



MORNING MANTRA



Daily Derivatives & Market Report

FEB 18, 2025



After witnessing selling pressure in initial trade, local equity benchmarks snapped eight-day losing streak on Monday amid reports that Trump's tariff reciprocity on Indian exports is likely to be limited. Markets made a gap-down opening, but managed to come off from day's low in noon deals, as investors took some supports with Institute of Chartered Accountants of India (ICAI) stating that the new Income Tax Bill will simplify the country's six-decade old tax structure as well as help boost growth of MSMEs.

Some of the important factors in today's trade:

India, US trade agreement lifts business confidence: Sentiments were upbeat with Commerce and Industry Minister Piyush Goyal's statement that the announcement to negotiate a bilateral trade agreement between India and the US has boosted business confidence in both countries, as it can help further strengthen economic ties by leveraging their competitive strengths.

India remains fastest-growing large economy: Traders took some support with Union Minister Ashwini Vaishnaw's statement that the country remains the fastest-growing large economy while keeping inflation under control.

Foreign fund outflows intensify: Foreign Portfolio Investors (FPIs) offloaded equities worth Rs 4,294.69 crore on Friday. The total outflow by FPIs has reached Rs 99,299 crore -- near Rs 1 lakh crore -- in 2025 so far.

Global front: Most of the European markets were trading in green, despite easing concerns over a global trade war after U.S. President Donald Trump decided to delay the implementation of new reciprocal tariff plans. Most of the Asian markets ended in green, following the mixed cues from Wall Street on Friday. Sentiments got boosted after Hang Seng is trading near its four-month high whetted by the optimism for China's tech sector after the emergence of a low-cost AI model.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	75967.39	-29.47	-0.04
NIFTY	22945.30	-14.20	-0.06
MIDCAP	39858.46	-74.17	-0.19
SMLCAP	44384.72	-772.17	-1.71
BSEFMC	19028.16	-153.69	-0.80
HEALTHCARE	40227.14	-113.30	-0.28
AUTO	48767.55	-321.48	-0.65
POWER	5904.81	34.86	0.59
REALTY	6469.75	-2.23	-0.03
BSE IT	40521.25	219.68	0.55
BANKEX	55907.59	-62.87	-0.11
OIL GAS	23687.73	163.66	0.70
METAL	27880.33	50.43	0.18
INDIA VIX	15.67	-0.05	-0.32

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	912	2063	37
BSE	1042	2912	110

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	4910	4727	4
NSE CASH	84853	82681	3
NSE F&O	137067	160082	(14)

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	20.40	3.42	1.42
SENSEX	21.15	3.91	1.20

KEY NUMBERS TRACKER



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

FII-DII*	Buy	Sell	Net
DII	12793	9721	3072
FII	14538	9751	4787

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	4166.62	4470.00	(303)
Index Options	577999.21	576281.66	1718
Stock Futures	17368.53	17465.29	(97)
Stock Options	84967.71	84081.40	886

PUT-CALL RATIO

Index	Current	Previous
NIFTY	0.83	0.87
BANK NIFTY	0.71	0.75

DOLLAR INDEX

Dollar Index	Current	Previous	% Change
DXY	106.89	106.74	0.14

10-YEARS G-SEC YIELD

Country	Current	Previous	% Change
INDIA	6.686	6.692	-0.09
USA	4.518	4.476	0.94

KEY COMMODITIES TRACKER (in \$)

Commodity	Current	Change Points	% Change
Gold	2911.98	12.87	0.44
Silver	32.48	0.12	0.36
Crude-Oil	71.57	0.24	0.34
Brent-Crude	75.52	0.30	0.40

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES

Expiry	Close	Change Points	% Change
25 FEB-24 USD-INR	87.00	0.05	0.05
25 FEB-24 EUR-INR	90.99	-0.23	-0.25
25 FEB-24 GBP-INR	109.55	0.02	0.01
25 FEB-24 JPY- INR	57.63	0.05	0.09

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS

Index	Close	S2	S1	Pivot	R1	R2
NIFTY	22945	22722	22834	22913	23025	23104
SENSEX	75967	75303	75635	75863	76196	76424
NIFTY FUTURES	22973	22757	22865	22947	23055	23137
BANK NIFTY	49087	48563	48825	49077	49339	49591
CNX IT	41464	40854	41159	41345	41650	41836
CNX MIDCAP	49751	48757	49254	49618	50115	50479
CNX SMALLCAP	15168	14805	14987	15220	15401	15634
INDIA VIX	15.66	14.05	14.85	15.59	16.39	17.13

INDEX TREND ANALYSIS

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

SECURITIES BAN IN F&O TRADES FOR 18-02-2025

MANAPPURAM

TECHNICAL VIEWS



NIFTY

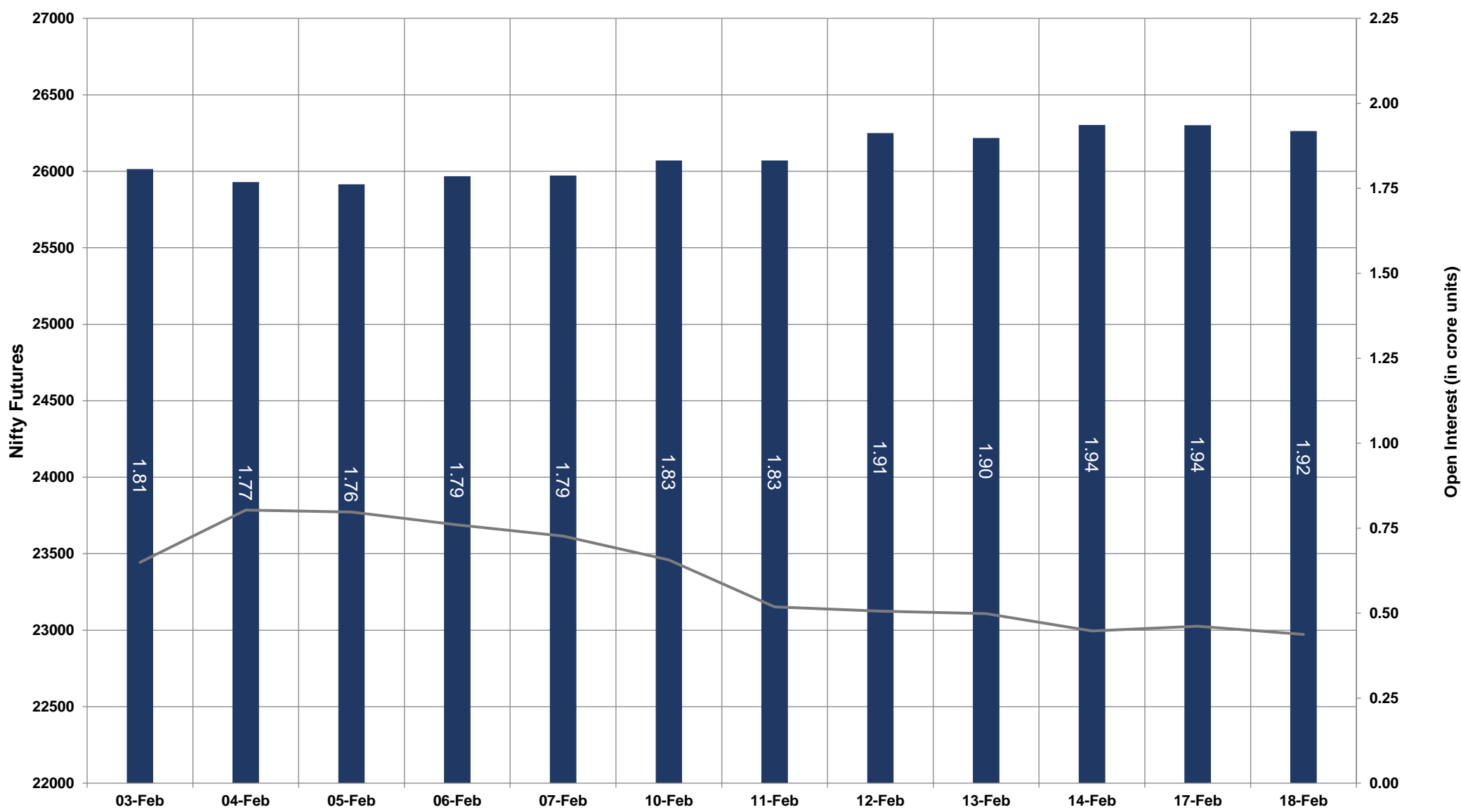


- Nifty Cash = **22945.30 (-0.06%)**
- Resistance levels = **23150** and **23300**
- Support levels = **22800** and **22660**

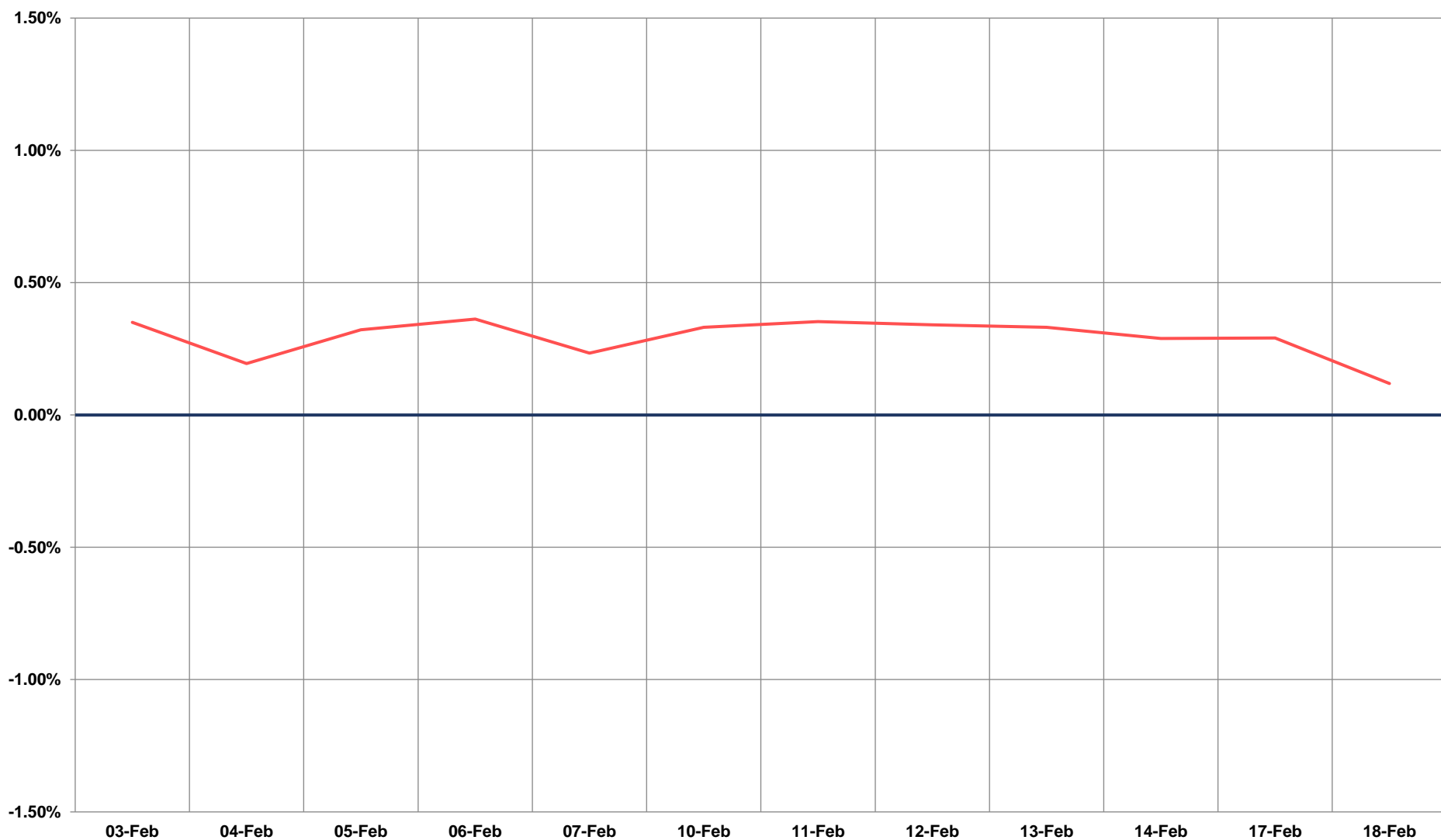
TECHNICAL VIEWS



NIFTY FUTURES



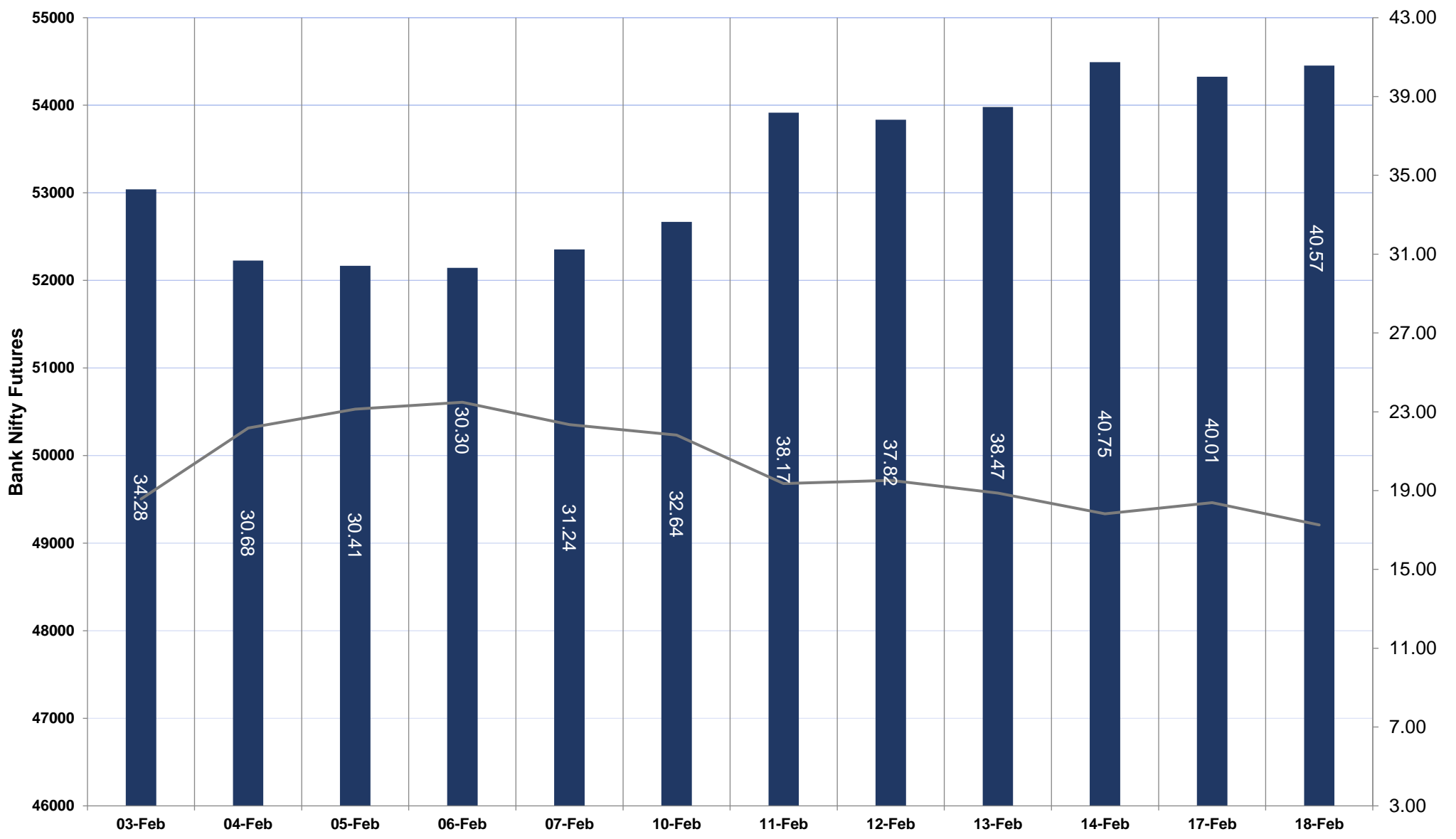
SPREAD: FUTURE & SPOT



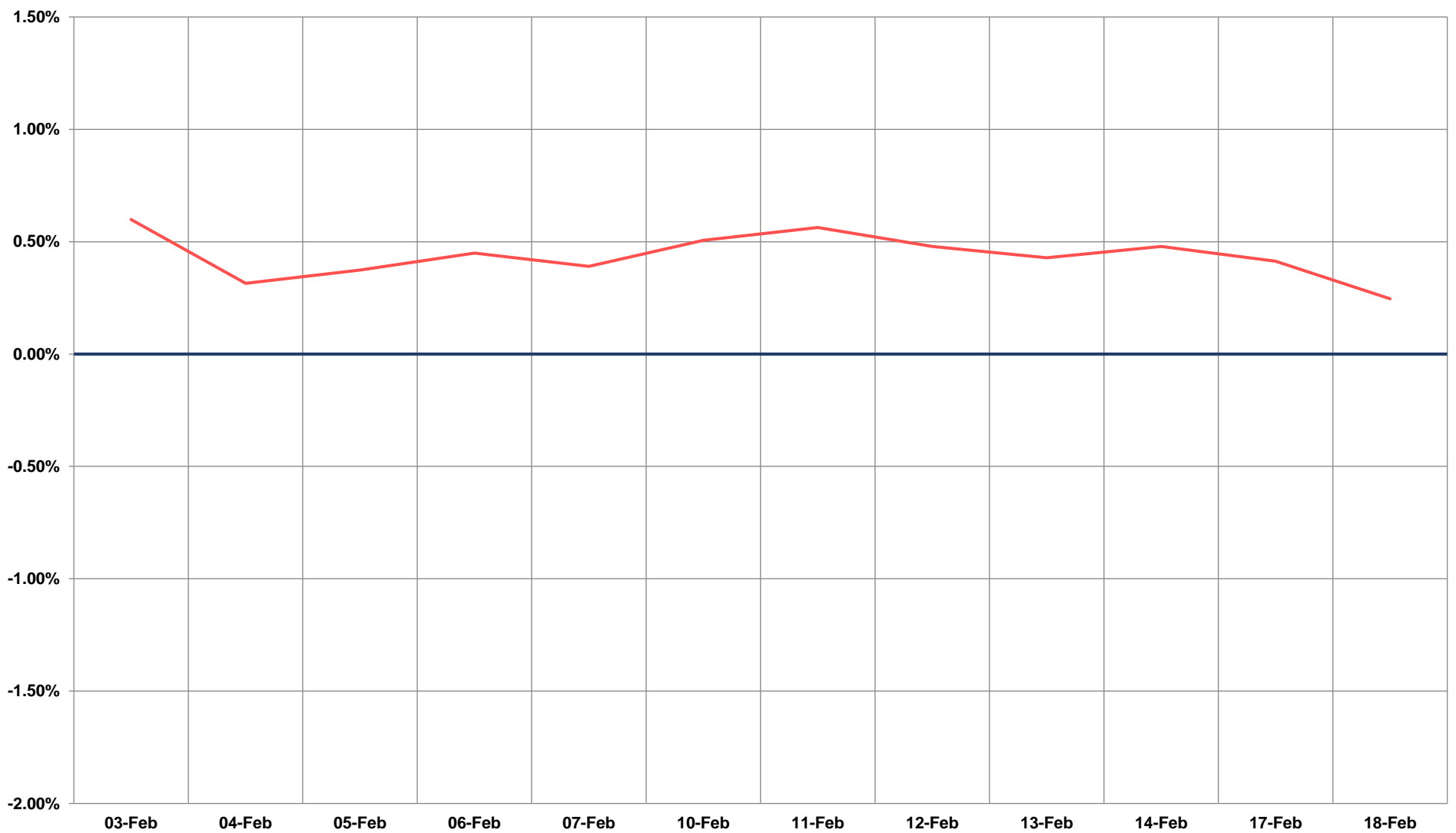
TECHNICAL VIEWS



BANK NIFTY FUTURES



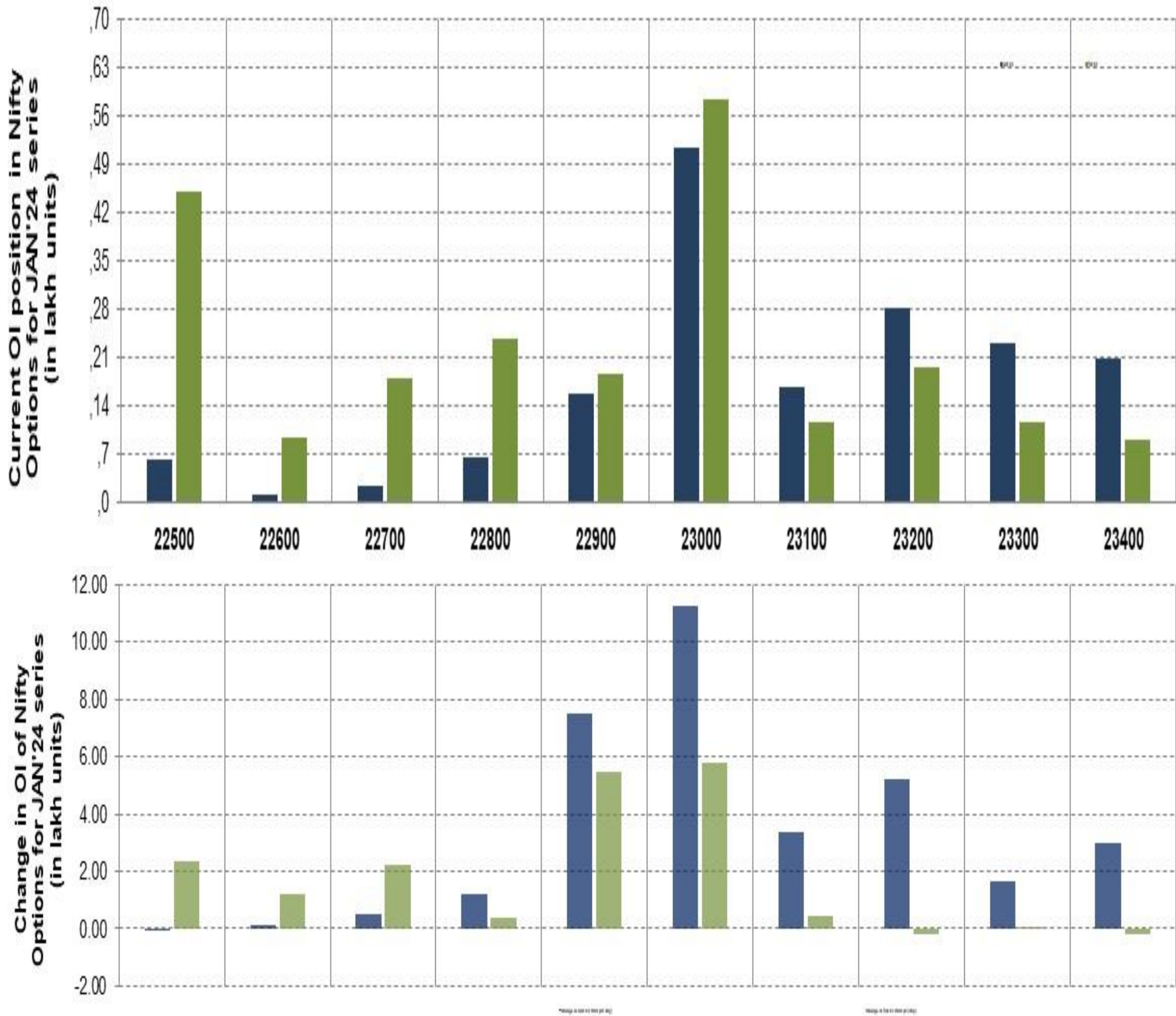
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 1.12 million in Open Interests is **Strike Price of 23000**
- **Most Active Nifty Put** with an addition of 0.58 millions in Open Interests is **Strike Price of 22900**
- **Maximum Open Interest an outstanding** was 5.12 millions for Calls at **Strike Price of 23000**
- **Maximum Open Interest an outstanding** was 5.83 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.