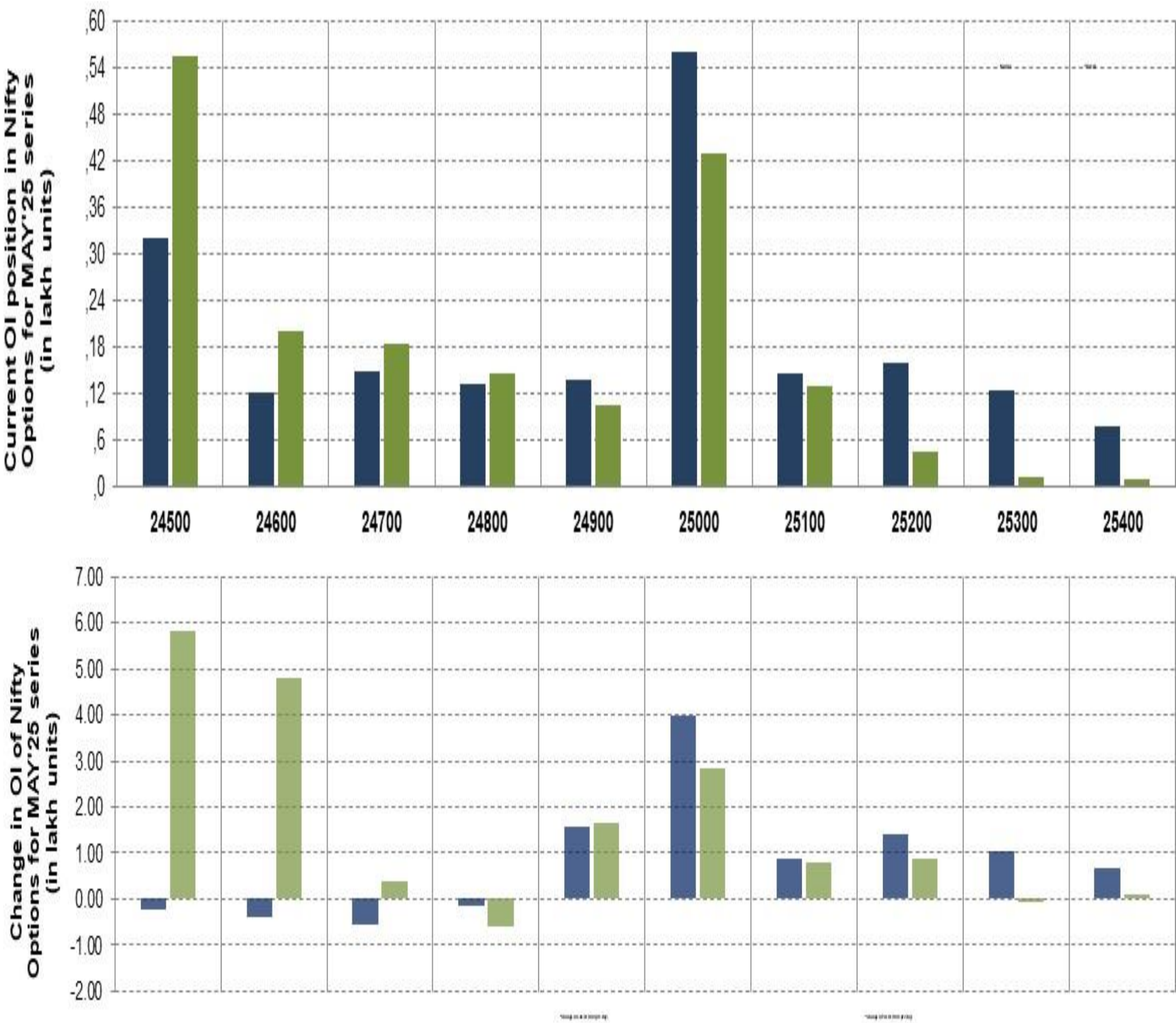
## SPREAD: FUTURE & SPOT







NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.39 million in Open Interests is **Strike Price of 25000**
- **Most Active Nifty Put** with an addition of 0.58 millions in Open Interests is **Strike Price of 24500**
- **Maximum Open Interest an outstanding** was 5.59 millions for Calls at **Strike Price of 25000**
- **Maximum Open Interest an outstanding** was 5.55 millions for puts at **Strike Price of 24500**

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