



MORNING MANTRA



Daily Derivatives & Market Report

APR 07, 2025



Local equity markets witnessed bloodbath on Monday, with both the Nifty and Sensex slipping deep into the red as fears over a global trade war sparked by U.S. President Donald Trump's tariffs fueled a risk-off mood. Indices made sharp gap-down opening and remained under pressure throughout the session, trading deep in negative territory. All sectors were in the red, with IT, metals, and banks among the worst hit.

Some of the important factors in trade:

FII offload Rs 3,484 crore in equities: Traders were cautious as exchange data showed foreign institutional investors (FIIs) offloaded equities worth Rs 3,483.98 crore on a net basis on Friday.

US tariffs could lead to increased dumping in India: Sentiments remained weak as CareEdge Ratings in a report said the imposition of high reciprocal tariffs by the US on other competing nations raises the possibility of increased dumping by those nations in India, as well as in other export markets, which could negatively impact certain sectors.

India's exports projected to cross \$800 billion in 2024-25: Traders overlooked India's forex reserves rise to \$665.4 billion: Reserve Bank of India stating that India's foreign exchange reserves rose from \$6.596 billion to \$665.396 billion in the week that ended on March 28, extending gains for the fourth straight week.

Global front: European markets were trading in the red after reports suggested the European Union is gearing up to impose retaliatory tariffs on the United States. Asian markets ended in red amid ongoing concerns about a global trade war after China announced retaliatory tariffs on U.S. goods in reaction to U.S. President Donald Trump's new levies that could fuel inflation and damage the global economy.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	73137.90	-2226.79	-2.95
NIFTY	22161.60	-742.85	-3.24
MIDCAP	39107.96	-1400.57	-3.46
SMLCAP	43974.36	-1892.81	-4.13
BSEFMC	19262.44	-252.19	-1.29
HEALTHCARE	39280.31	-1251.27	-3.09
AUTO	44388.57	-1738.26	-3.77
POWER	6331.52	-135.14	-2.09
REALTY	6015.56	-363.06	-5.69
BSE IT	32110.12	-965.46	-2.92
BANKEX	57160.07	-1996.03	-3.37
OIL GAS	23549.59	-681.88	-2.81
METAL	26680.16	-1770.28	-6.22
INDIA VIX	22.79	9.03	65.63

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	531	2527	17
BSE	570	3515	140

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	8462	5670	49
NSE CASH	124335	103513	20
NSE F&O	310384	198702	56

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	20.14	3.28	1.40
SENSEX	20.38	3.76	1.25

KEY NUMBERS TRACKER



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

FII-DII*	Buy	Sell	Net
DII	26528	14406	12122
FII	13372	22412	(9040)

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	9114.28	12449.15	(3335)
Index Options	1285828.94	1271195.72	14633
Stock Futures	30340.05	28479.18	1861
Stock Options	99955.37	93772.43	6183

PUT-CALL RATIO

Index	Current	Previous
NIFTY	0.74	0.74
BANK NIFTY	0.82	0.97

DOLLAR INDEX

Dollar Index	Current	Previous	% Change
DXY	102.85	102.61	0.23

10-YEARS G-SEC YIELD

Country	Current	Previous	% Change
INDIA	6.486	6.467	0.29
USA	3.981	3.991	-0.25

KEY COMMODITIES TRACKER (in \$)

Commodity	Current	Change Points	% Change
Gold	3034.50	-5.91	-0.20
Silver	30.32	0.83	2.82
Crude-Oil	60.33	-1.65	-2.66
Brent-Crude	63.93	-1.65	-2.50

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES

Expiry	Close	Change Points	% Change
28 APR-25 USD-INR	85.99	0.48	0.56
28 APR-25 EUR-INR	94.15	-0.38	-0.42
28 APR-25 GBP-INR	110.25	-1.02	-0.91
28 APR-25 JPY- INR	58.88	-0.13	-0.23

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS

Index	Close	S2	S1	Pivot	R1	R2
NIFTY	22162	21543	21852	22053	22363	22563
SENSEX	73138	70677	71907	72656	73886	74635
NIFTY FUTURES	22264	21670	21967	22157	22454	22644
BANK NIFTY	49860	48545	49203	49814	50472	51084
CNX IT	32669	30225	31447	32141	33363	34057
CNX MIDCAP	48809	46176	47493	48283	49600	50390
CNX SMALLCAP	15068	13692	14380	14772	15460	15852
INDIA VIX	22.79	10.48	16.64	19.91	26.07	29.34

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	Buy	NEUTRAL	SELL

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

BSOFT, HINDCOPPER, MANAPPURAM

TECHNICAL VIEWS



NIFTY

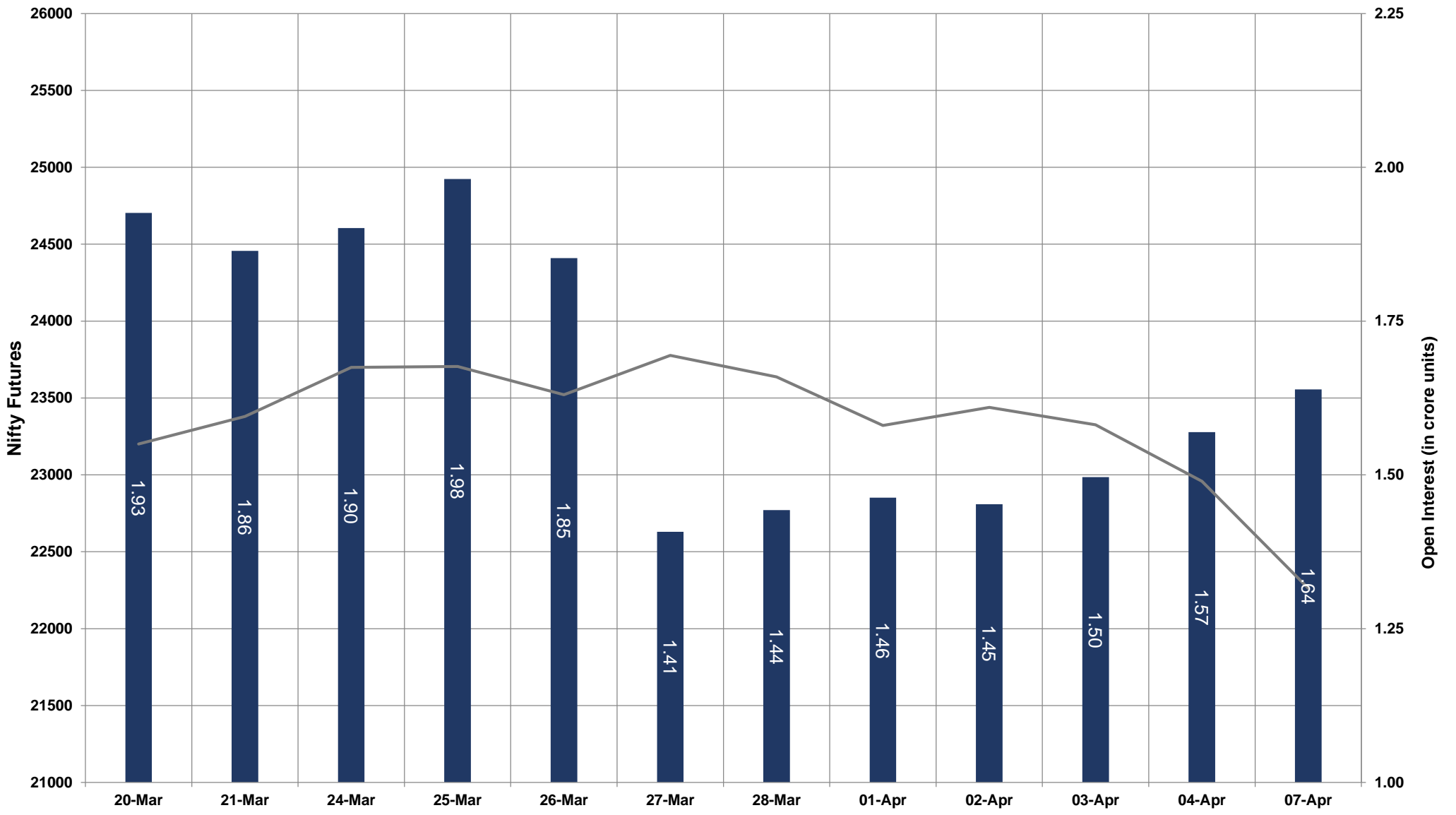


- Nifty Cash = **22161.60 (-3.24%)**
- Resistance levels = **22250** and **22450**
- Support levels = **21950** and **21800**

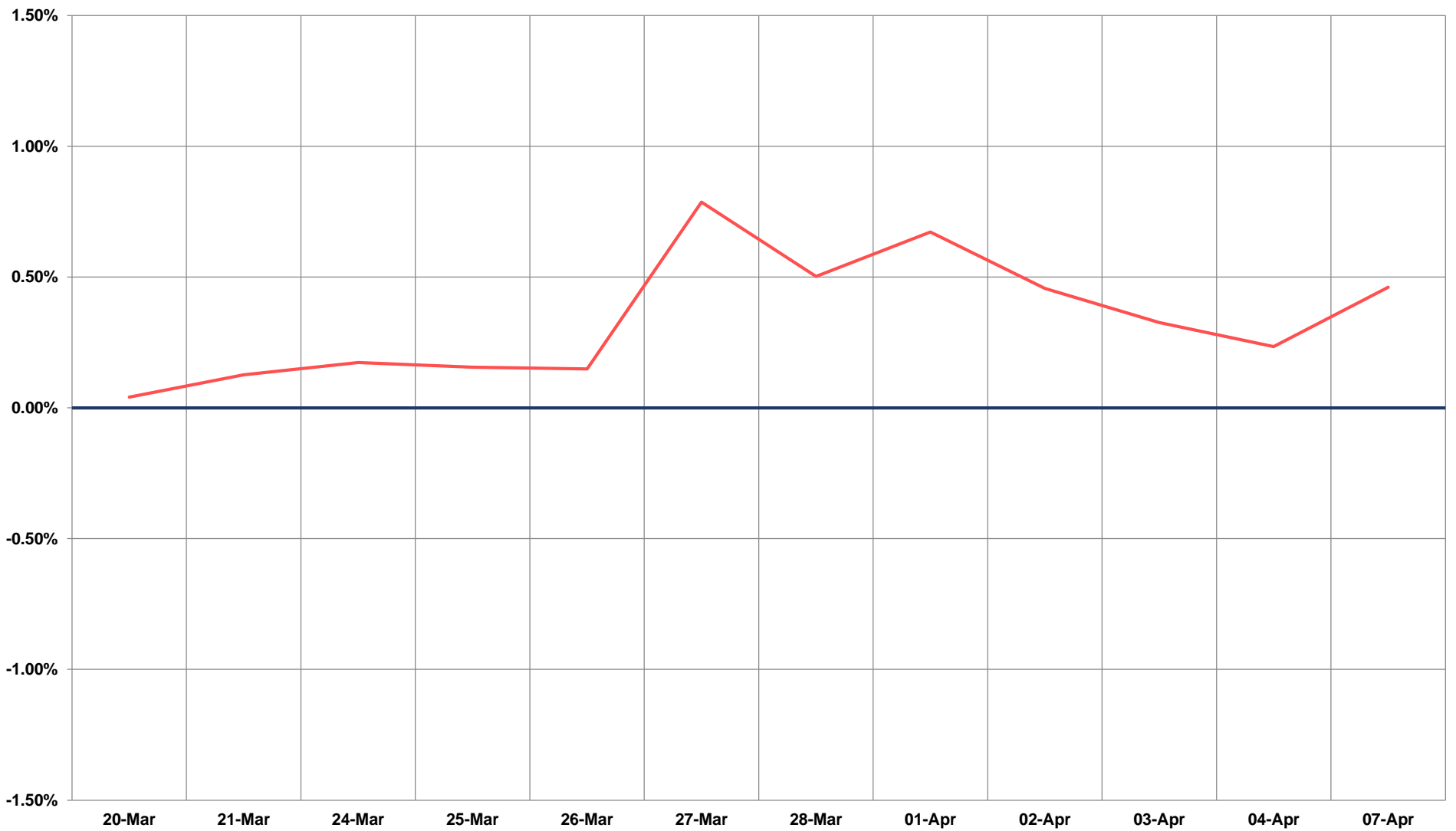
TECHNICAL VIEWS



NIFTY FUTURES



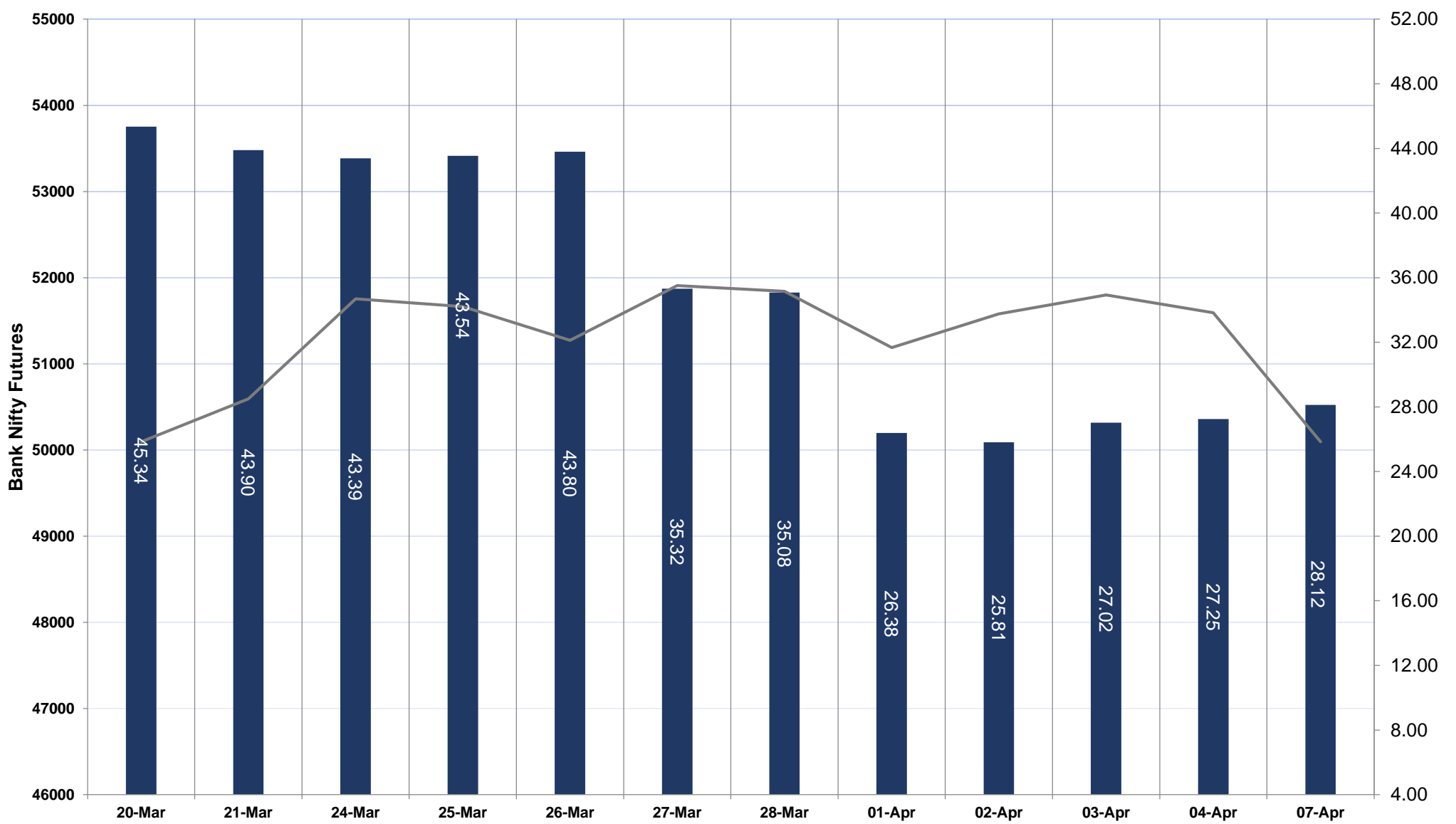
SPREAD: FUTURE & SPOT



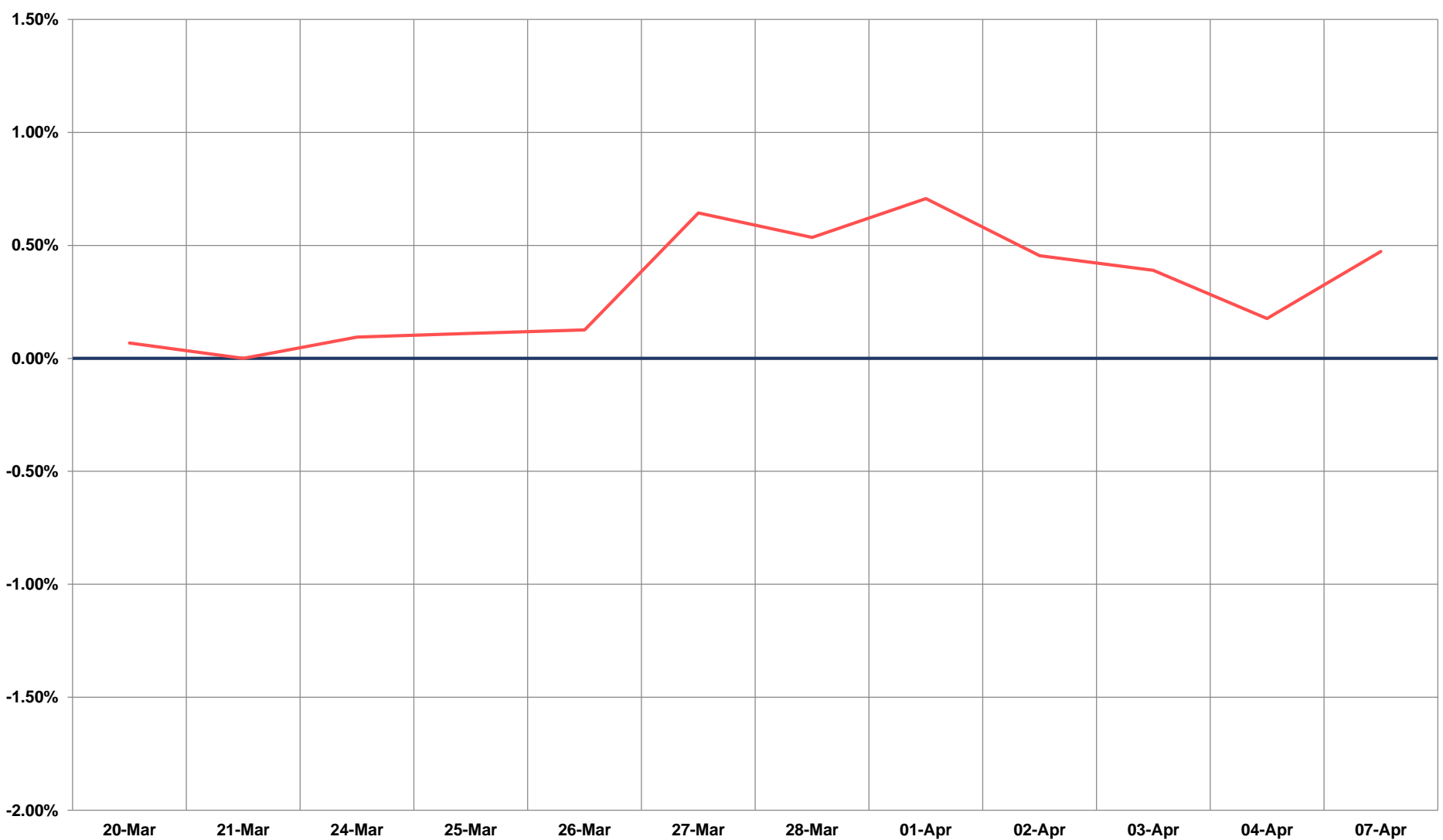
TECHNICAL VIEWS



BANK NIFTY FUTURES



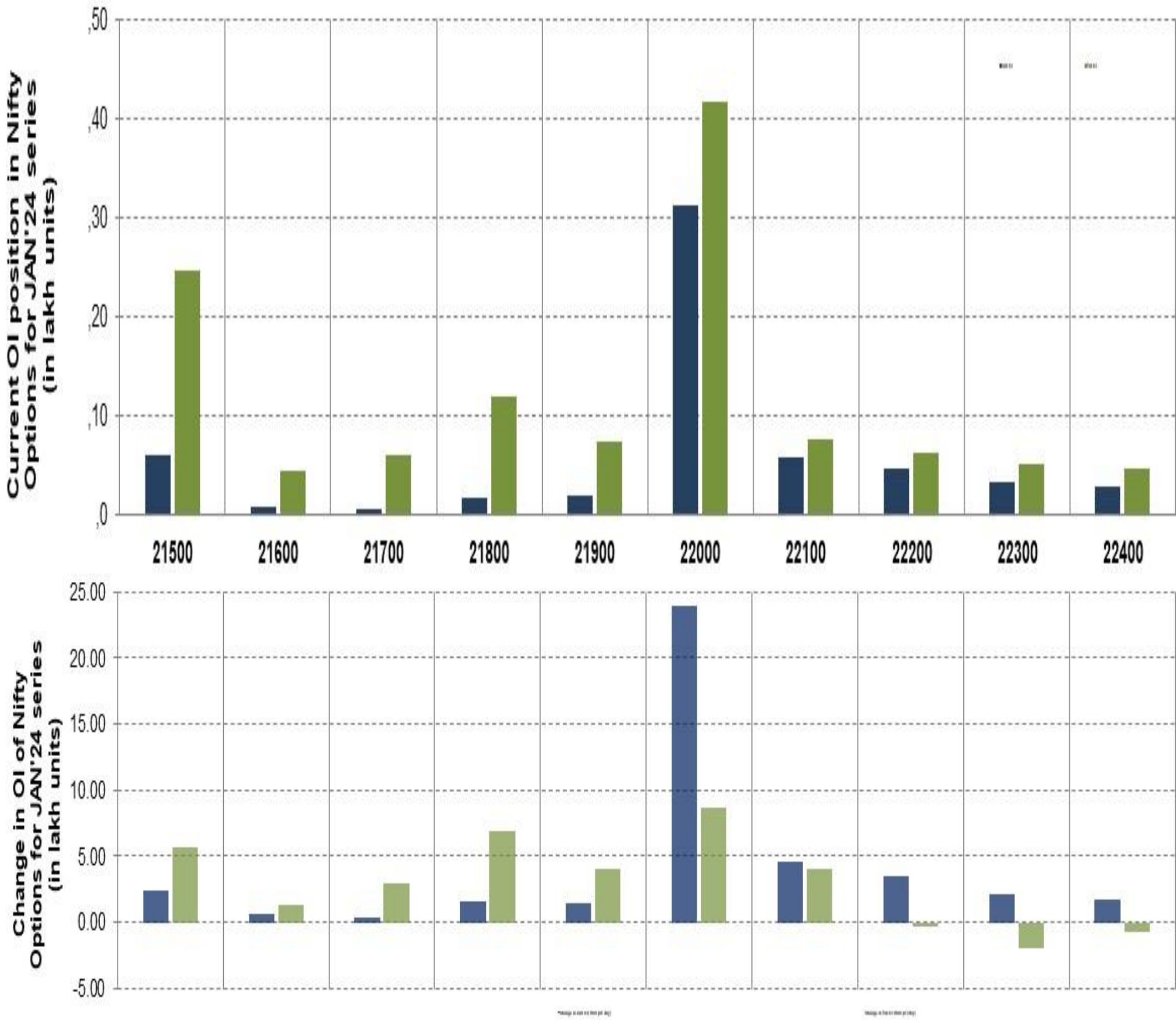
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 2.38 million in Open Interests is **Strike Price of 23000**
- **Most Active Nifty Put** with an addition of 0.87 millions in Open Interests is **Strike Price of 23000**
- **Maximum Open Interest** an outstanding was 3.11 millions for Calls at **Strike Price of 23000**
- **Maximum Open Interest** an outstanding was 4.16 millions for puts at **Strike Price of 23000**

Disclaimer



The Information provided by SMS or in newsletter or in any document has been prepared by Shah Investor's Home Ltd (SIHL). The Information provided by SMS or in newsletter does not constitute an offer or solicitation for the purchase or sale of any financial instrument or as an official confirmation of any transaction. The information contained herein is from publicly available data or other sources believed to be reliable, but we do not represent that it is accurate or complete and it should not be relied on as such. SIHL or any of its affiliates/ group companies shall not be in any way responsible for any loss or damage that may arise to any person from any error in the information contained in this report or SMS. This Information provided by SMS, reports or in newsletter is provided for assistance only and is not intended to be and must not alone be taken as the basis for an investment decision. The user assumes the entire risk of any use made of this information. Each recipient of this Information provided by SMS, report or in newsletter should make such investigation as it deems necessary to arrive at an independent evaluation of an investment in the securities of companies referred to in this information provided by SMS, report or in newsletter (including the merits and risks involved), and should consult his own advisors to determine the merits and risks of such investment. The investment discussed or views expressed may not be suitable for all investors. This information is strictly confidential and is being furnished to you solely for your information.

The information should not be reproduced or redistributed or passed on directly or indirectly in any form to any other person or published, copied, in whole or in part, for any purpose. The information provided by report or SMS is not directed or intended for distribution to, or use by, any person or entity who is a citizen or resident of or located in any locality, state, country or other jurisdiction, where such distribution, publication, availability or use would be contrary to law, regulation or which would subject SIHL and affiliates/ group companies to any registration or licensing requirements within such jurisdiction. The distribution of this Information provided by SMS or in newsletter in certain jurisdictions may be restricted by law, and persons in whose possession this Information provided by SMS or in newsletter comes, should inform themselves about and observe, any such restrictions. The information given or Information provided by SMS, report or in newsletter is as of the date of the issue date of report or the date on which SMS provided and there can be no assurance that future results or events will be consistent with this information. This information is subject to change without any prior notice. SIHL reserves the right to make modifications and alterations to this statement as may be required from time to time. However, SIHL is under no obligation to update or keep the information current.

Nevertheless, SIHL is committed to providing independent and transparent recommendation to its client and would be happy to provide any information in response to specific client queries. Neither SIHL nor any of its affiliates, group companies, directors, employees, agents or representatives shall be liable for any damages whether direct, indirect, special or consequential including lost revenue or lost profits that may arise from or in connection with the use of the information. Past performance is not necessarily a guide to future performance. The disclosures of interest statements incorporated in the Information provided by SMS, report or in newsletter are provided solely to enhance the transparency and should not be treated as endorsement of the views expressed in the report. The analyst for this report certifies that all of the views expressed in this report accurately reflect his or her personal views about the subject company or companies and its or their securities, and no part of his or her compensation was, is or will be, directly or indirectly related to specific recommendations or views expressed in this report.