



MORNING MANTRA



Daily Derivatives & Market Report

June 04, 2025



Indian markets snapped three-day losing streak and ended in green on Wednesday as investors went for fundamental strong stocks. After making positive start, markets extended their gains and remained in green till the end of the session as traders got support from positive HSBC Services PMI data. Besides, high-level US delegation will visit India on June 5-6 to advance discussions on the India-US Bilateral Trade Agreement (BTA). The visit comes amid positive progress in ongoing negotiations between the two nations.

Some of the important factors in today's trade:

India's services sector maintains gaining momentum: Investors took support as the seasonally adjusted HSBC India Services PMI Business Activity Index grew to 58.8 in May from 58.7 in April. However, the HSBC India Composite PMI Output Index -- which measures both manufacturing and services -- eased to 59.3 in May as against 59.7 in April.

OECD sees India's economic growth at 6.3% in FY26: The Organisation for Economic Co-operation and Development (OECD) in its latest 'Economic Outlook' has projected India's economic growth at 6.3% in FY2025-26 and 6.4% in FY2026-27. As per the report, India projected to continue to experience strong and broadly stable economic growth.

Foreign fund outflows: Traders overlooked the report that Foreign institutional investors (FIIs) continued their selling on third session on June 3 as they sold equities worth Rs 2,853.83 crore.

Global front: European markets were trading higher ahead of ECB meeting. The European Central Bank (ECB) is widely expected to announce a 25-basis point reduction in its deposit rate, bringing it down to 2.00 percent, before pausing in the July meeting. All Asian equity markets ended higher after data showed the US labour market is holding up despite concerns about risks from President Donald Trump's tariff war.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	80998.25	260.74	0.32
NIFTY	24620.20	77.70	0.32
MIDCAP	45502.84	342.88	0.76
SMLCAP	52868.85	305.41	0.58
BSEFMC	20384.68	28.13	0.14
HEALTHCARE	42673.04	113.44	0.27
AUTO	52333.47	157.67	0.30
POWER	6747.84	21.44	0.32
REALTY	7568.91	-58.97	-0.77
BSE IT	36558.75	124.27	0.34
BANKEX	62704.00	-17.60	-0.03
OIL GAS	26880.63	141.87	0.53
METAL	30659.02	155.24	0.51
INDIA VIX	15.75	-0.81	-4.89

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1837	1116	52
BSE	2071	1933	151

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	9413	11723	(20)
NSE CASH	110840	116212	(5)
NSE F&O	118416	161448	(27)

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	22.14	3.60	1.18
SENSEX	22.66	4.17	1.14

KEY NUMBERS TRACKER



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

FII-DII*	Buy	Sell	Net
DII	13045	10478	2567
FII	16576	15499	1076

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	2305.43	2248.28	57
Index Options	941179.54	960079.62	(18900)
Stock Futures	14418.30	14935.72	(517)
Stock Options	37861.10	42391.88	(4531)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	0.73	0.65
BANK NIFTY	0.81	0.87

DOLLAR INDEX

Dollar Index	Current	Previous	% Change
DXY	99.22	99.25	-0.03

10-YEARS G-SEC YIELD

Country	Current	Previous	% Change
INDIA	6.211	6.206	0.08
USA	4.385	4.462	-1.75

KEY COMMODITIES TRACKER (in \$)

Commodity	Current	Change Points	% Change
Gold	3356.94	-2.72	-0.08
Silver	34.46	-0.11	-0.34
Crude-Oil	63.38	-0.03	-0.05
Brent-Crude	65.63	-0.01	-0.02

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES

Expiry	Close	Change Points	% Change
26 JUNE-25 USD-INR	85.98	0.24	0.28
26 JUNE-25 EUR-INR	98.02	0.18	0.19
26 JUNE-25 GBP-INR	116.20	0.48	0.41
26 JUNE-25 JPY- INR	59.83	-0.32	-0.53

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS

Index	Close	S2	S1	Pivot	R1	R2
NIFTY	24620	24485	24552	24598	24666	24712
SENSEX	80998	80548	80773	80930	81155	81312
NIFTY FUTURES	24729	24586	24658	24709	24781	24833
BANK NIFTY	55677	55243	55460	55625	55842	56008
CNX IT	36938	36604	36771	36930	37097	37256
CNX MIDCAP	57925	57032	57478	57725	58171	58417
CNX SMALLCAP	18257	17946	18102	18186	18341	18426
INDIA VIX	15.74	14.71	15.23	16.14	16.66	17.57

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

SECURITIES BAN IN F&O TRADES FOR 04-06-2025

ABFRL, MANAPPURAM

TECHNICAL VIEWS



NIFTY

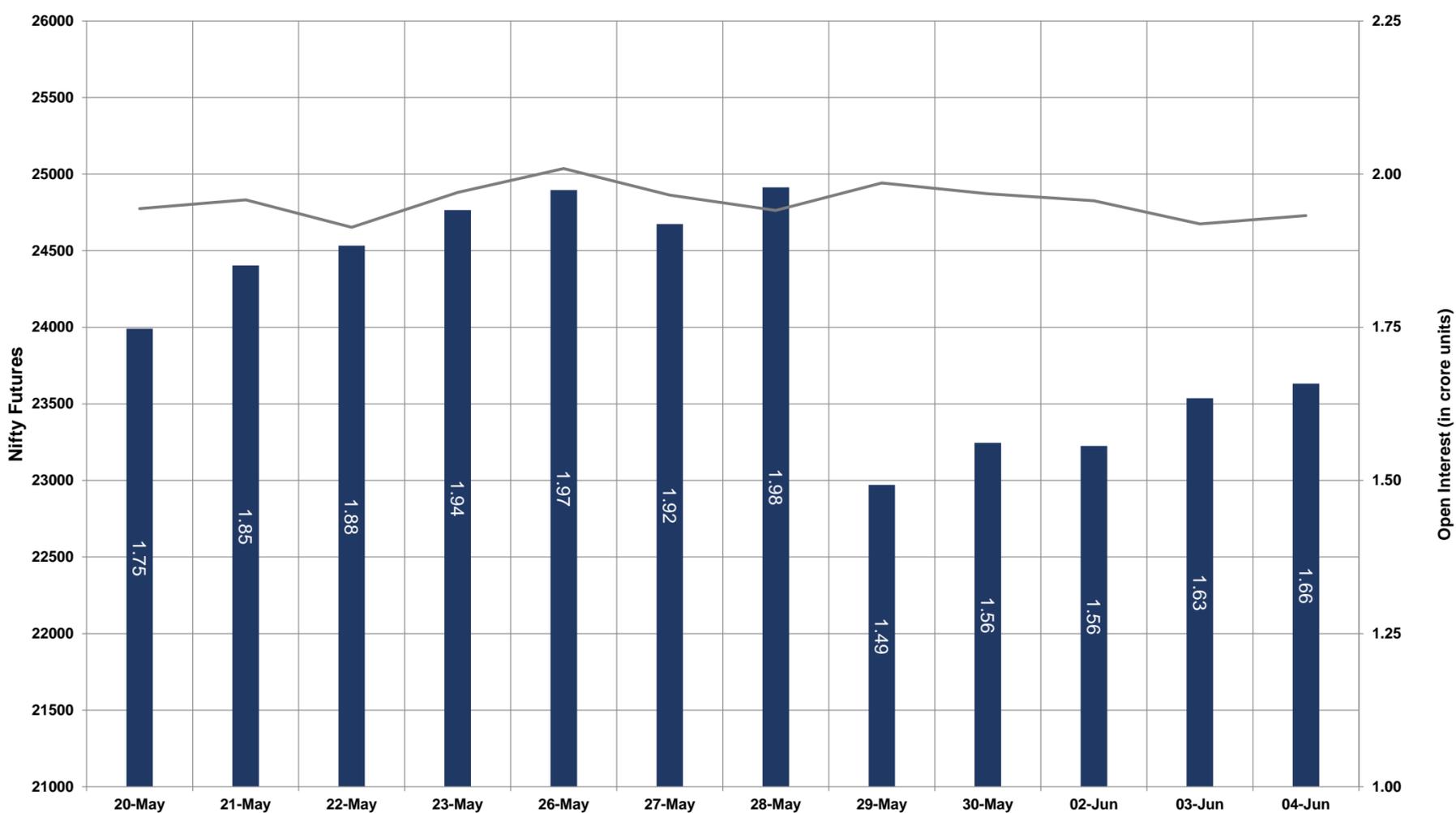


- Nifty Cash = **24620.20 (0.32%)**
- Resistance levels = **24800** and **24950**
- Support levels = **24420** and **24350**

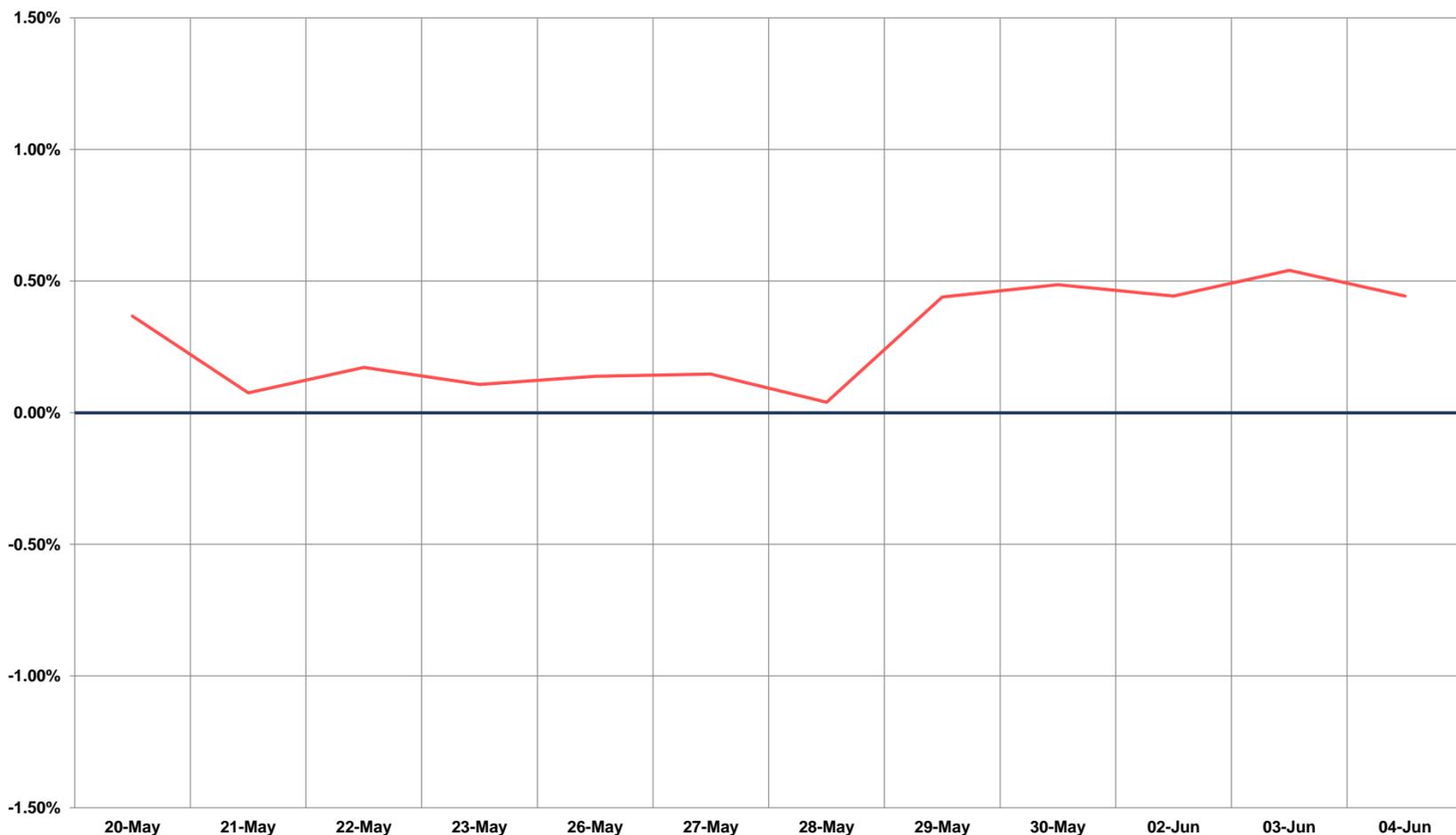
TECHNICAL VIEWS



NIFTY FUTURES



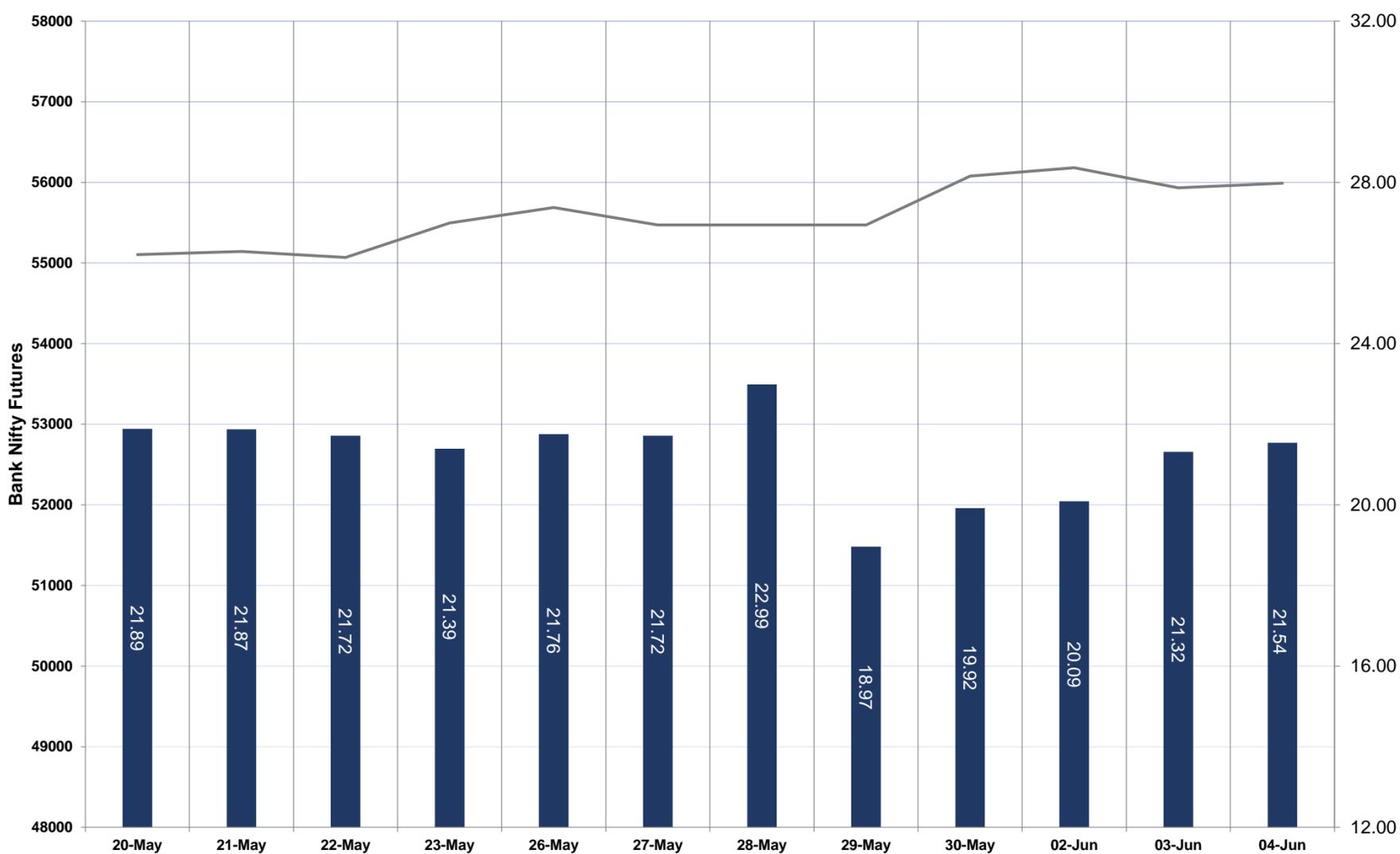
SPREAD: FUTURE & SPOT



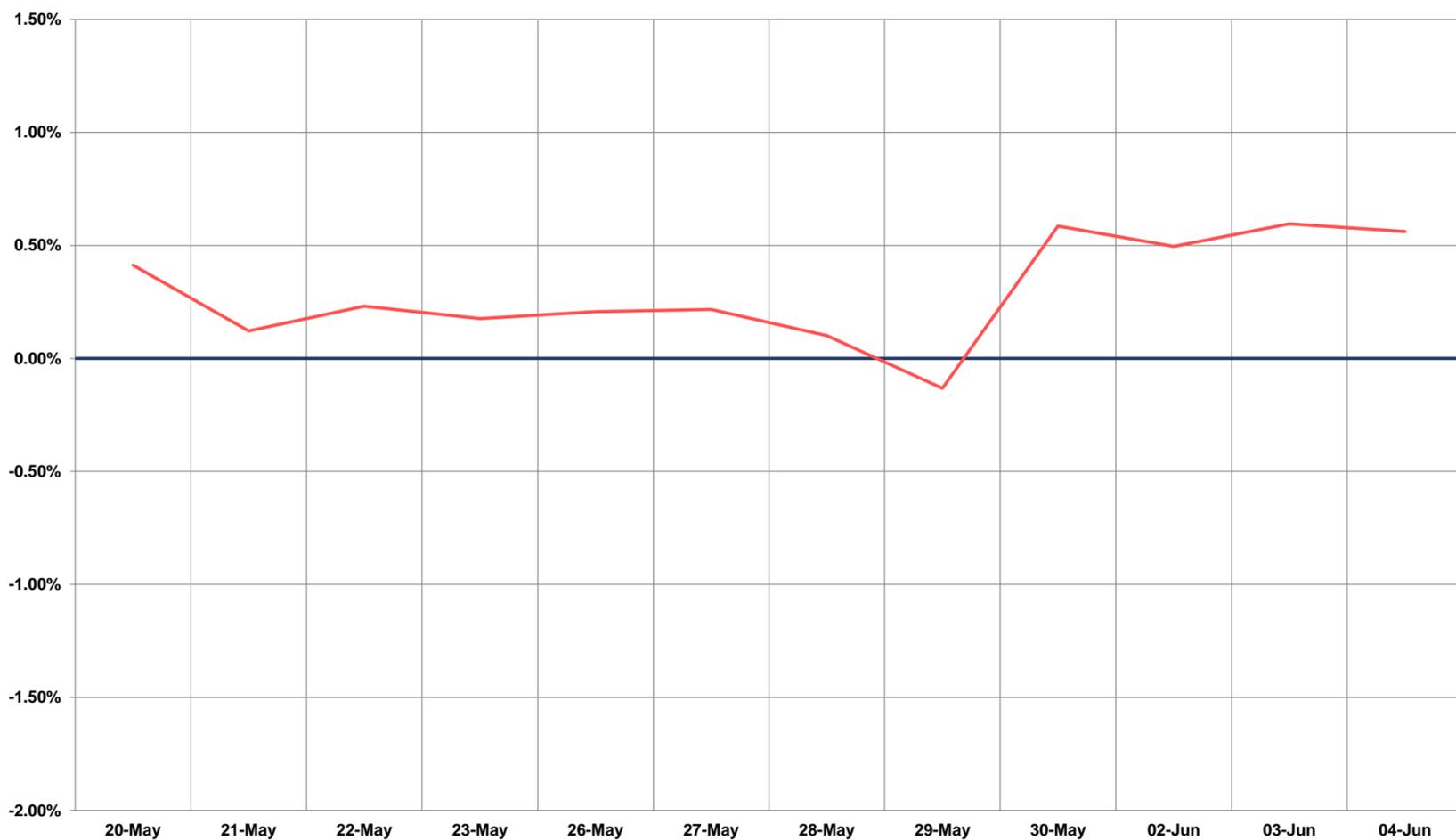
TECHNICAL VIEWS



BANK NIFTY FUTURES



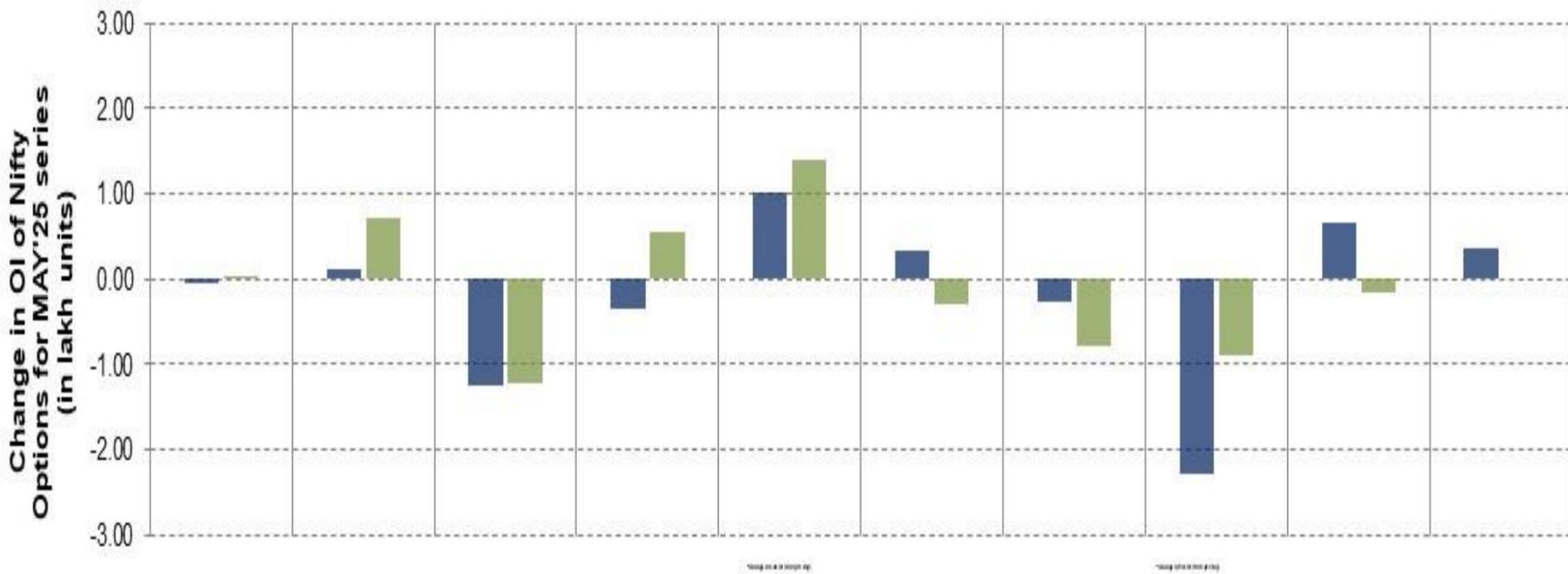
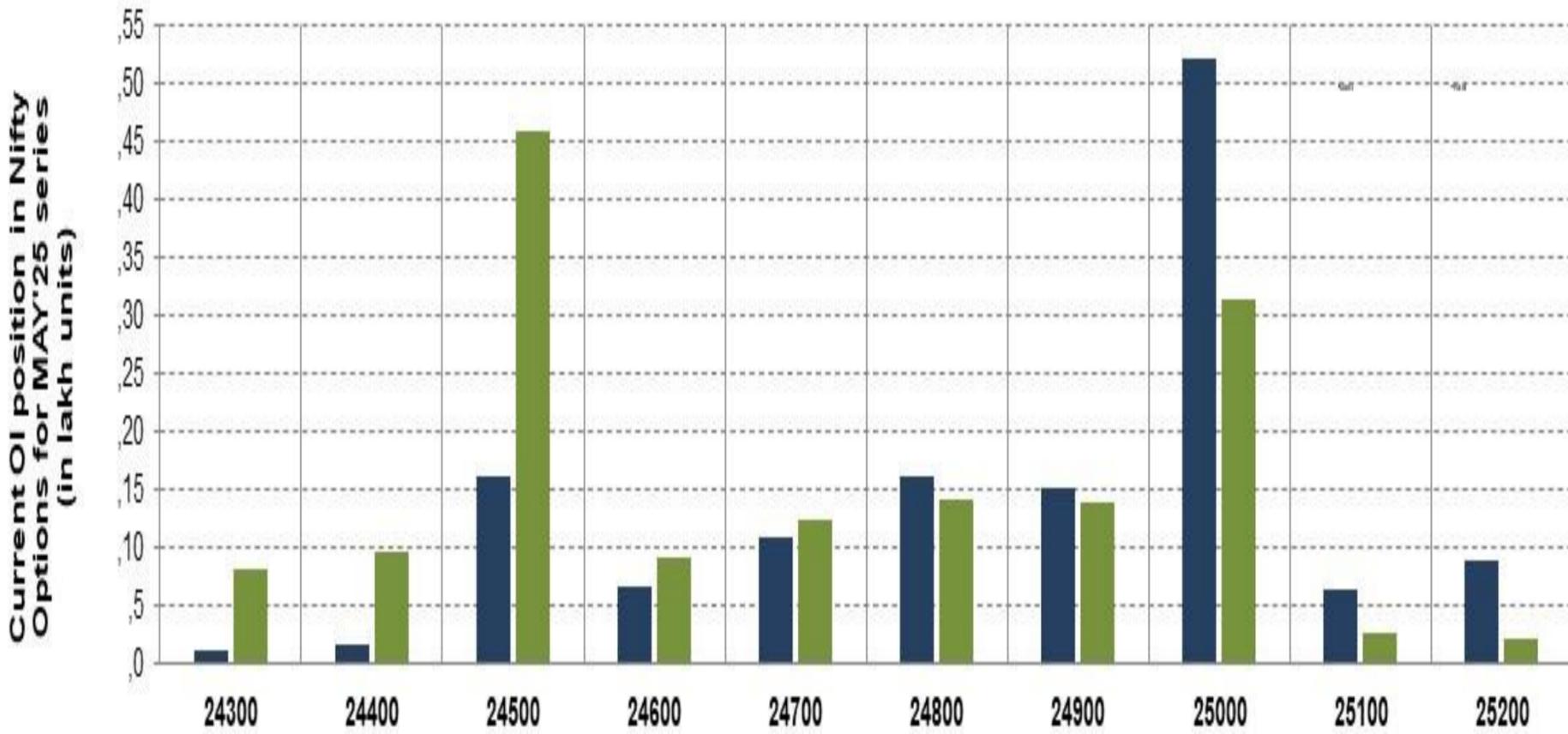
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.10 million in Open Interests is **Strike Price of 24700**
- **Most Active Nifty Put** with an addition of 0.14 millions in Open Interests is **Strike Price of 24700**
- **Maximum Open Interest an outstanding** was 5.20 millions for Calls at **Strike Price of 25000**
- **Maximum Open Interest an outstanding** was 4.58 millions for puts at **Strike Price of 24500**

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