



MORNING MANTRA



Daily Derivatives & Market Report

APR 04, 2025



Mirroring weak global cues, Indian equity benchmarks continued to show their downward trend on Friday amid global recession worries. US President Donald Trump's announcement on tariffs sparked the global trade war fears. After making negative start, indices spent their entire day under selling pressure as traders avoided to take risk.

Some of the important factors in trade:

India's services sector activity eases slightly in March: traders were cautious as India's services sector activity eased slightly in March 2025, weighed down by a marginal slowdown in sales amid softer demand conditions and easing inflationary pressures. According to the survey report, the seasonally adjusted HSBC India Services PMI Business Activity Index fell from February's reading of 59.0 to 58.5 in March, but remained above its long-run average of 54.2.

Sustained foreign fund outflows: Traders were worried as exchange data showed foreign institutional investors (FIIs) extended their selling streak for the fourth consecutive session on April 3, offloading equities worth Rs 2,806 crore.

India's passenger vehicle exports unlikely to face Trump tariff's heat: Traders overlooked the report that ICRA has stated that the US administration's latest tariff measures will not have any material impact on India's passenger vehicle exports due to meagre volumes of such shipments.

Global front: European markets were trading lower as investors reacted to mixed economic readings from Germany and France. Asian markets ended lower as traders continued to assess the impact of the steeper-than-expected reciprocal tariffs imposed by US President Donald Trump on U.S. trade partners.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	75364.69	-930.67	-1.22
NIFTY	22904.45	-345.65	-1.49
MIDCAP	40508.53	-1287.55	-3.08
SMLCAP	45867.17	-1626.94	-3.43
BSEFMC	19514.63	-50.13	-0.26
HEALTHCARE	40531.58	-1339.21	-3.20
AUTO	46126.83	-1285.33	-2.71
POWER	6466.66	-193.27	-2.90
REALTY	6378.62	-238.80	-3.61
BSE IT	33075.58	-1218.01	-3.55
BANKEX	59156.10	-46.30	-0.08
OIL GAS	24231.47	-980.51	-3.89
METAL	28450.44	-1925.11	-6.34
INDIA VIX	13.76	0.16	1.18

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	733	2196	41
BSE	1129	2815	132

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	5670	5238	8
NSE CASH	103513	90489	14
NSE F&O	198702	151488	31

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	20.82	3.39	1.35
SENSEX	21.00	3.88	1.21

KEY NUMBERS TRACKER



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

FII-DII*	Buy	Sell	Net
DII	14454	16175	(1720)
FII	13947	17431	(3484)

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	4054.62	6330.77	(2276)
Index Options	1150634.90	1119531.87	31103
Stock Futures	25719.84	29483.61	(3764)
Stock Options	83820.01	87788.09	(3968)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	0.74	1.15
BANK NIFTY	0.97	1.02

DOLLAR INDEX

Dollar Index	Current	Previous	% Change
DXY	102.49	101.93	0.56

10-YEARS G-SEC YIELD

Country	Current	Previous	% Change
INDIA	6.464	6.499	-0.54
USA	3.905	4.055	-3.65

KEY COMMODITIES TRACKER (in \$)

Commodity	Current	Change Points	% Change
Gold	3028.81	-84.13	-2.70
Silver	29.74	-2.15	-6.77
Crude-Oil	61.76	-5.19	-7.75
Brent-Crude	65.33	-4.81	-6.89

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES

Expiry	Close	Change Points	% Change
28 APR-25 USD-INR	85.53	-0.08	-0.09
28 APR-25 EUR-INR	94.69	-0.04	-0.04
28 APR-25 GBP-INR	111.35	-1.21	-1.07
28 APR-25 JPY- INR	59.06	0.36	0.61

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS

Index	Close	S2	S1	Pivot	R1	R2
NIFTY	22904	22635	22770	22992	23127	23349
SENSEX	75365	74604	74984	75621	76002	76639
NIFTY FUTURES	22958	22713	22835	23043	23165	23373
BANK NIFTY	51503	51052	51278	51586	51811	52119
CNX IT	33511	32821	33166	33764	34109	34707
CNX MIDCAP	50646	49308	49977	51019	51687	52729
CNX SMALLCAP	15676	15136	15406	15829	16099	16523
INDIA VIX	13.76	12.95	13.36	13.80	14.21	14.65

INDEX TREND ANALYSIS

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

SECURITIES BAN IN F&O TRADES FOR 07-04-2025

BSOFT, HINDCOPPER

TECHNICAL VIEWS



NIFTY

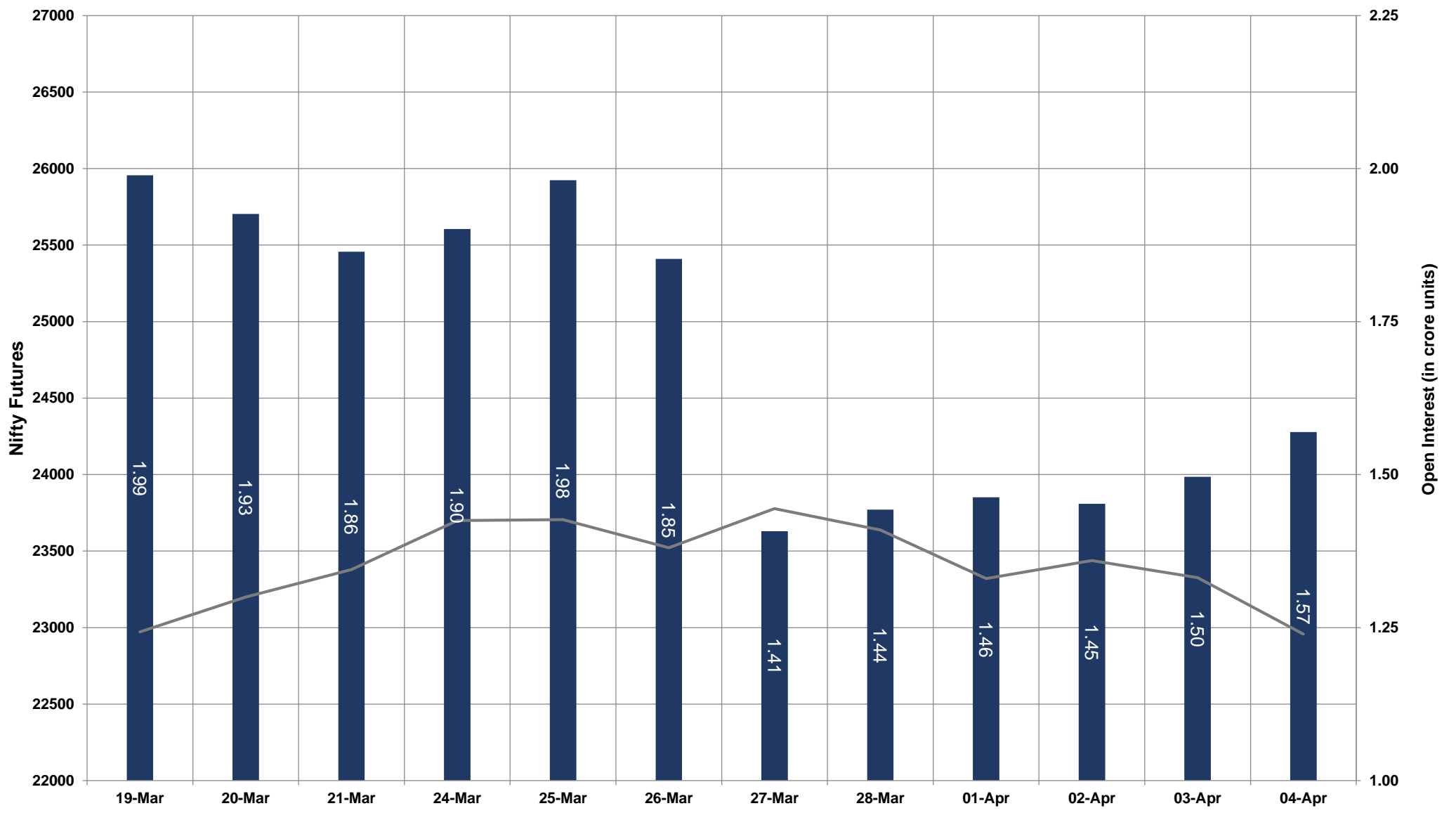


- Nifty Cash = **22904.45 (-1.49%)**
- Resistance levels = **23050** and **23200**
- Support levels = **22850** and **22600**

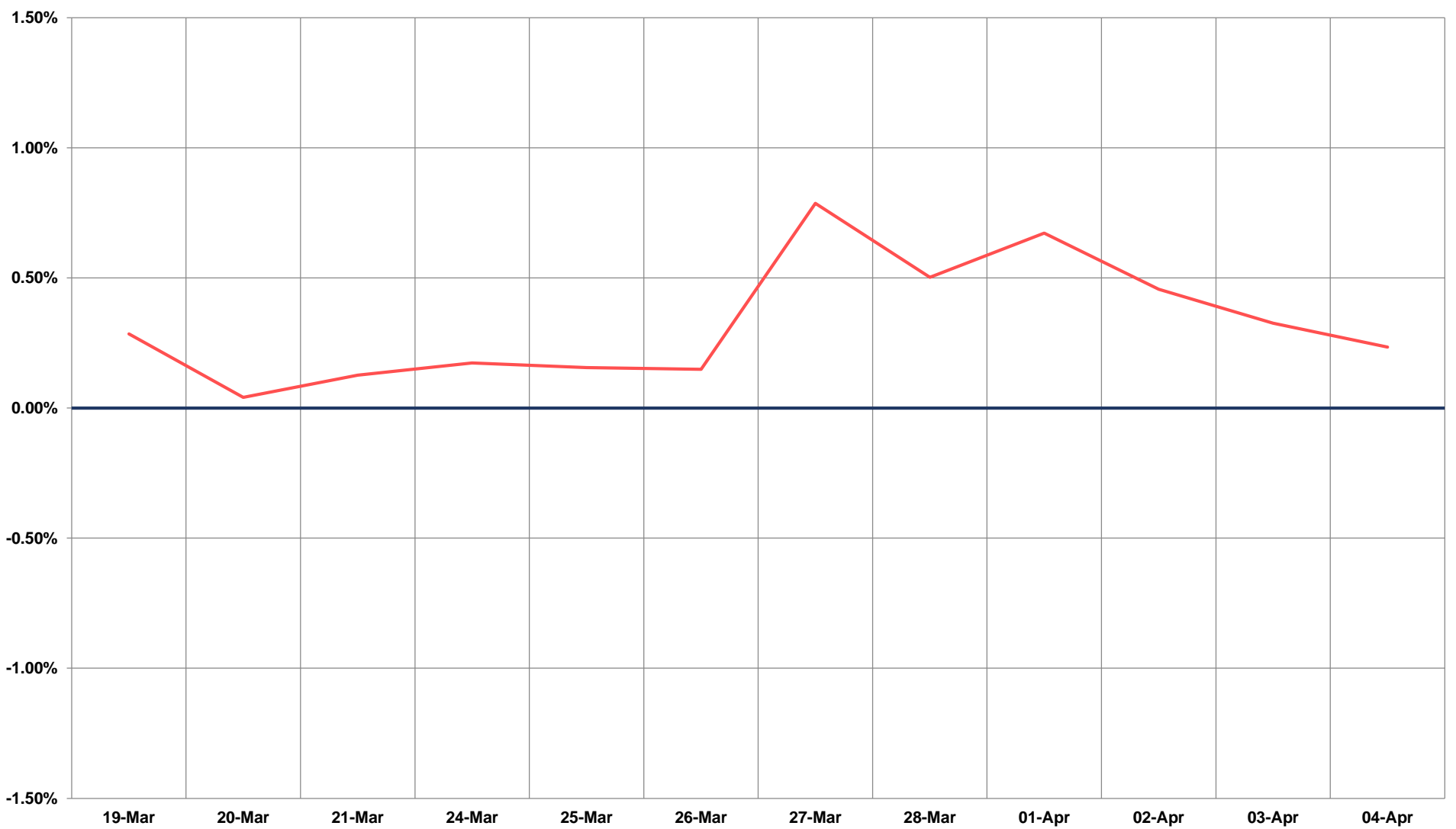
TECHNICAL VIEWS



NIFTY FUTURES



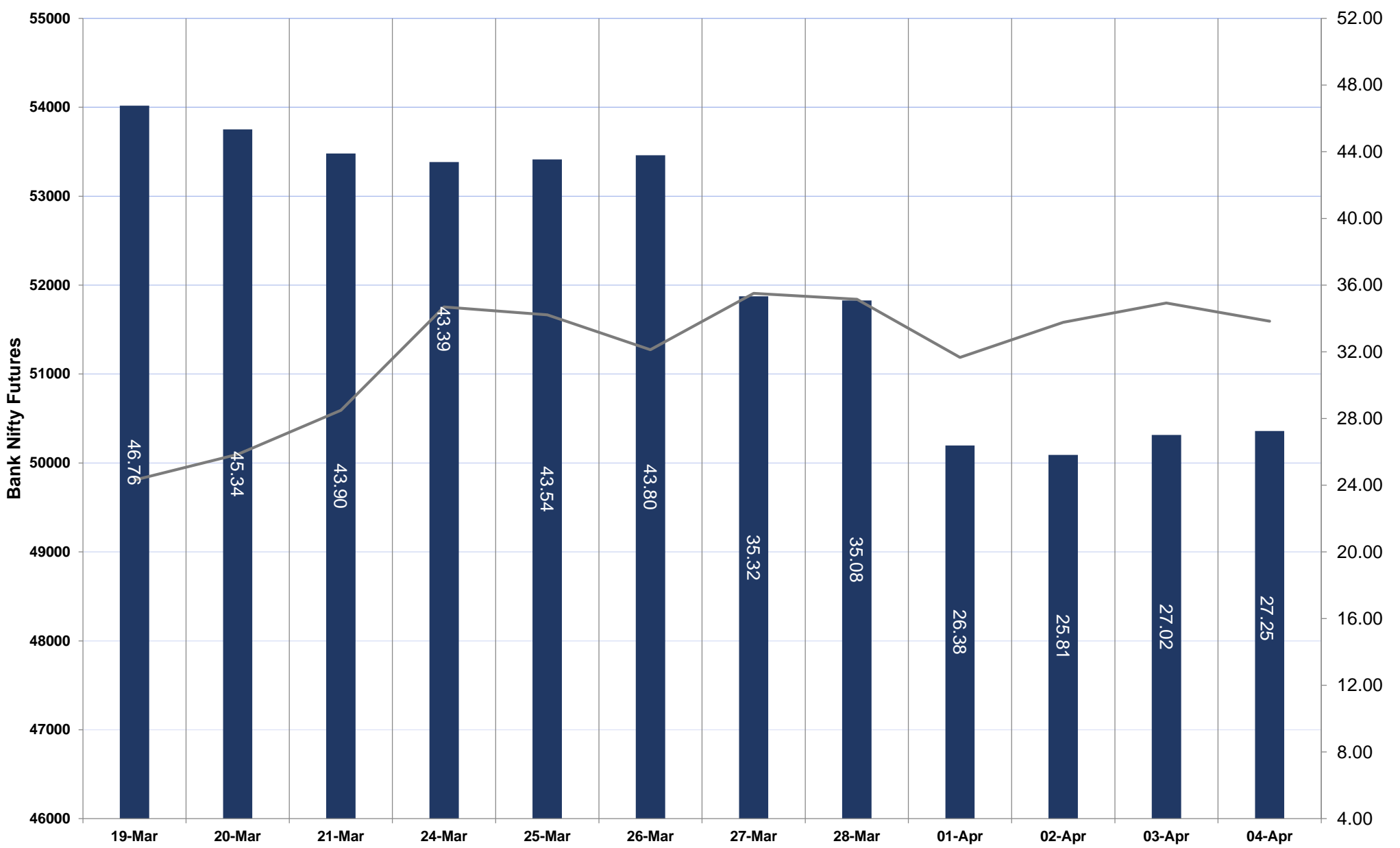
SPREAD: FUTURE & SPOT



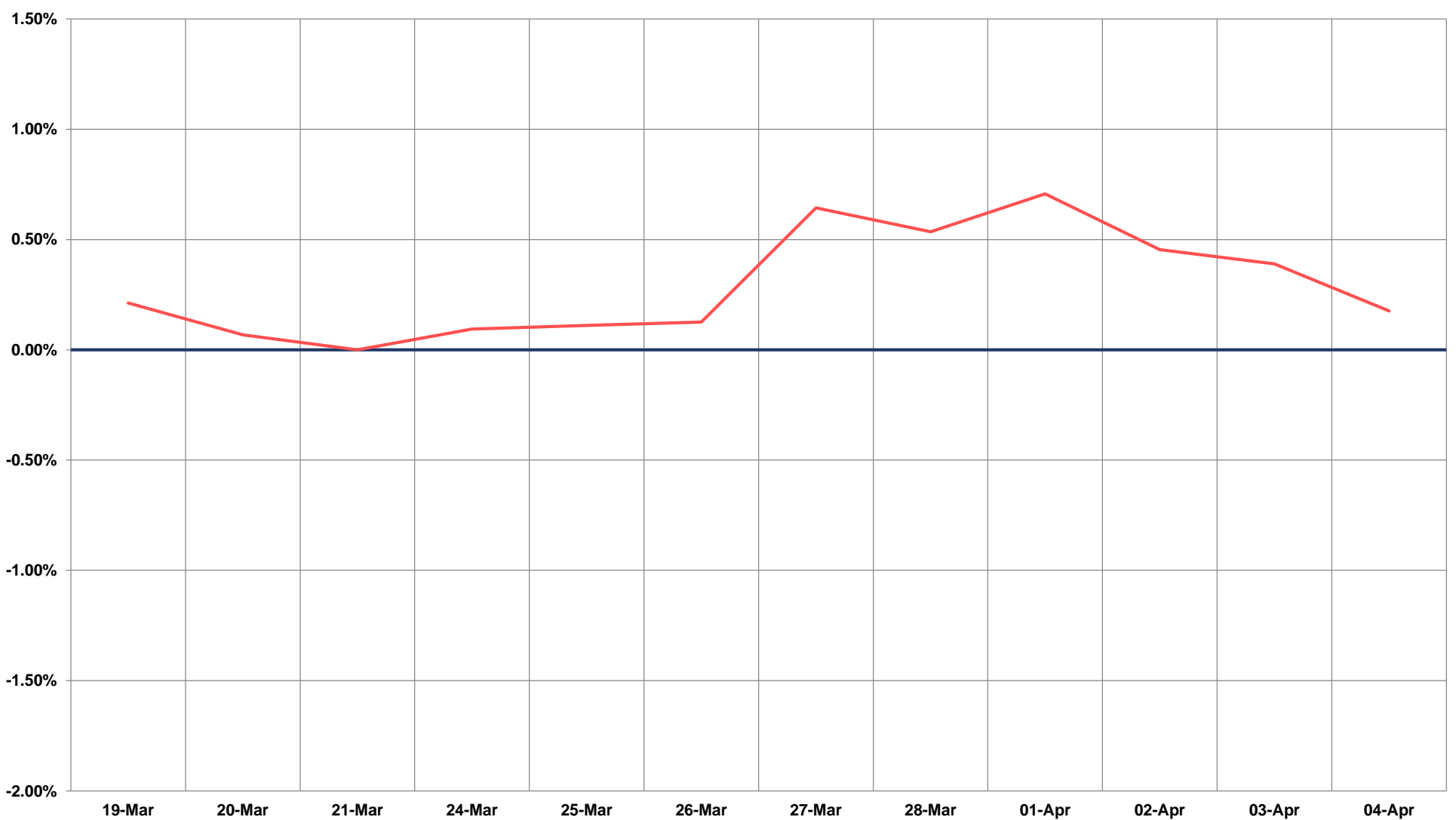
TECHNICAL VIEWS



BANK NIFTY FUTURES



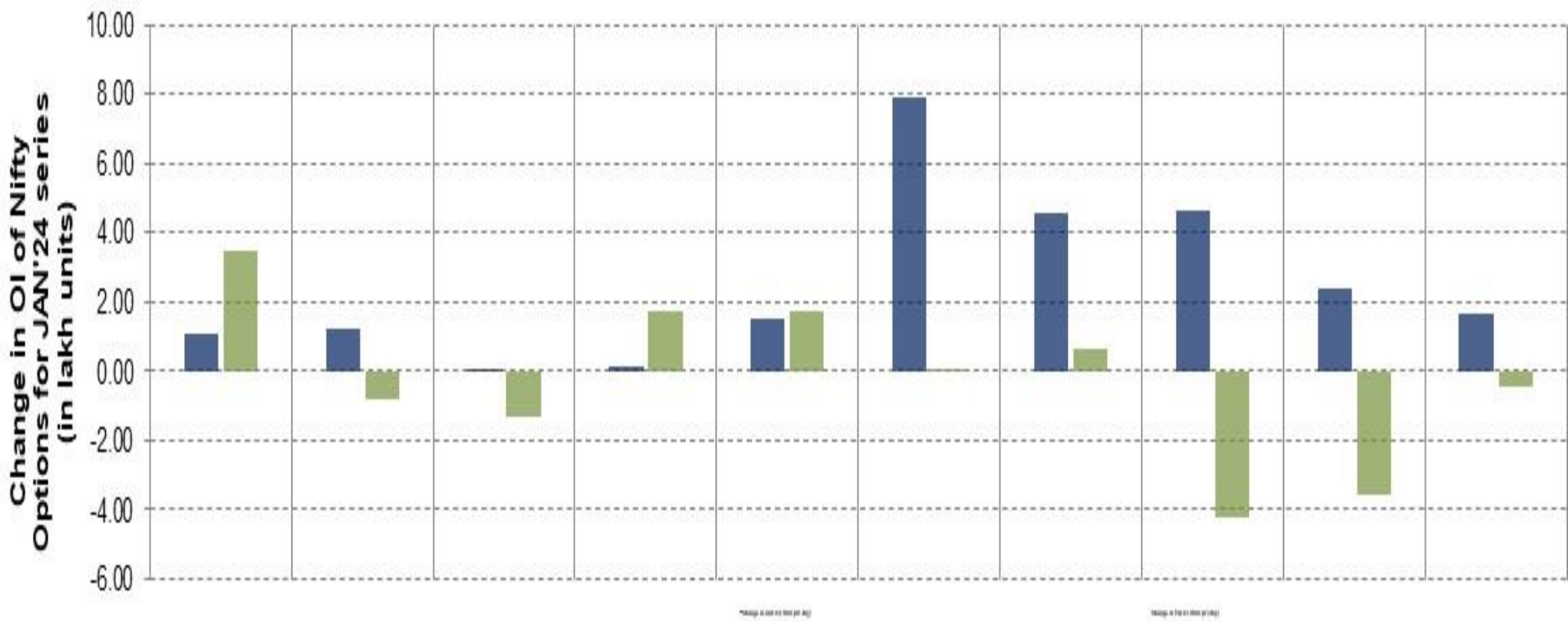
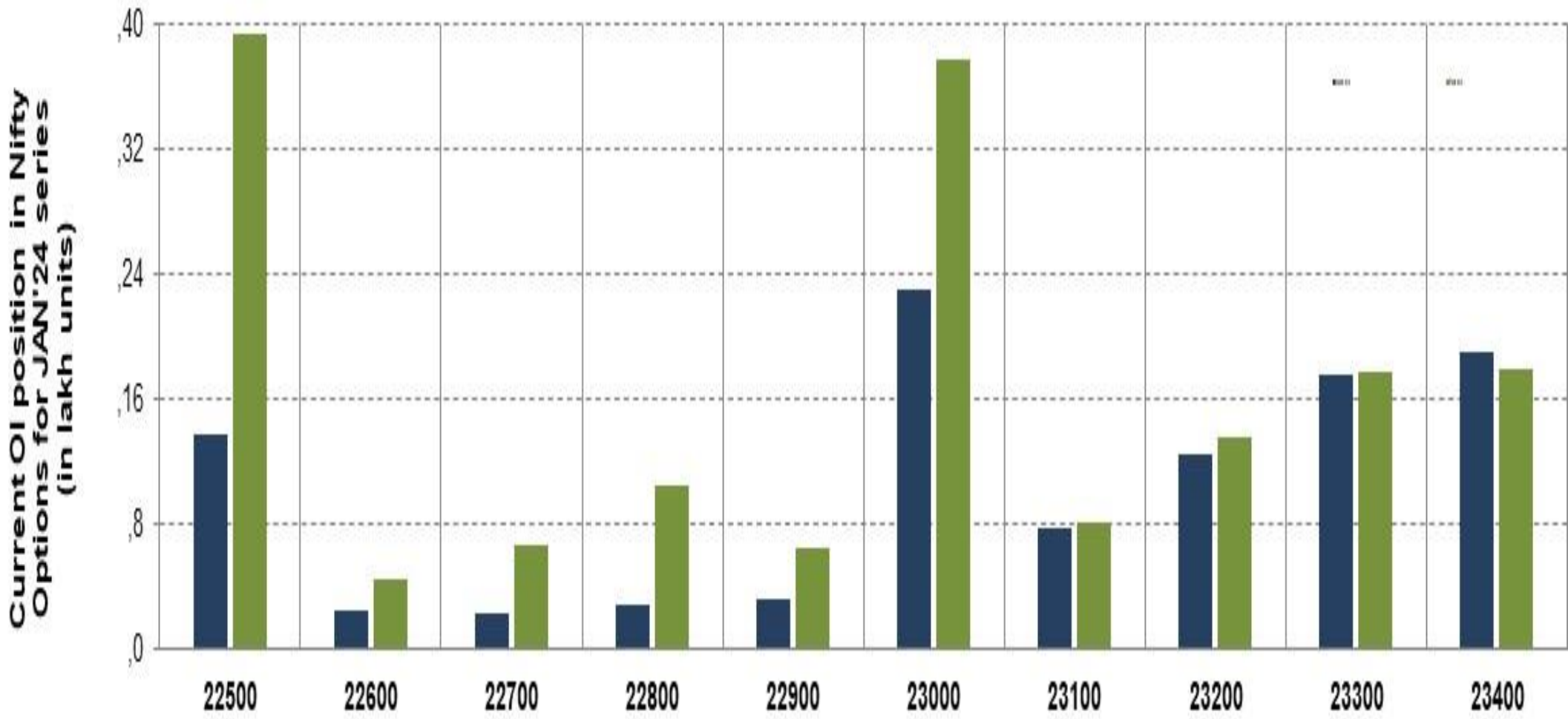
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.79 million in Open Interests is **Strike Price of 23000**
- **Most Active Nifty Put** with an addition of 0.34 millions in Open Interests is **Strike Price of 22500**
- **Maximum Open Interest** an outstanding was 2.28 millions for Calls at **Strike Price of 23000**
- **Maximum Open Interest** an outstanding was 3.92 millions for puts at **Strike Price of 22500**

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