



# MORNING MANTRA



Daily Derivatives & Market Report

FEB 10, 2025



Indian equity markets extended their downward trade for fourth straight session on Monday amid fresh concerns over new US tariff. Markets made negative start and remained lower till the end of the session as traders were concerned ahead of IIP and CPI data, to be released on February 12.

Some of the important factors for the markets:

**Trump tariff concerns:** US President Donald Trump announced plans to impose 25 percent tariffs on all steel and aluminium imports, escalating trade tensions. He also signalled potential reciprocal tariffs on nations that tax US imports, along with duties on pharmaceuticals, oil, and semiconductors.

**Sustained foreign fund outflows:** Some concern came as exchange data showed Foreign Institutional Investors (FIIs) offloaded equities worth Rs 470.39 crore on Friday.

**India's exports likely to touch record \$800 billion in 2024-25 fiscal year:** Commerce and Industry Minister Piyush Goyal said the country's exports are growing significantly and would achieve a record \$800 billion in 2024-25 fiscal year. He added 'exports have been growing and have risen significantly in the last four years.

**Global front:** European markets were trading mostly in green amid European Central Bank Governing Council member Boris Vujcic said that expectations for three more rate reductions this year are reasonable. Asian markets ended mixed after a measure of the public assessment of the current situation of the Japanese economy weakened unexpectedly at the start of the year, and future conditions also remained pessimistic. The survey data from the Cabinet Office showed that the current conditions index of the Economy Watchers' Survey, which measures the present situation of the economy, dropped to 48.6 in January from 49.0 in December.

# MARKET SELFIE



## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	77311.80	-548.39	-0.70
NIFTY	23381.60	-178.35	-0.76
MIDCAP	42162.36	-887.91	-2.06
SMLCAP	49034.88	-1129.34	-2.25
BSEFMC	19928.86	-121.97	-0.61
HEALTHCARE	42180.32	-969.56	-2.25
AUTO	51900.28	-771.38	-1.46
POWER	6112.38	-151.86	-2.42
REALTY	6963.19	-192.39	-2.69
BSE IT	41850.22	-380.77	-0.90
BANKEX	56640.58	-137.11	-0.24
OIL GAS	24449.60	-459.85	-1.85
METAL	28153.89	-759.09	-2.63
INDIA VIX	14.45	0.76	5.55

## ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	724	2271	37
BSE	1070	3033	122

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	4323	4548	(5)
NSE CASH	74020	88909	(17)
NSE F&O	126317	177863	(29)

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	20.82	3.48	1.36
SENSEX	21.52	3.98	1.14

# KEY NUMBERS TRACKER



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

FII-DII*	Buy	Sell	Net
DII	9802	8287	1516
FII	9608	12072	(2464)

Note: FPI & DII Figures are provisional

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

FII	Buy	Sell	Net
Index Futures	1976.16	3790.81	(1815)
Index Options	643658.14	636935.35	6723
Stock Futures	15783.11	17780.16	(1997)
Stock Options	60924.91	62738.49	(1814)

## PUT-CALL RATIO

Index	Current	Previous
NIFTY	0.75	0.83
BANK NIFTY	0.82	0.85

## DOLLAR INDEX

Dollar Index	Current	Previous	% Change
DXY	108.20	108.25	-0.05

## 10-YEARS G-SEC YIELD

Country	Current	Previous	% Change
INDIA	6.714	6.699	0.22
USA	4.496	4.487	0.20

## KEY COMMODITIES TRACKER (in \$)

Commodity	Current	Change Points	% Change
Gold	2905.00	46.46	1.62
Silver	32.30	0.50	1.59
Crude-Oil	71.65	0.65	0.92
Brent-Crude	75.34	0.69	0.92

# CURRENCY FUTURES & INDEX TRENDS TRACKER



## CURRENCY FUTURES

Expiry	Close	Change Points	% Change
25 FEB-24 USD-INR	87.59	0.01	0.02
25 FEB-24 EUR-INR	90.64	-0.29	-0.32
25 FEB-24 GBP-INR	108.69	-0.33	-0.30
25 FEB-24 JPY- INR	58.01	0.10	0.18

## INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS

Index	Close	S2	S1	Pivot	R1	R2
NIFTY	23382	23170	23276	23422	23528	23674
SENSEX	77312	76680	76996	77423	77739	78165
NIFTY FUTURES	23459	23255	23357	23490	23592	23725
BANK NIFTY	49981	49494	49738	49947	50190	50399
CNX IT	42597	42231	42414	42694	42876	43156
CNX MIDCAP	52471	51447	51959	52817	53329	54187
CNX SMALLCAP	16649	16265	16457	16754	16946	17243
INDIA VIX	14.44	13.24	13.84	14.28	14.88	15.32

## INDEX TREND ANALYSIS

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

## SECURITIES BAN IN F&O TRADES FOR 11-02-2025

MANAPPURAM

# TECHNICAL VIEWS



## NIFTY

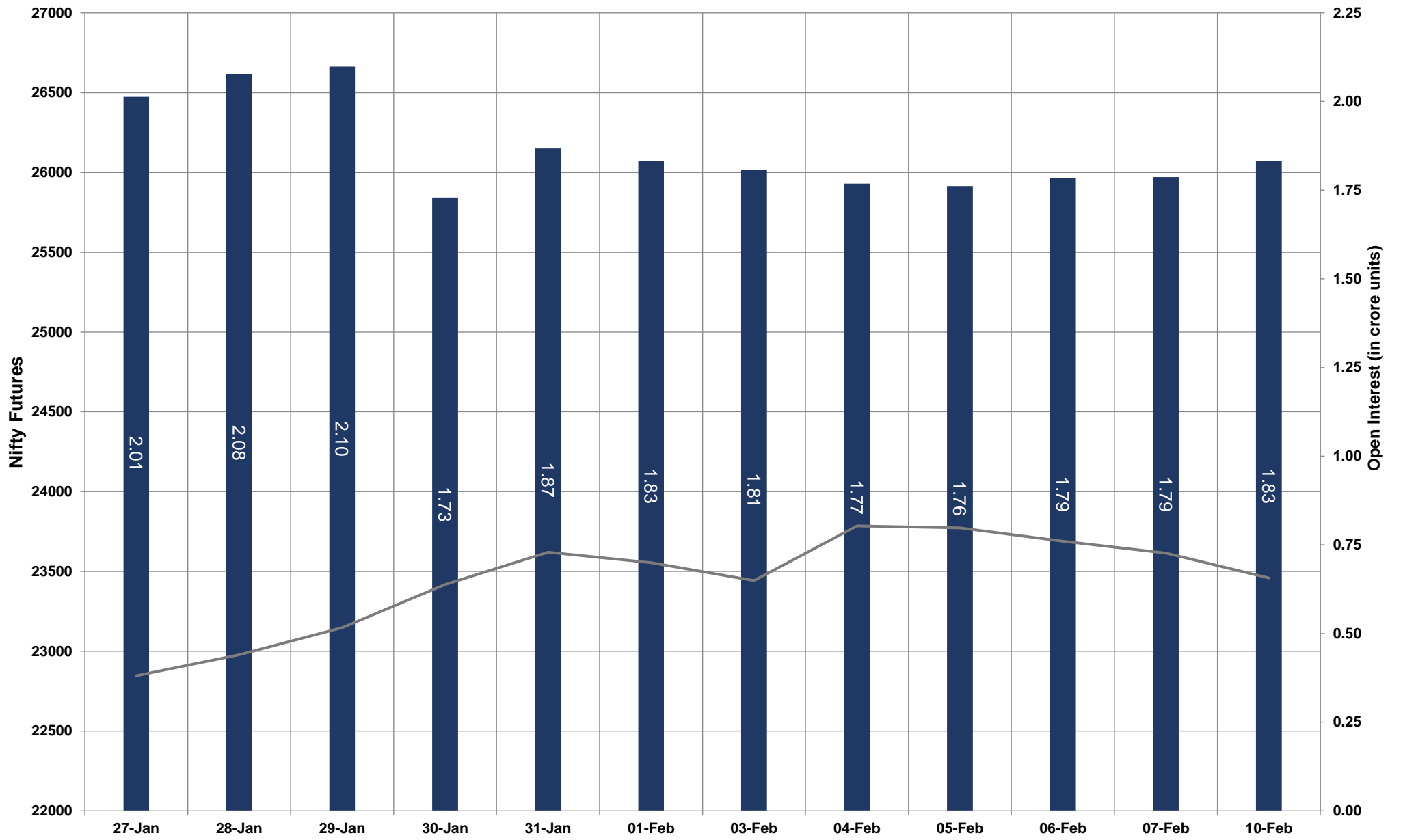


- Nifty Cash = **23381.60 (-0.76%)**
- Resistance levels = **23500** and **23650**
- Support levels = **23280** and **23150**

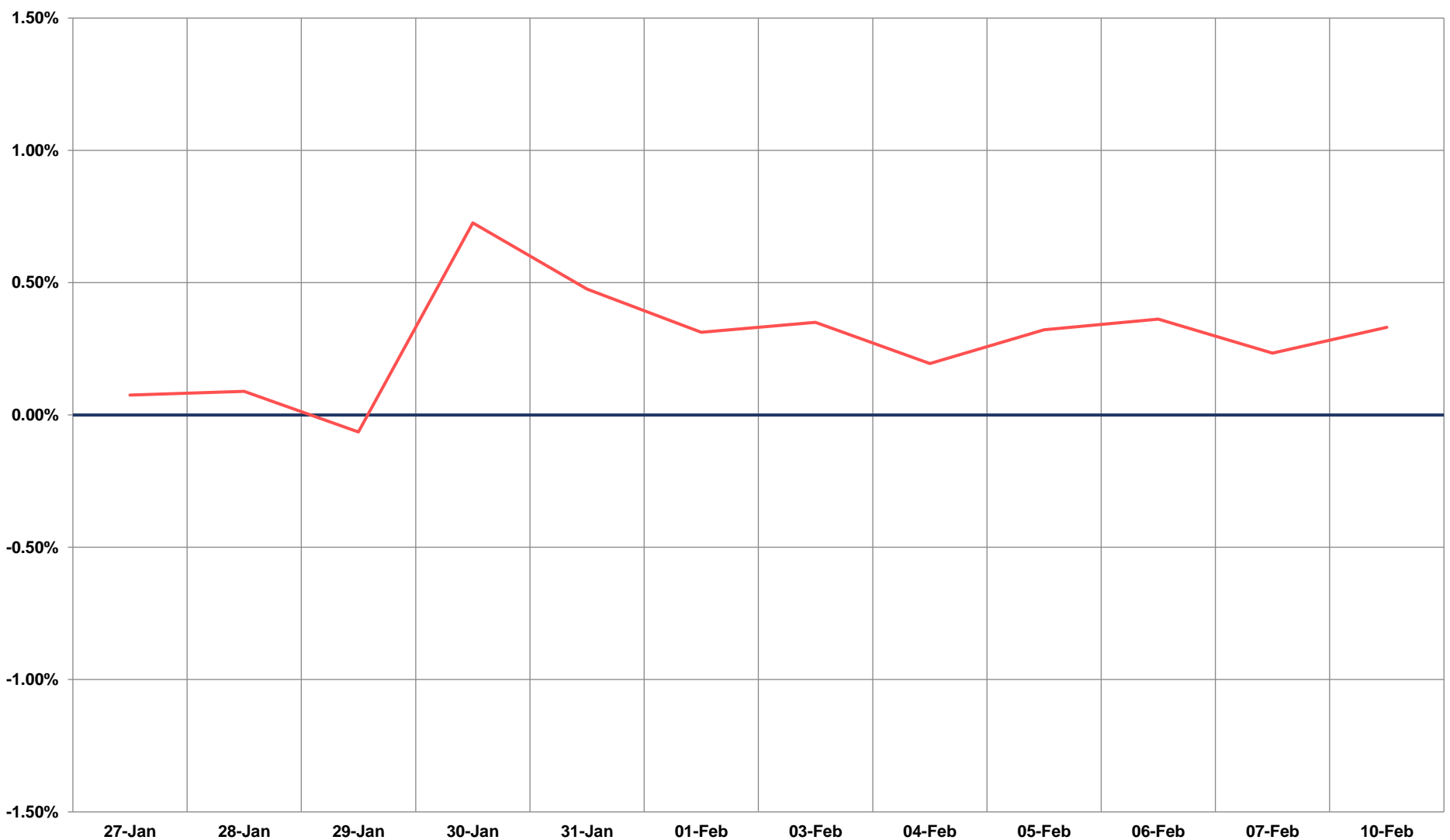
# TECHNICAL VIEWS



## NIFTY FUTURES



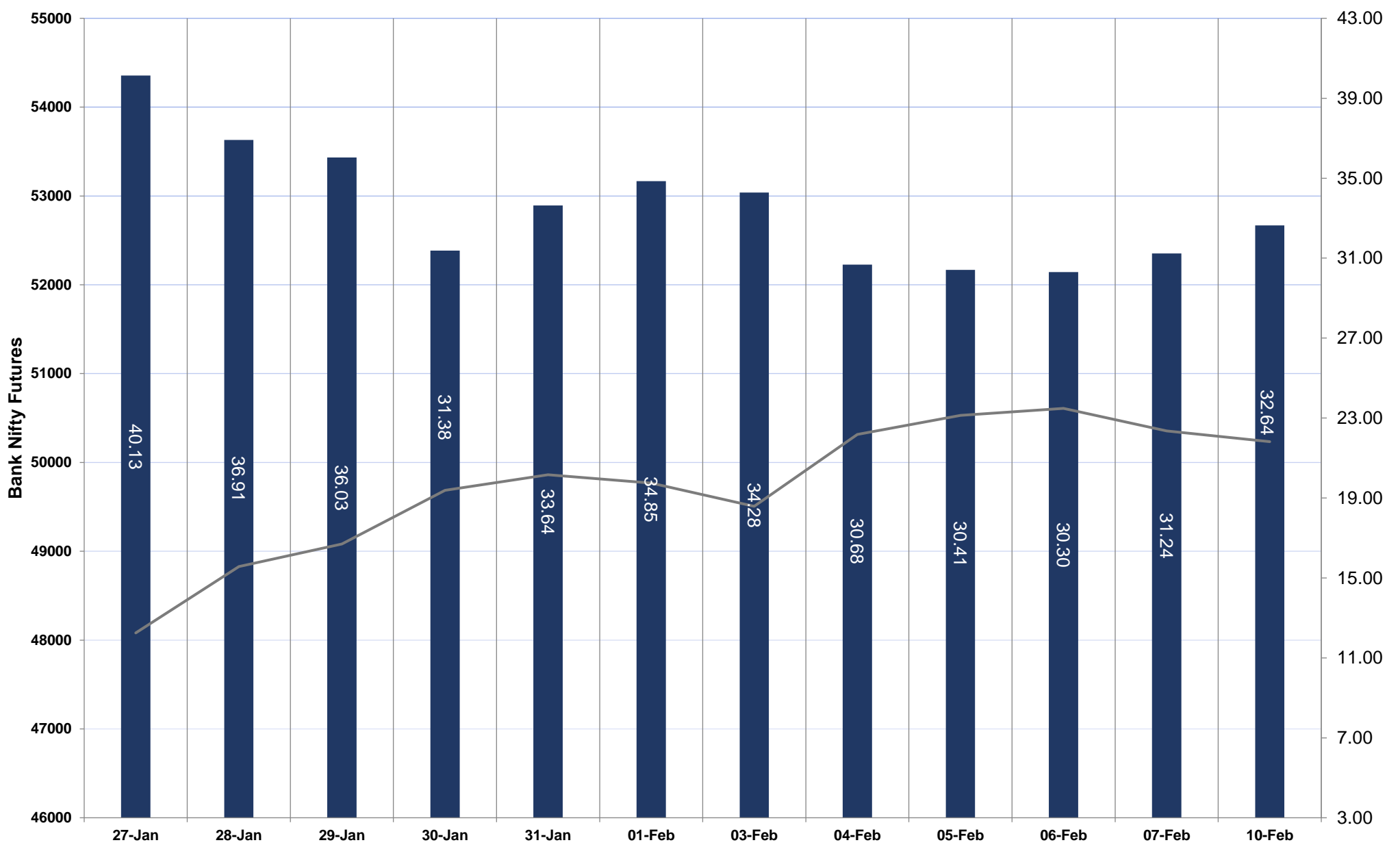
## SPREAD: FUTURE & SPOT



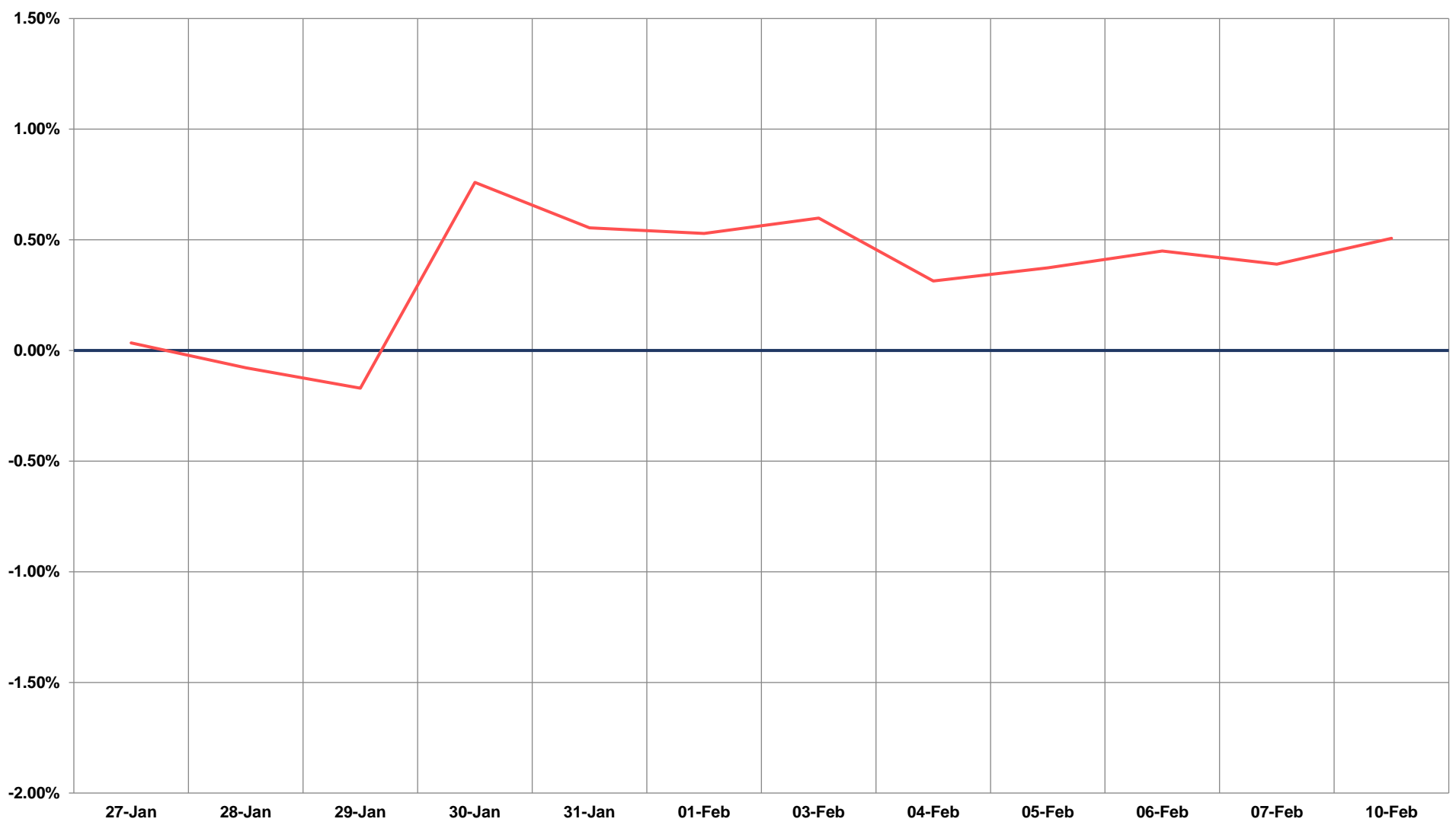
# TECHNICAL VIEWS



## BANK NIFTY FUTURES



## SPREAD: FUTURE & SPOT

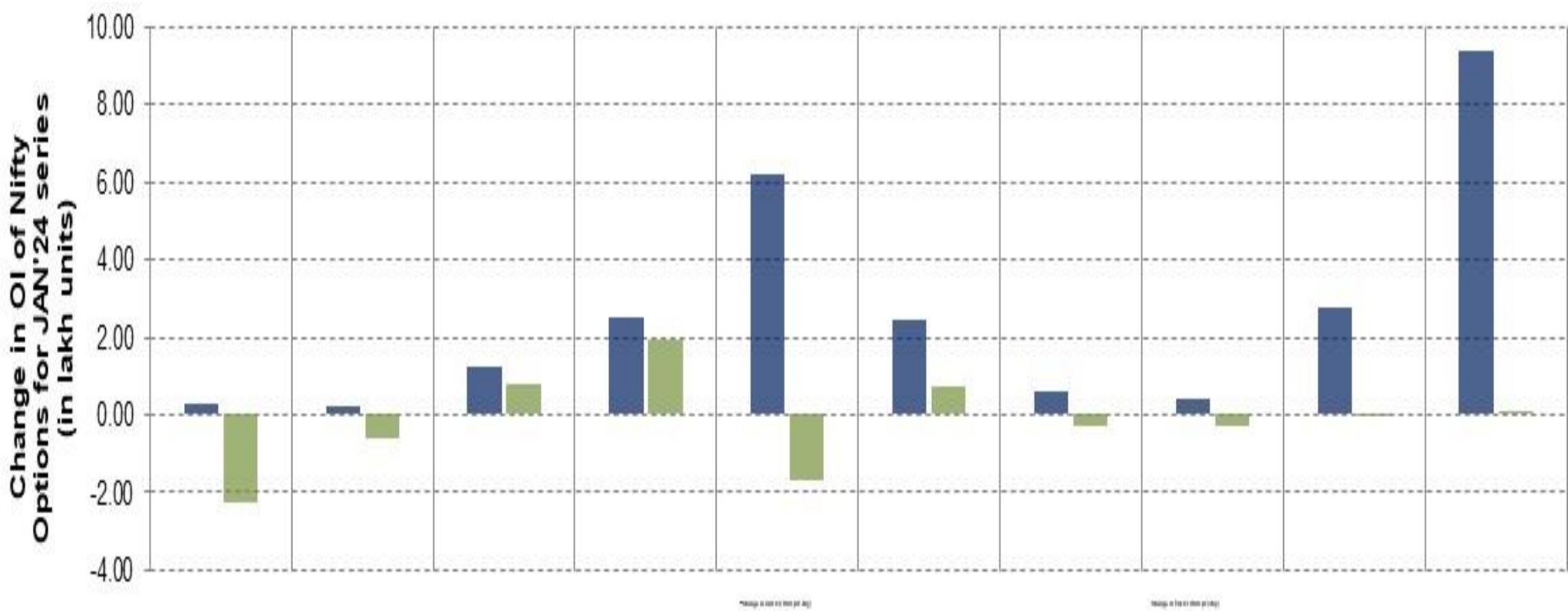
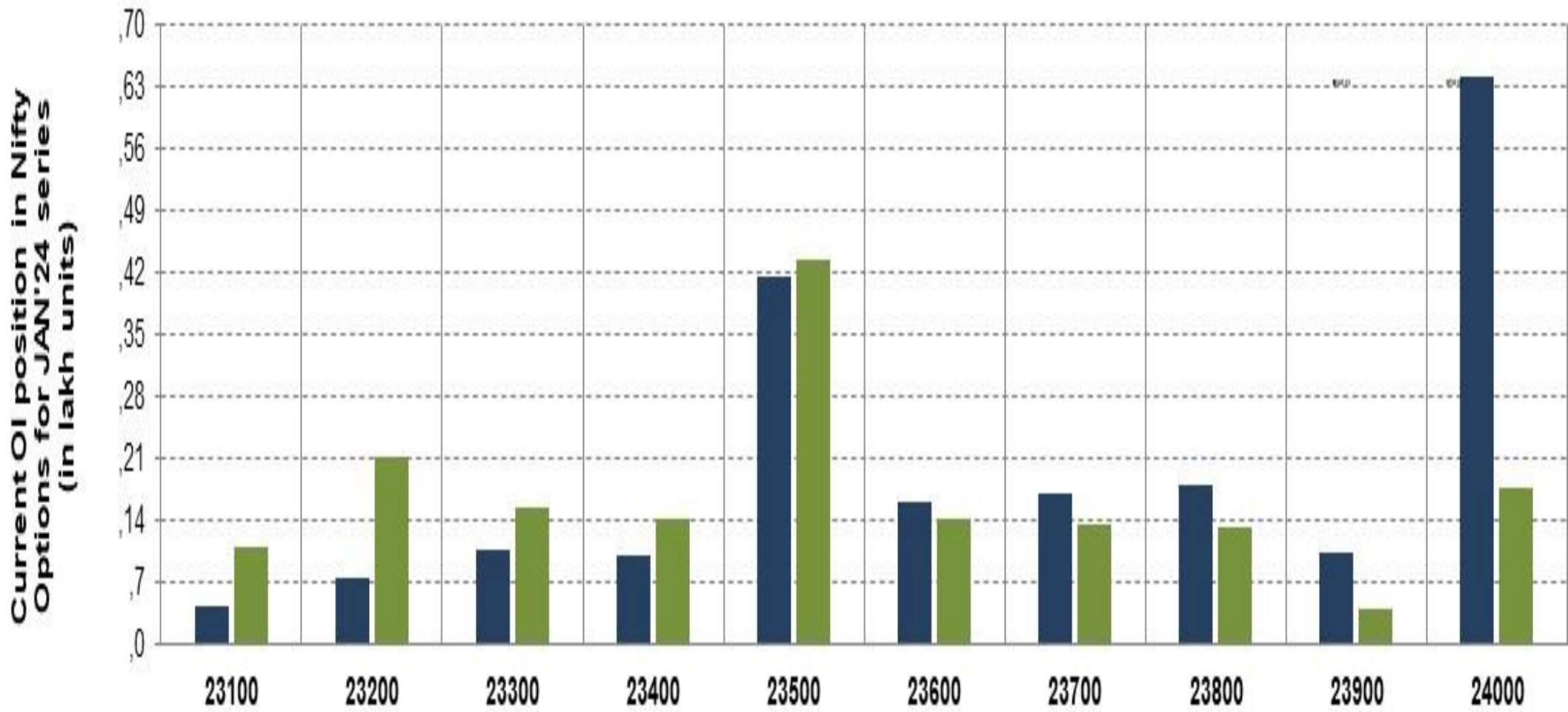




# TECHNICAL VIEWS



## NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.93 million in Open Interests is **Strike Price of 24000**
- **Most Active Nifty Put** with an addition of 0.19 millions in Open Interests is **Strike Price of 23400**
- **Maximum Open Interest an outstanding** was 6.38 millions for Calls at **Strike Price of 24000**
- **Maximum Open Interest an outstanding** was 4.33 millions for puts at **Strike Price of 23500**

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