



MORNING MANTRA



Daily Derivatives & Market Report

FEB 13, 2025



Local equity benchmarks settled Thursday's trading session below neutral line and continued their losing streak for 7th straight session, amid mixed global cues and mixed macroeconomic data. After making cautious start, soon markets turned positive and extended their gains to trade higher, as some support came with Commerce and industry minister Piyush Goyal's statement that the combination of growth driven by consumption, alongside growth propelled by investment can serve as twin pillars for India's economic advancement. In final hour of trade, indices wipe out their gains and ended slightly lower.

Some of the important factors in today's trade:

Continuous foreign fund outflows: Foreign institutional investors (FIIs) offloaded equities worth Rs 4,486.41 crore in the capital markets on a net basis on Tuesday, according to exchange data.

Industrial growth eases in December: Some cautiousness came as the government data showed that India's industrial production growth, measured by the Index of Industrial Production (IIP) eased to 3.2% in December, down from a 6-month high of 5.2% in the previous month.

CPI Inflation falls to 4.31% in January: Traders overlooked data showing India's retail inflation, based on the Consumer Price Index (CPI), for January stood at 4.31 per cent, dropping significantly from 5.22 per cent in December.

Global front: Most of the European markets were trading in green, amid improving prospects for a peace settlement in Russia-Ukraine war. Asian markets ended mixed pressured by the woes that the interest rates will be kept unchanged for a prolonged period followed by the release on bigger than expected rise in US consumer price inflation.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	76138.97	-32.11	-0.04
NIFTY	23031.40	-13.85	-0.06
MIDCAP	40788.11	27.72	0.07
SMLCAP	46933.69	-202.68	-0.43
BSEFMC	19318.01	-128.37	-0.66
HEALTHCARE	41023.28	203.35	0.50
AUTO	50020.32	-165.19	-0.33
POWER	5984.76	13.14	0.22
REALTY	6618.15	47.39	0.72
BSE IT	40606.60	-380.50	-0.93
BANKEX	56115.91	-64.79	-0.12
OIL GAS	23754.04	-79.95	-0.34
METAL	28062.35	349.92	1.26
INDIA VIX	14.96	0.06	0.40

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1519	1406	40
BSE	1847	2097	130

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	4676	6067	(23)
NSE CASH	84309	104442	(19)
NSE F&O	167562	217527	(23)

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	20.51	3.43	1.45
SENSEX	21.20	3.92	1.23

KEY NUMBERS TRACKER



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

FII-DII*	Buy	Sell	Net
DII	13148	10214	2935
FII	12124	14914	(2790)

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	3828.00	3315.78	512
Index Options	2434022.14	2426947.66	7074
Stock Futures	19862.69	18701.64	1161
Stock Options	72928.35	76352.67	(3424)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	0.75	0.75
BANK NIFTY	0.79	0.79

DOLLAR INDEX

Dollar Index	Current	Previous	% Change
DXY	107.68	107.96	-0.26

10-YEARS G-SEC YIELD

Country	Current	Previous	% Change
INDIA	6.711	6.697	0.21
USA	4.592	4.634	-0.91

KEY COMMODITIES TRACKER (in \$)

Commodity	Current	Change Points	% Change
Gold	2914.75	9.08	0.32
Silver	32.27	0.009	0.03
Crude-Oil	70.64	-0.73	-1.02
Brent-Crude	74.47	-0.71	-0.94

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES

Expiry	Close	Change Points	% Change
25 FEB-24 USD-INR	87.04	-0.00	-0.00
25 FEB-24 EUR-INR	90.72	0.37	0.41
25 FEB-24 GBP-INR	108.68	0.35	0.32
25 FEB-24 JPY- INR	56.82	-0.37	-0.66

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS

Index	Close	S2	S1	Pivot	R1	R2
NIFTY	23031	22843	22937	23086	23181	23330
SENSEX	76139	75555	75847	76306	76598	77057
NIFTY FUTURES	23108	22917	23013	23161	23257	23405
BANK NIFTY	49360	48931	49145	49491	49705	50051
CNX IT	41316	40719	41017	41481	41779	42243
CNX MIDCAP	50881	50148	50515	51036	51402	51923
CNX SMALLCAP	15974	15780	15877	16042	16138	16303
INDIA VIX	14.96	10.95	12.95	14.21	16.21	17.47

INDEX TREND ANALYSIS

Index	Daily	Weekly	Monthly
NIFTY	SELL	NEUTRAL	NEUTRAL
SENSEX	SELL	NEUTRAL	NEUTRAL
NIFTY FUTURES	SELL	NEUTRAL	NEUTRAL
BANK NIFTY	SELL	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 14-02-2025

MANAPPURAM

TECHNICAL VIEWS



NIFTY

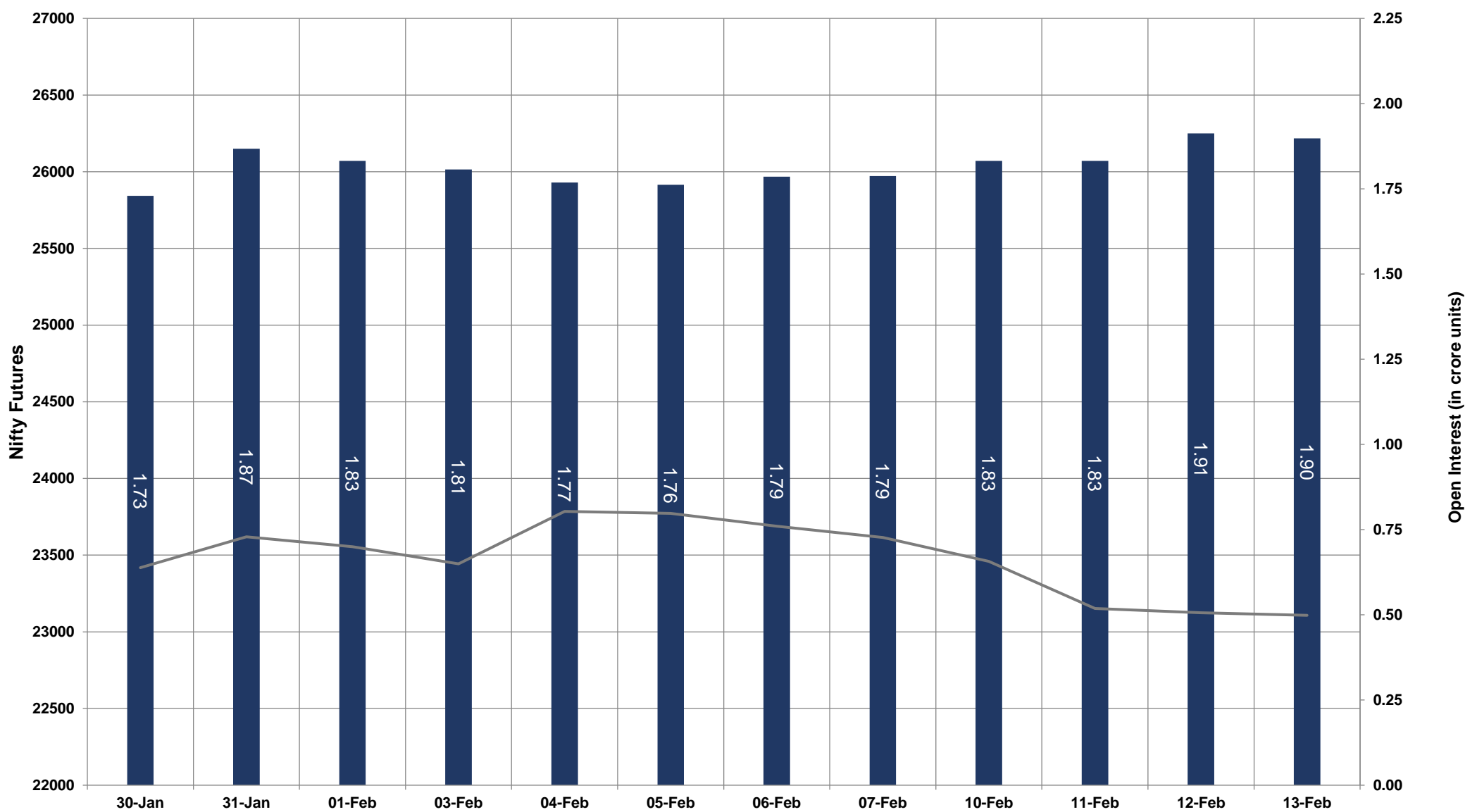


- Nifty Cash = **23031.4 (-0.06%)**
- Resistance levels = **23200** and **23350**
- Support levels = **22950** and **22800**

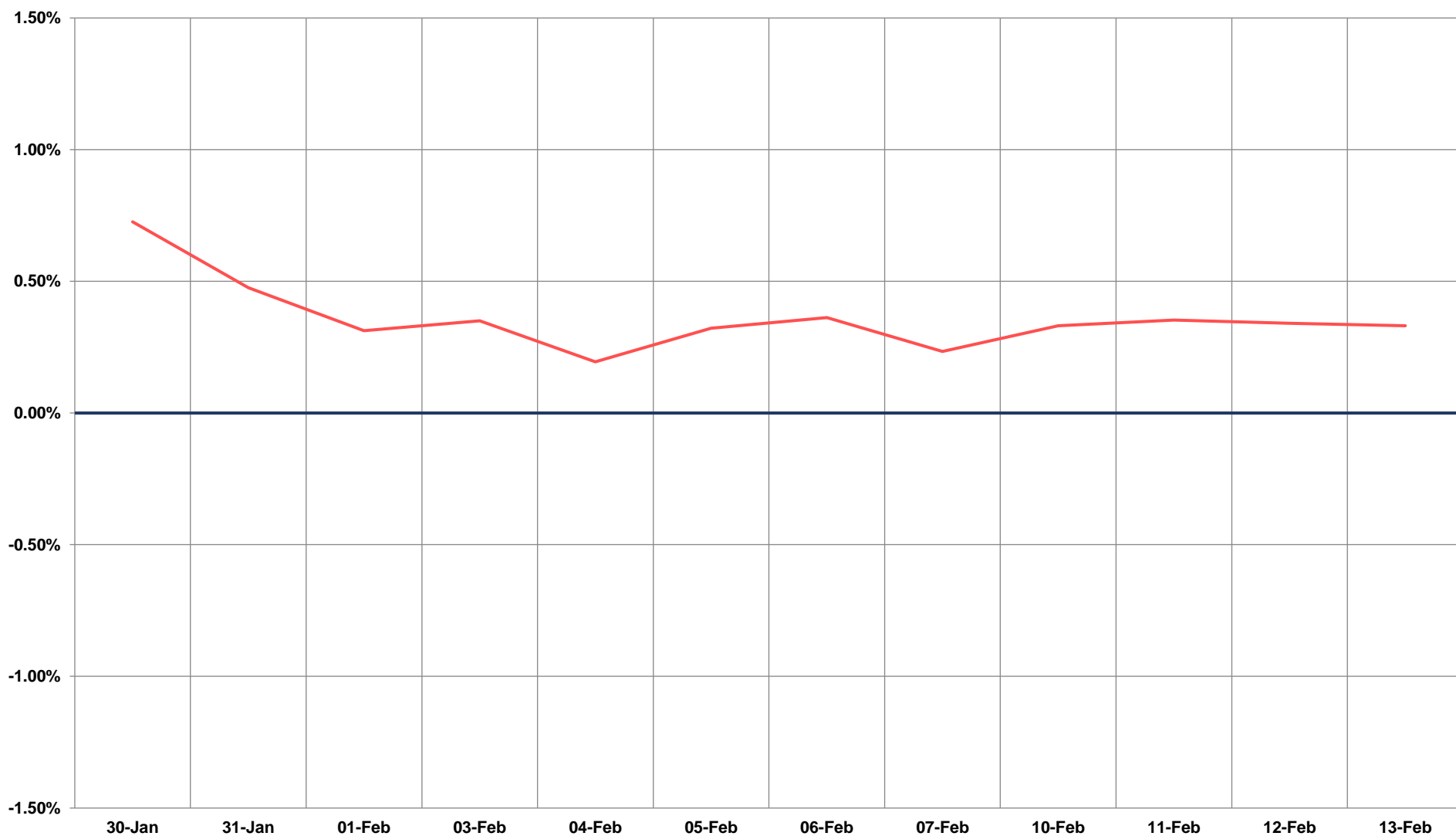
TECHNICAL VIEWS



NIFTY FUTURES



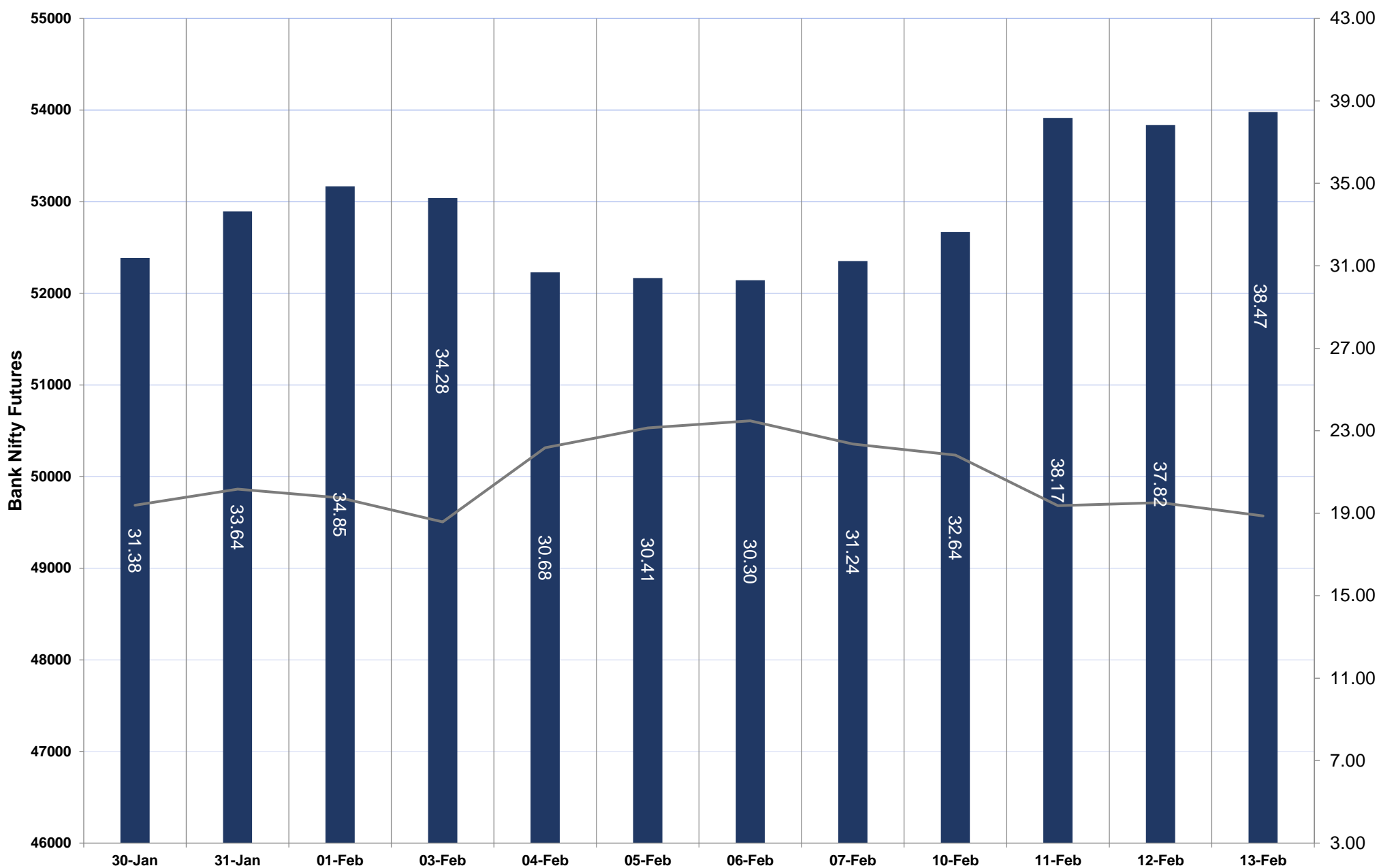
SPREAD: FUTURE & SPOT



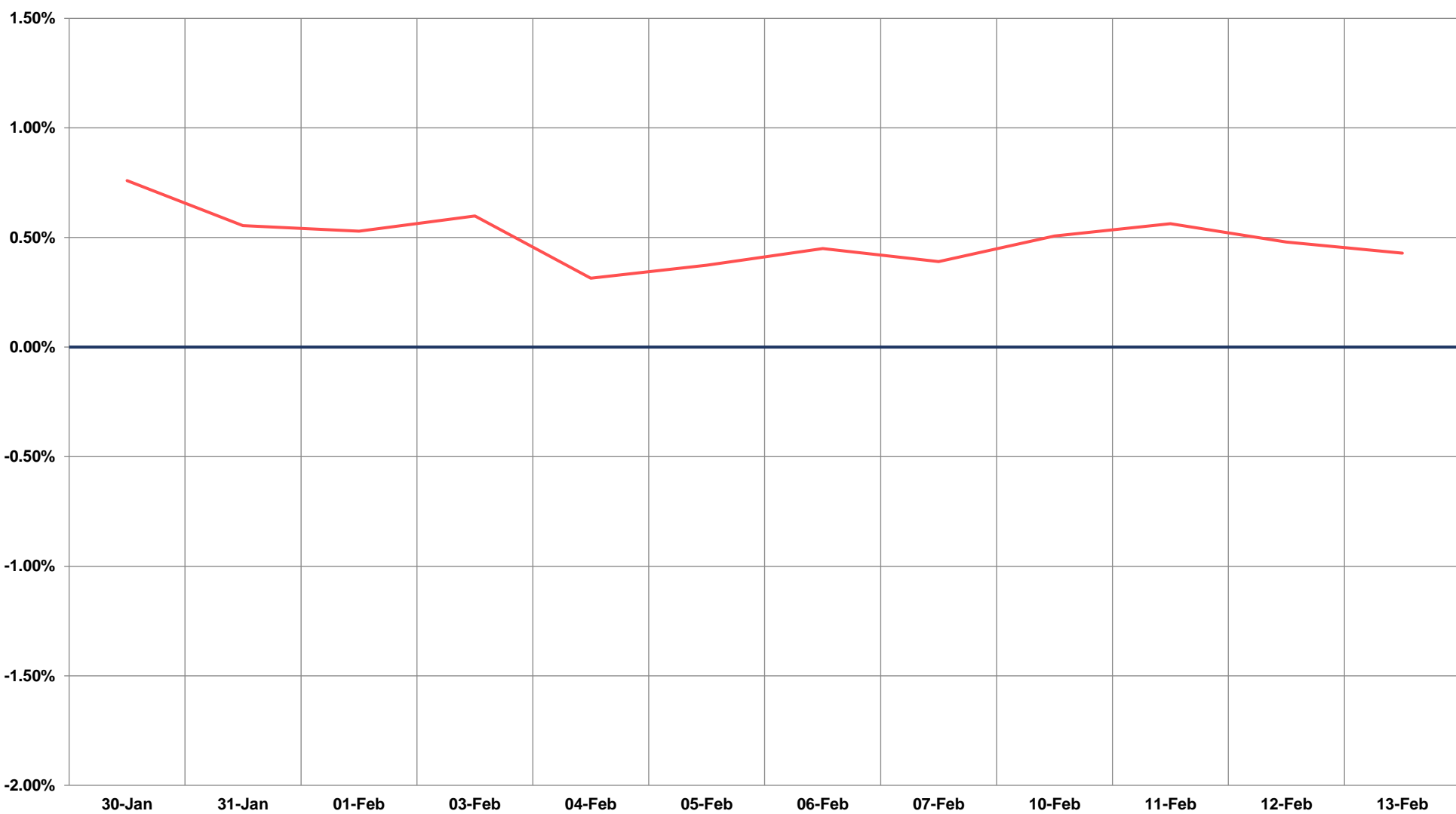
TECHNICAL VIEWS



BANK NIFTY FUTURES



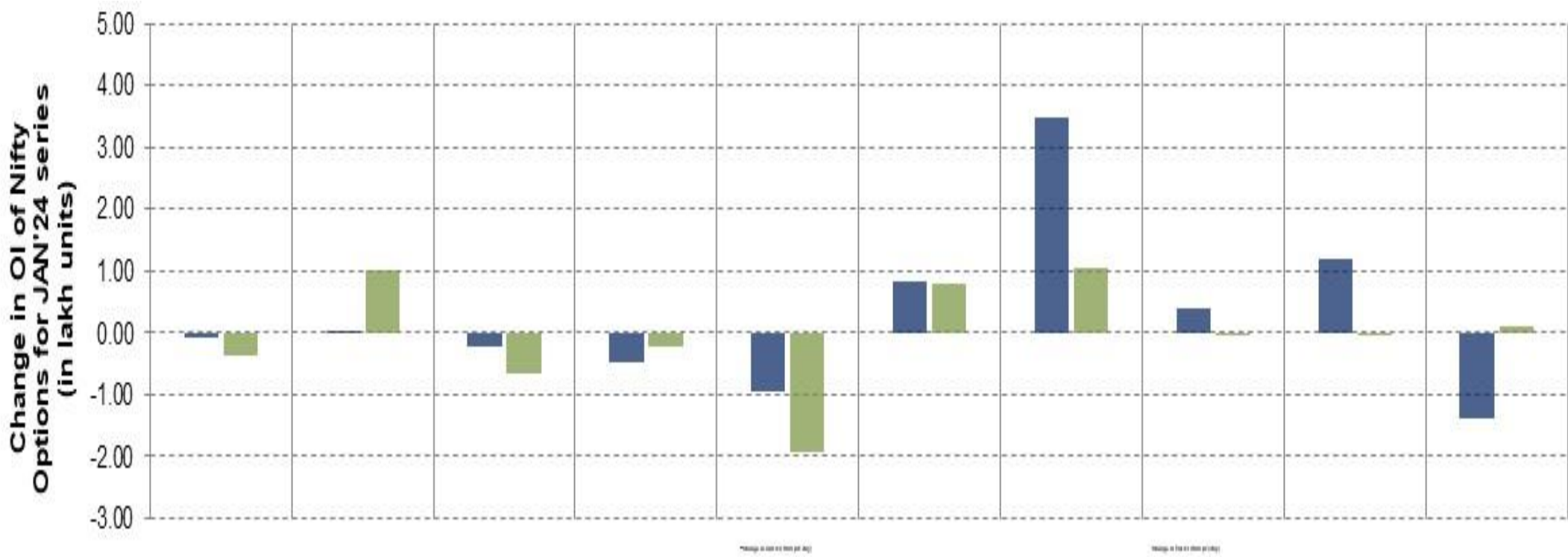
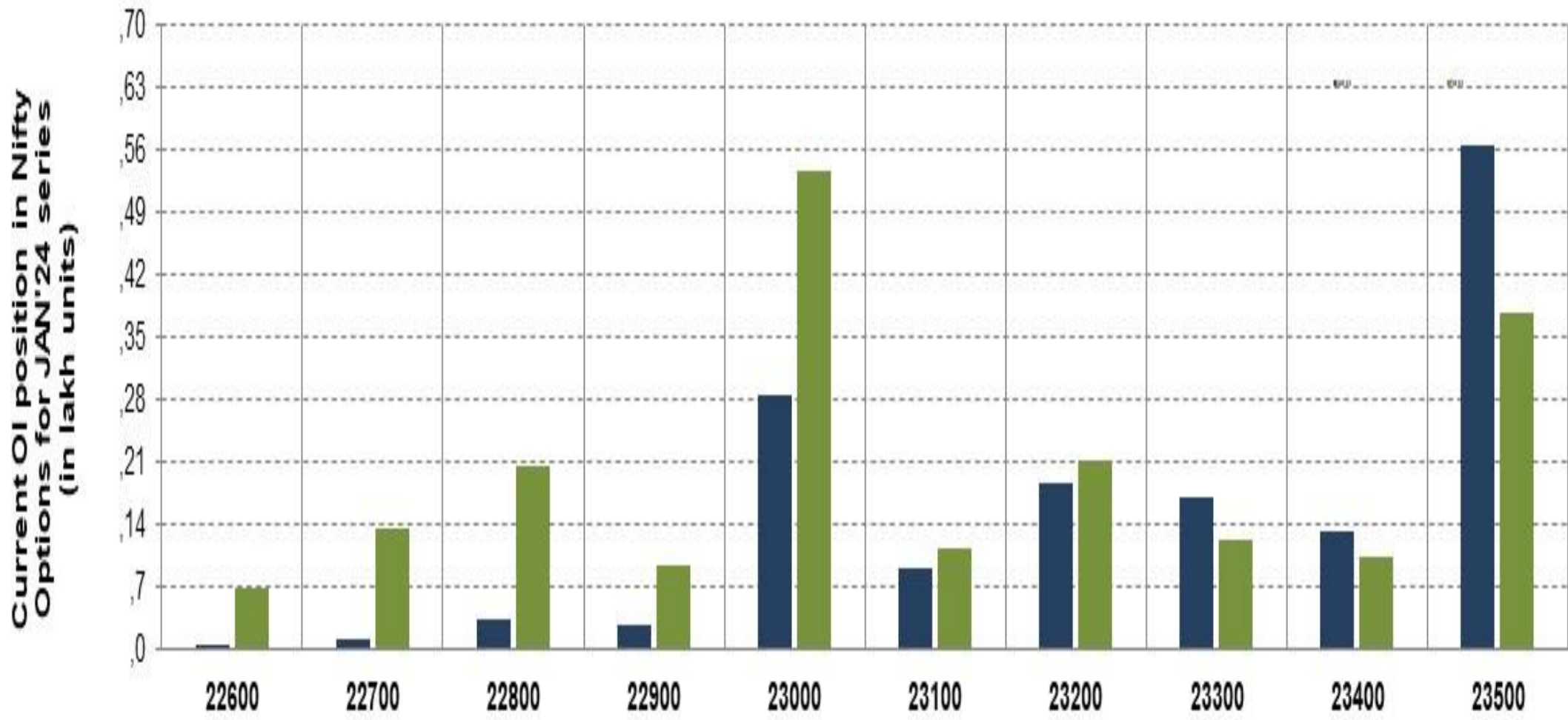
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.35 million in Open Interests is **Strike Price of 23200**
- **Most Active Nifty Put** with an addition of 0.10 millions in Open Interests is **Strike Price of 23200**
- **Maximum Open Interest an outstanding** was 5.62 millions for Calls at **Strike Price of 23500**
- **Maximum Open Interest an outstanding** was 5.34 millions for puts at **Strike Price of 23000**

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