



# MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

MAY 28, 2025



Local equity benchmarks ended marginally lower on Wednesday, weighed down by delays in finalizing the India-U.S. trade agreement and the upcoming monthly F&O expiry. After a cautious start, soon indices slipped into the red and remained in negative territory throughout the session as sentiment remained subdued ahead of the release of April's industrial and manufacturing production data later in the day.

Some of the important factors in today's trade:

India's FDI inflows decline 24.5% in January-March quarter of 2024-25: Traders remained cautious as the government data showed that Foreign direct investment (FDI) equity inflow in India fell 24.5 per cent year-on-year to \$9.34 billion in the January-March quarter of 2024-25 but grew 13 per cent at \$50 billion during the entire previous financial year.

IMD forecasts above-normal southwest monsoon rainfall for 2025: Traders took note of the India Meteorological Department (IMD), under the Ministry of Earth Sciences, has issued its updated Long-Range Forecast for the 2025 Southwest Monsoon season (June-September) along with the Monthly Rainfall and Temperature Outlook for June 2025.

India's goods, services exports likely to reach \$1 trillion this fiscal: Traders overlooked the apex exporters' body -- Federation of Indian Export Organisations (FIEO) has suggested that the country's overall goods and services exports are likely to reach \$1 trillion during 2025-26. Meanwhile, the exports were aggregated at \$825 billion in 2024-25.

Global front: European markets were trading in red despite the U.S. President Donald Trump's decision to pause tariffs on EU goods till July 9th and upcoming bond sales in Germany and Spain. Asian markets ended in mixed amid ongoing uncertainty about Us-China trade relations.

# MARKET SELFIE



## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	81312.32	-239.31	-0.29
NIFTY	24752.45	-73.75	-0.30
MIDCAP	45093.52	-98.28	-0.22
SMLCAP	52122.64	257.35	0.50
BSEFMC	20411.89	-275.96	-1.33
HEALTHCARE	42500.10	-166.05	-0.39
AUTO	52583.25	-353.47	-0.67
POWER	6810.72	-13.73	-0.20
REALTY	7320.03	-8.35	-0.11
BSE IT	37022.01	-3.45	-0.01
BANKEX	62789.42	33.60	0.05
OIL GAS	27301.14	39.81	0.15
METAL	31011.27	-216.26	-0.69
INDIA VIX	18.02	-0.52	-2.80

## ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1571	1353	42
BSE	2022	1928	156

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	7404	9416	(21)
NSE CASH	112539	119285	(6)
NSE F&O	364323	431025	(15)

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	22.32	3.66	1.16
SENSEX	22.74	4.19	1.02

# KEY NUMBERS TRACKER



FII – DII ACTIVITY IN CASH SEGMENT (₹ in Crs)			
FII-DII*	Buy	Sell	Net
DII	17644	9732	7912
FII	16279	11616	4663

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)			
FII	Buy	Sell	Net
Index Futures	7272.30	9372.50	(2100)
Index Options	1327796.27	1426580.77	(98785)
Stock Futures	98468.83	102282.27	(3813)
Stock Options	63213.07	66905.17	(3692)

PUT-CALL RATIO		
Index	Current	Previous
NIFTY	0.76	0.82
BANK NIFTY	0.85	0.88

DOLLAR INDEX			
Dollar Index	Current	Previous	% Change
DXY	99.58	99.55	0.03

10-YEARS G-SEC YIELD			
Country	Current	Previous	% Change
INDIA	6.222	6.231	-0.14
USA	4.446	4.434	0.27

KEY COMMODITIES TRACKER (in \$)			
Commodity	Current	Change Points	% Change
Gold	3313.24	4.07	0.12
Silver	33.29	0.02	0.08
Crude-Oil	61.44	0.55	0.90
Brent-Crude	64.63	0.54	0.84



# CURRENCY FUTURES & INDEX TRENDS TRACKER



## CURRENCY FUTURES

Expiry	Close	Change Points	% Change
26 JUNE-25 USD-INR	85.57	-0.01	-0.01
26 JUNE-25 EUR-INR	97.00	-0.19	-0.19
26 JUNE-25 GBP-INR	115.27	-0.53	-0.46
26 JUNE-25 JPY- INR	59.50	3.16	5.61

## INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS

Index	Close	S2	S1	Pivot	R1	R2
NIFTY	24752	24657	24705	24785	24832	24912
SENSEX	81312	81021	81166	81390	81536	81759
NIFTY FUTURES	24763	24647	24705	24800	24858	24954
BANK NIFTY	55417	55105	55261	55391	55547	55678
CNX IT	37466	37225	37345	37561	37682	37898
CNX MIDCAP	57141	56833	56987	57232	57386	57631
CNX SMALLCAP	17784	17712	17748	17795	17831	17879
INDIA VIX	18.02	17.15	17.59	18.31	18.75	19.47

## INDEX TREND ANALYSIS

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

## SECURITIES BAN IN F&O TRADES FOR 29-05-2025

	NIL
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# TECHNICAL VIEWS



## NIFTY

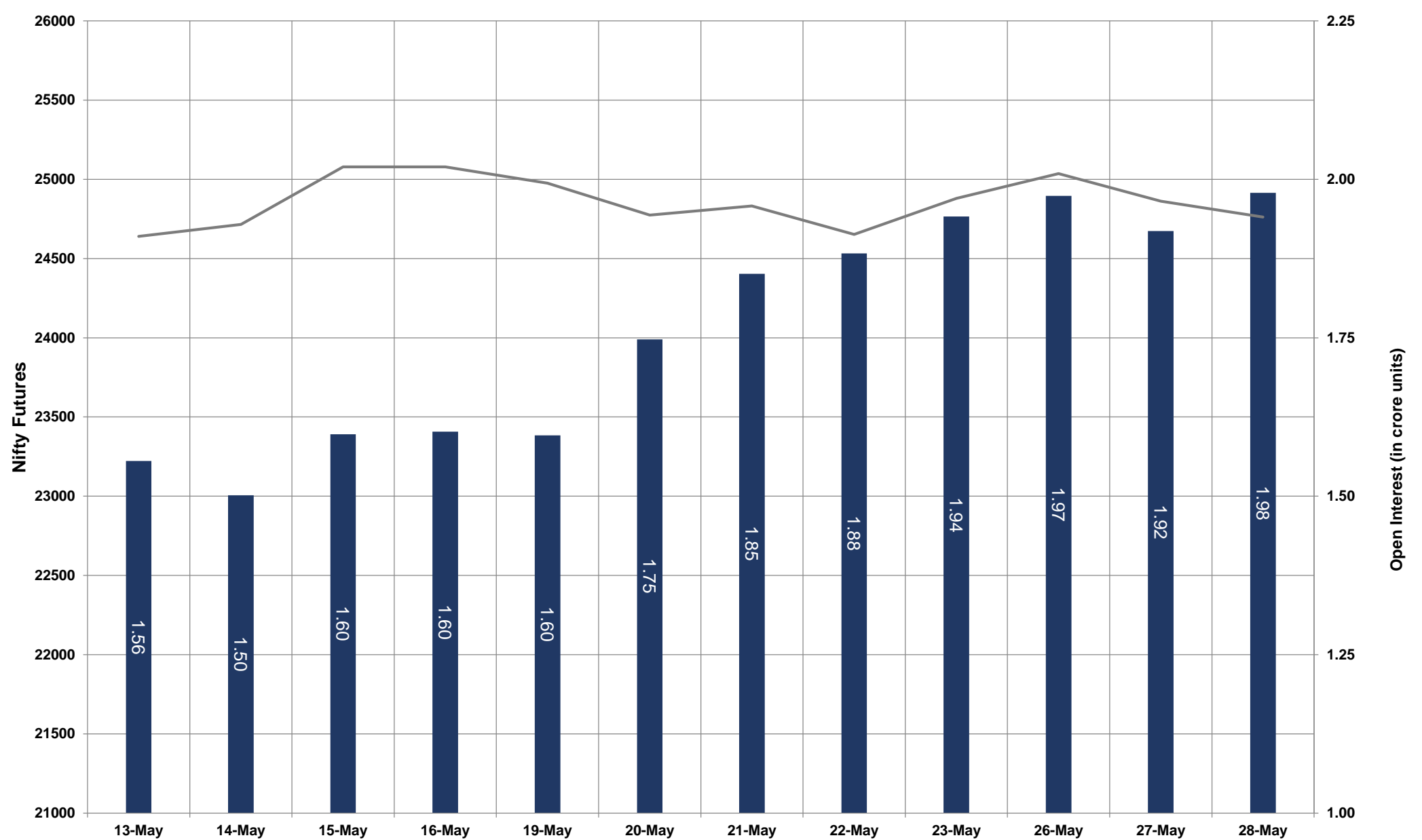


- Nifty Cash = **24752.45 (-0.30%)**
- Resistance levels = **24980** and **25080**
- Support levels = **24700** and **24630**

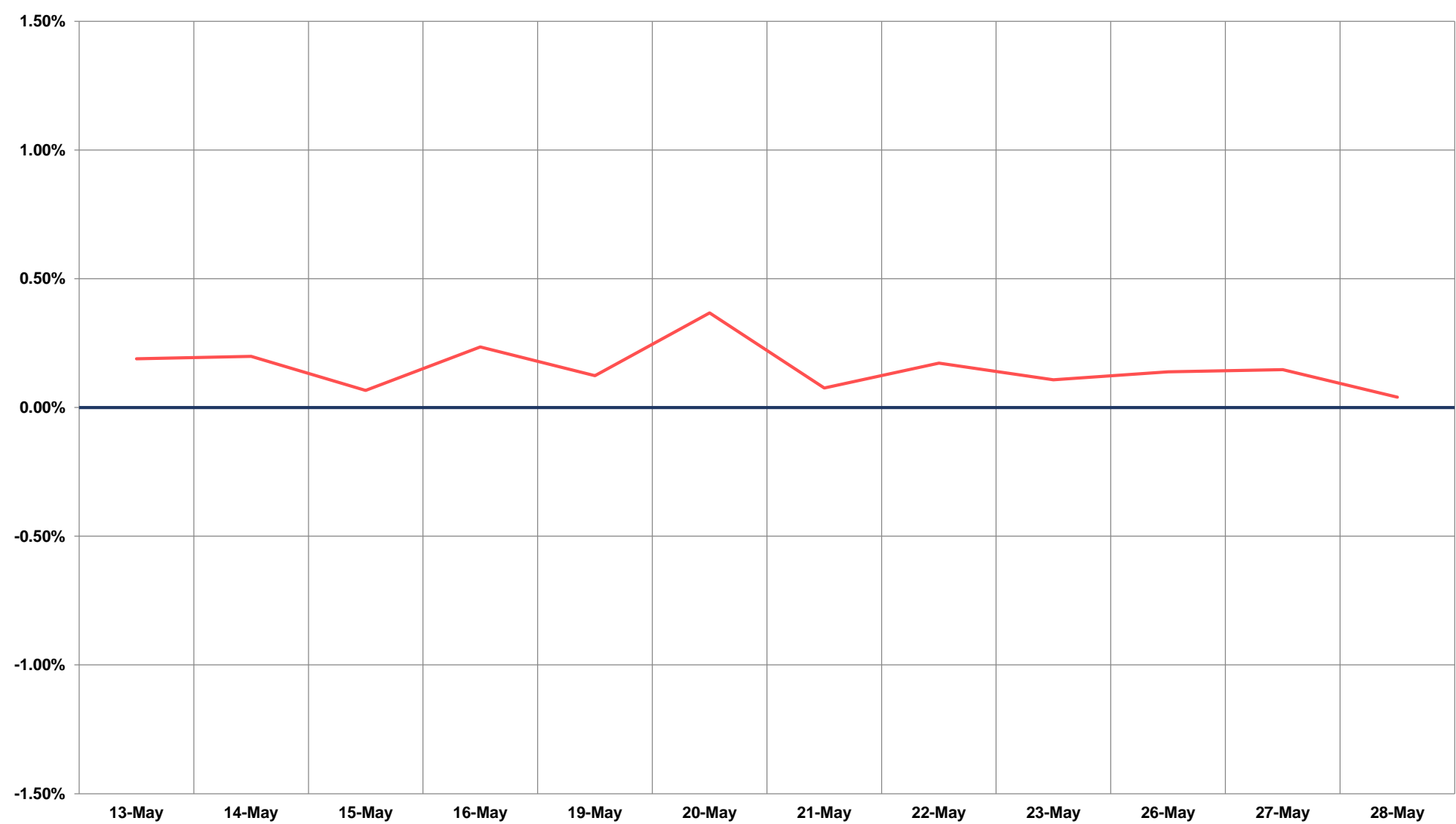
# TECHNICAL VIEWS



## NIFTY FUTURES



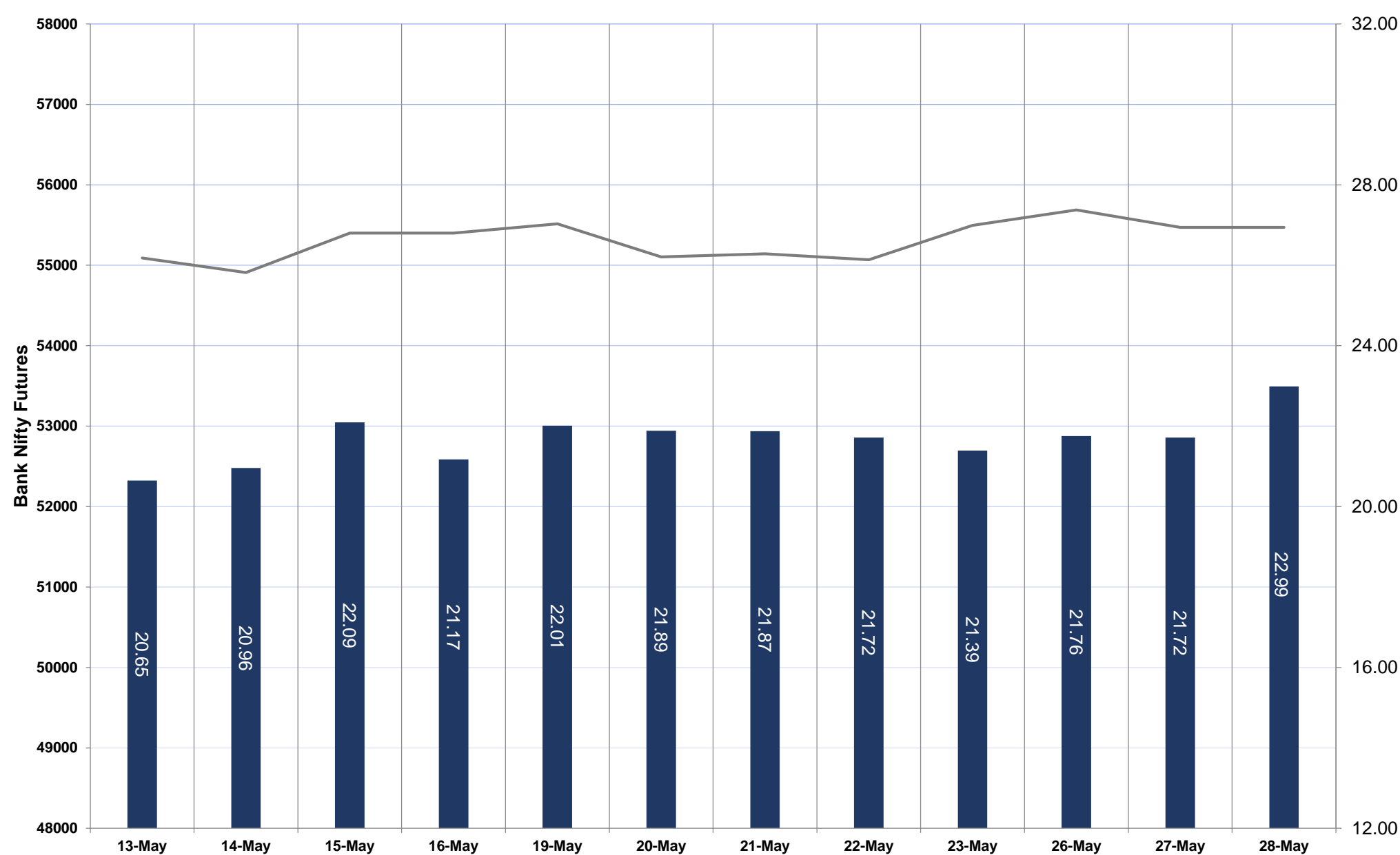
## SPREAD: FUTURE & SPOT



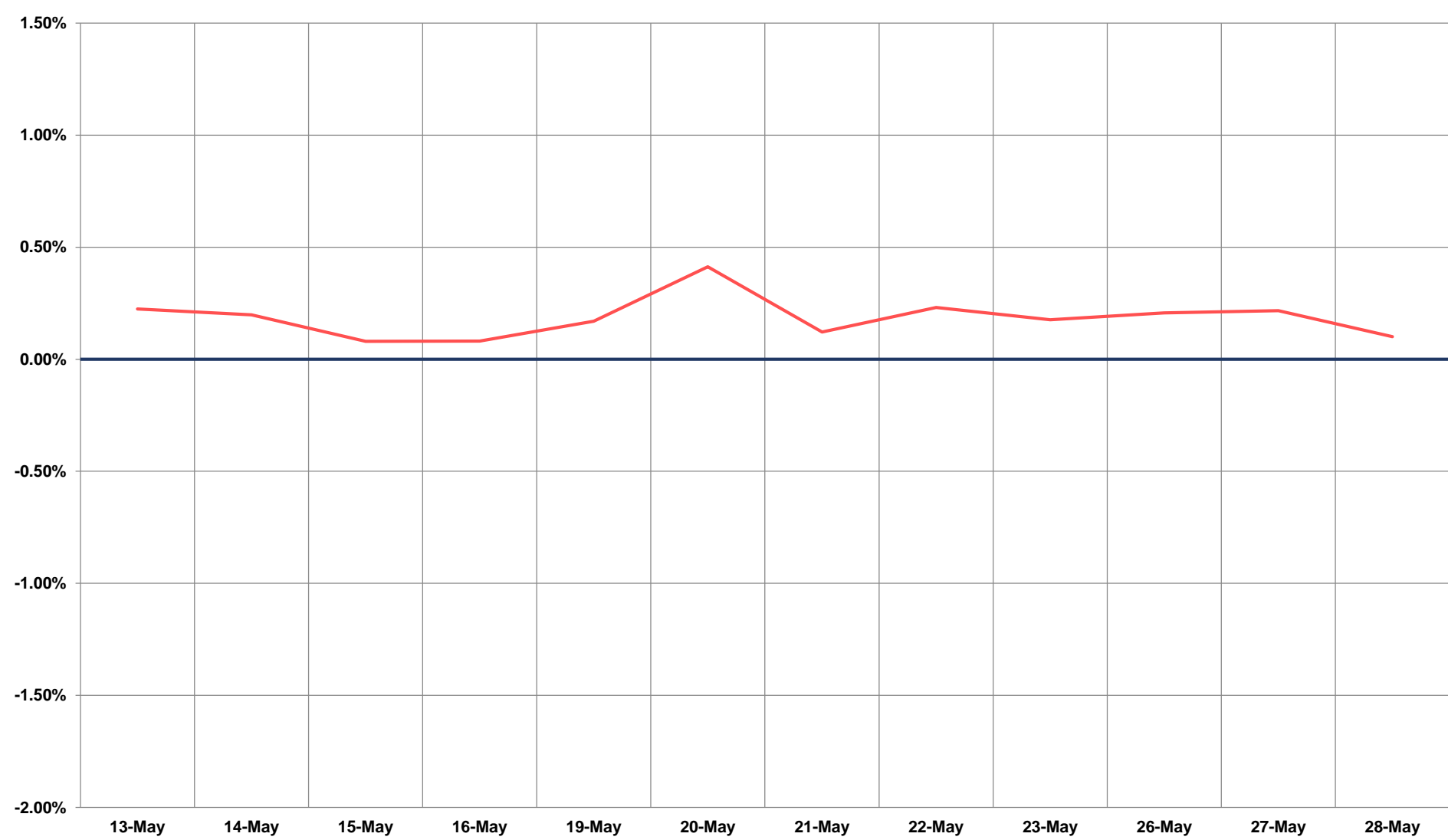
# TECHNICAL VIEWS



## BANK NIFTY FUTURES



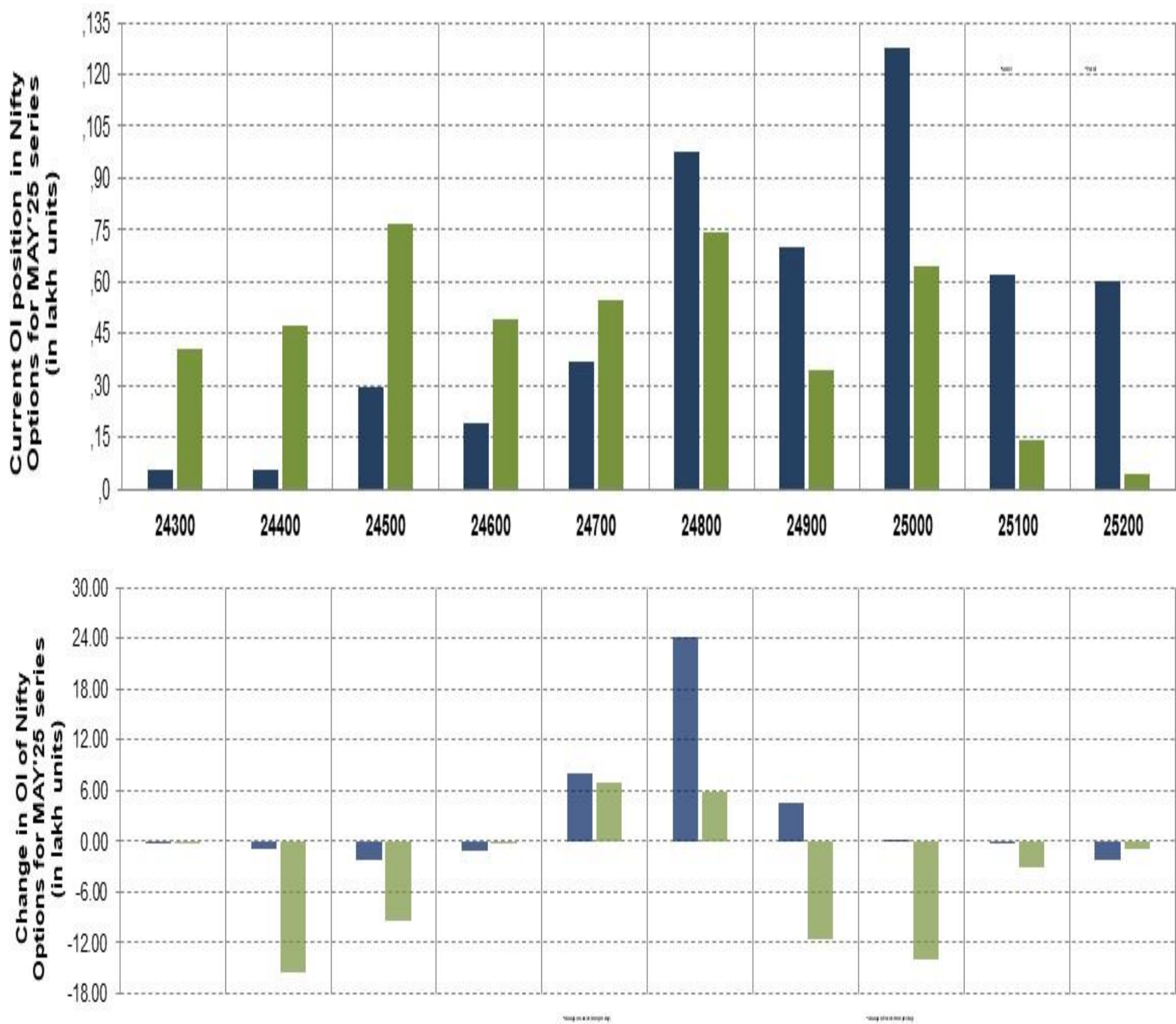
## SPREAD: FUTURE & SPOT







NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 2.40 million in Open Interests is **Strike Price of 24800**
- **Most Active Nifty Put** with an addition of 0.68 millions in Open Interests is **Strike Price of 24700**
- **Maximum Open Interest an outstanding** was 12.77 millions for Calls at **Strike Price of 25000**
- **Maximum Open Interest an outstanding** was 7.70 millions for puts at **Strike Price of 24500**

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