



# MORNING MANTRA



Daily Derivatives & Market Report

FEB 19, 2025



Indian equity benchmarks ended Wednesday's trading session flat with negative bias as investors remained cautious due to U.S. tariff-related uncertainties. After making a negative start, soon markets turned positive as traders were optimistic after a meeting between Russian and U.S. officials raised hopes of an end to the three-year war in Ukraine. Indices erased most of its gains to trade near neutral lines in noon deals pressured by index heavyweights amid mixed global cues.

Some of the important factors in today's trade:

**US Fed FOMC minutes:** Sentiments were down beat ahead of the Federal Open Market Committee (FOMC) minutes for the January policy meeting, which will be released tonight. Market participants are eyeing the FOMC minutes to get cues about the monetary policy outlook.

**FII's turn net buyers on Tuesday:** Traders paid no attentions toward the Foreign Institutional Investors (FIIs) turned buyers on Tuesday after unabated selling. They bought equities worth Rs 4,786.56 crore, according to exchange data.

**India, Qatar to double trade to \$28 billion:** Traders took note of report that India and Qatar have agreed to double bilateral trade to \$28 billion over the next five years and announced elevation of their relationship to the level of strategic partnership as Prime Minister Narendra Modi held talks with Amir Sheikh Tamim Bin Hamad Al-Thani.

**Global front:** Most of the European markets were trading in red, as U.S. President Donald Trump continued his aggressive stance on trade, reiterating that America will charge reciprocal tariff to trading partners which would be 'no more, no less' levied by other countries. Most of the Asian markets ended in mixed, amid lingering tariff concerns and tense Russia-Ukraine negotiations.

# MARKET SELFIE



## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	75939.18	-28.21	-0.04
NIFTY	22932.90	-12.40	-0.05
MIDCAP	40376.68	518.22	1.30
SMLCAP	45455.83	1071.11	2.41
BSEFMC	19047.64	19.48	0.10
HEALTHCARE	40104.14	-123.00	-0.31
AUTO	48785.29	17.74	0.04
POWER	5979.35	74.54	1.26
REALTY	6574.88	105.13	1.62
BSE IT	40029.19	-492.06	-1.21
BANKEX	56461.32	553.73	0.99
OIL GAS	23850.75	163.02	0.69
METAL	28272.84	392.51	1.41
INDIA VIX	15.42	-0.25	-1.60

## ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	2340	638	22
BSE	2809	1149	116

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	4917	4910	0
NSE CASH	84192	84853	(1)
NSE F&O	175821	137067	28

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	20.38	3.41	1.42
SENSEX	21.14	3.91	1.20

# KEY NUMBERS TRACKER



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

FII-DII*	Buy	Sell	Net
DII	11193	9235	1958
FII	11571	13452	(1881)

Note: FPI & DII Figures are provisional

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

FII	Buy	Sell	Net
Index Futures	3789.04	3605.71	183
Index Options	855531.92	853607.79	1924
Stock Futures	24008.19	23283.34	725
Stock Options	93682.00	92429.03	1253

## PUT-CALL RATIO

Index	Current	Previous
NIFTY	0.80	0.83
BANK NIFTY	0.82	0.71

## DOLLAR INDEX

Dollar Index	Current	Previous	% Change
DXY	107.07	107.02	0.05

## 10-YEARS G-SEC YIELD

Country	Current	Previous	% Change
INDIA	6.686	6.692	-0.09
USA	4.562	4.544	0.40

## KEY COMMODITIES TRACKER (in \$)

Commodity	Current	Change Points	% Change
Gold	2944.44	10.54	0.36
Silver	32.96	0.06	0.20
Crude-Oil	72.27	0.42	0.58
Brent-Crude	76.38	0.54	0.71

# 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	22933	22697	22815	22933	23050	23168
SENSEX	75939	75196	75568	75953	76325	76710
NIFTY FUTURES	22965	22759	22862	22984	23087	23209
BANK NIFTY	49570	48510	49040	49334	49864	50158
CNX IT	40924	40419	40672	41038	41290	41656
CNX MIDCAP	50527	48722	49625	50117	51019	51512
CNX SMALLCAP	15526	14758	15142	15360	15745	15963
INDIA VIX	15.42	14.13	14.77	15.40	16.04	16.67

## INDEX TREND ANALYSIS

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

## SECURITIES BAN IN F&O TRADES FOR 20-02-2025

MANAPPURAM

# TECHNICAL VIEWS



## NIFTY

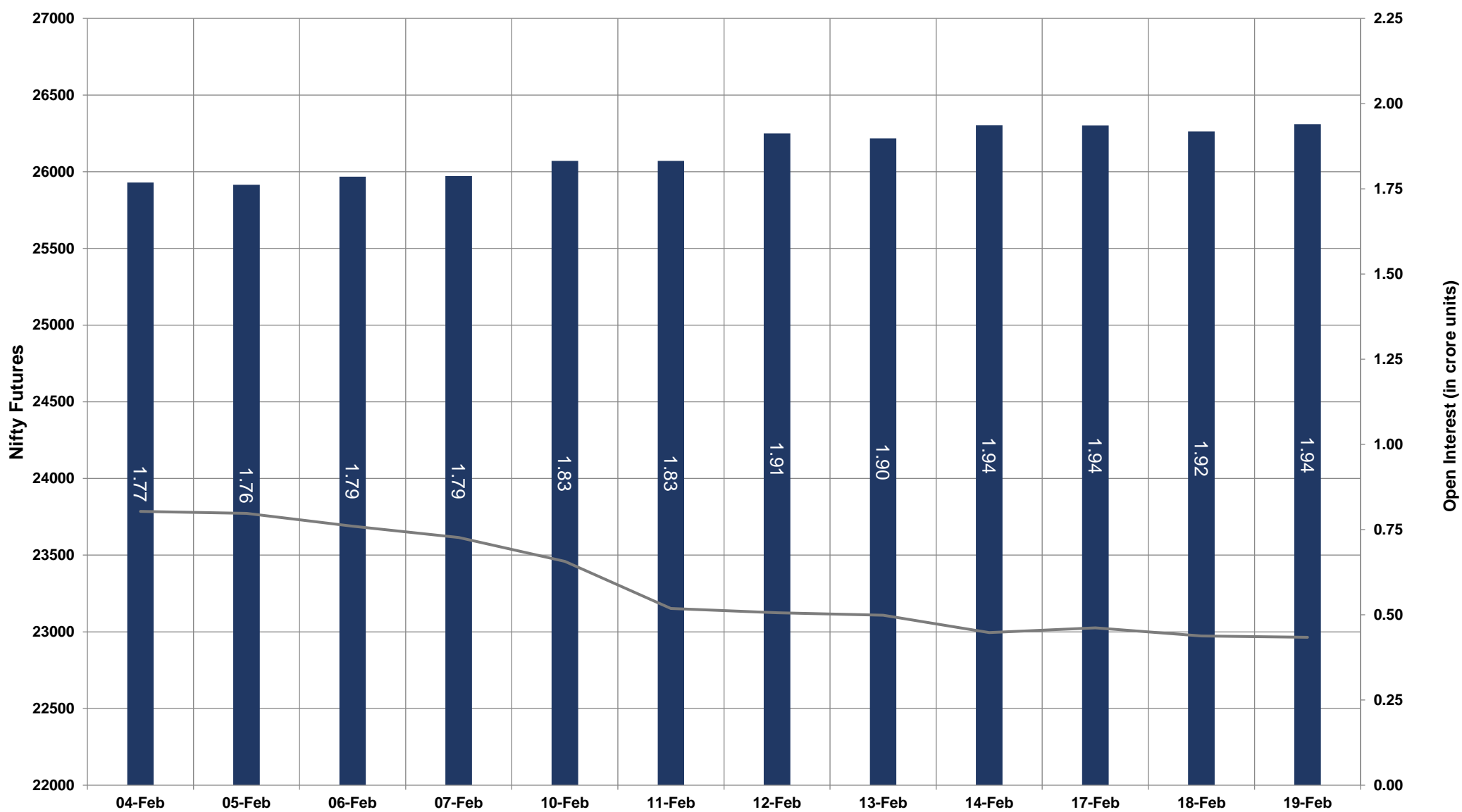


- Nifty Cash = **22932.90 (-0.05%)**
- Resistance levels = **23150** and **23300**
- Support levels = **22800** and **22660**

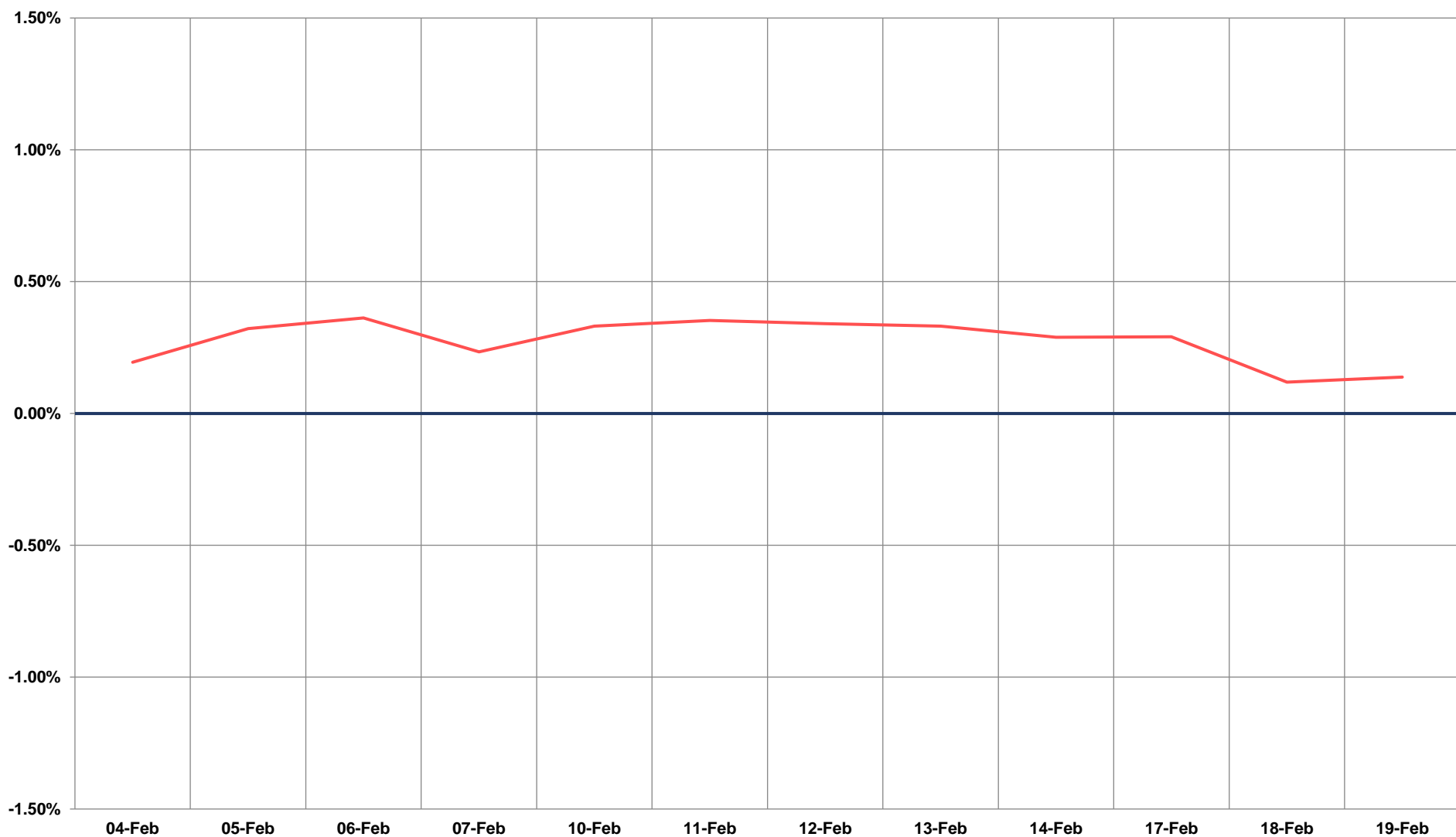
# TECHNICAL VIEWS



## NIFTY FUTURES



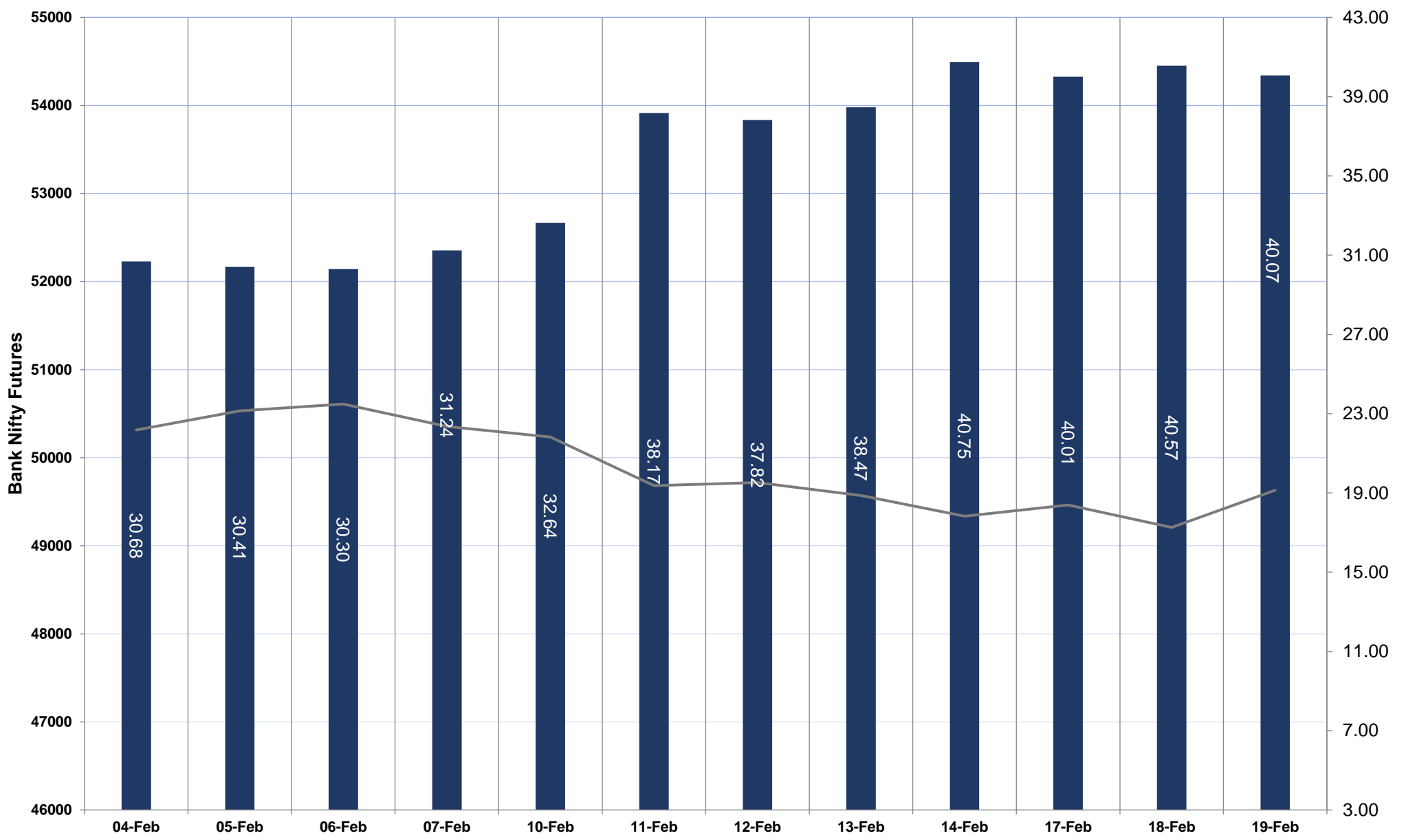
## SPREAD: FUTURE & SPOT



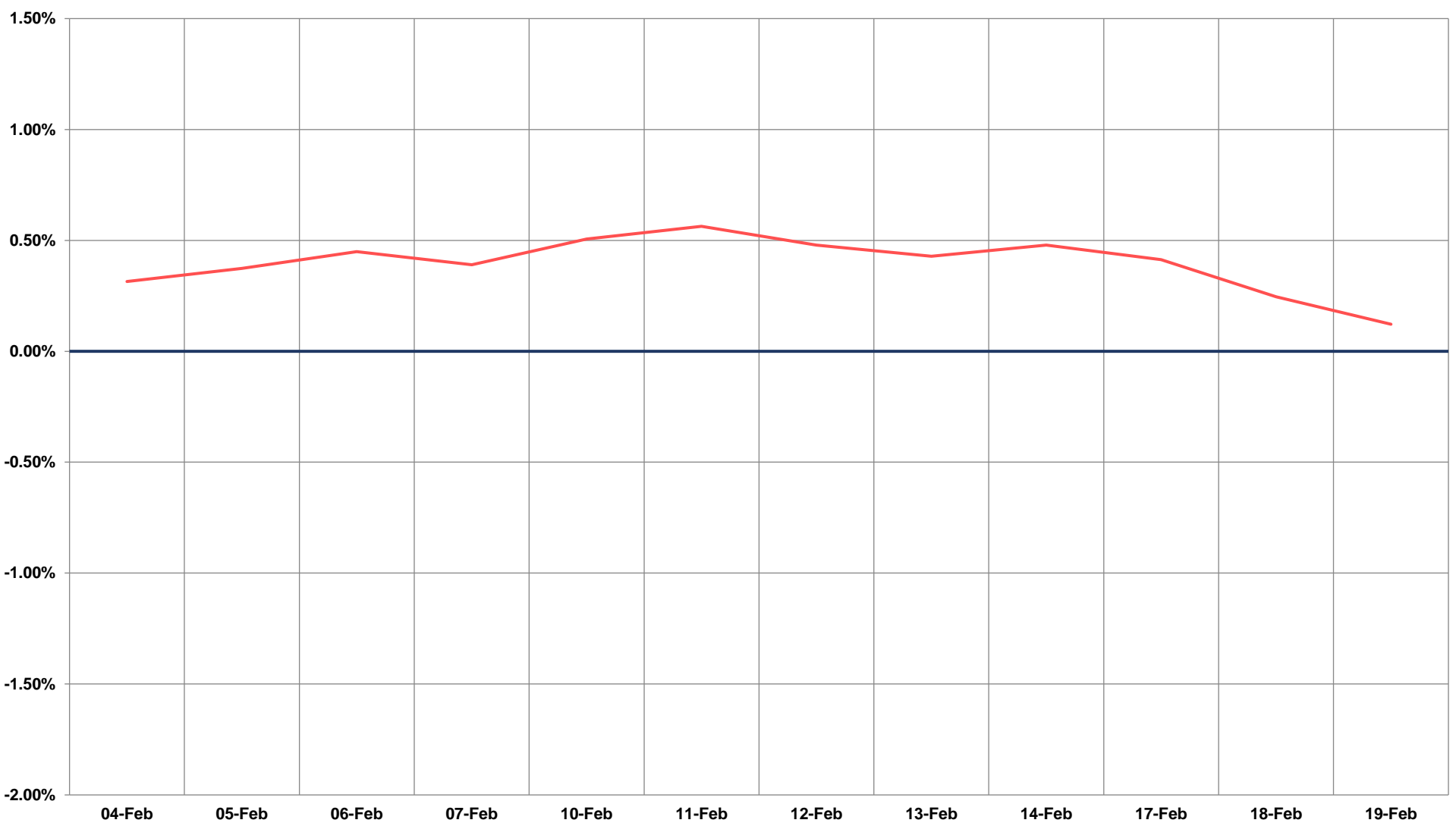
# TECHNICAL VIEWS



## BANK NIFTY FUTURES



## SPREAD: FUTURE & SPOT

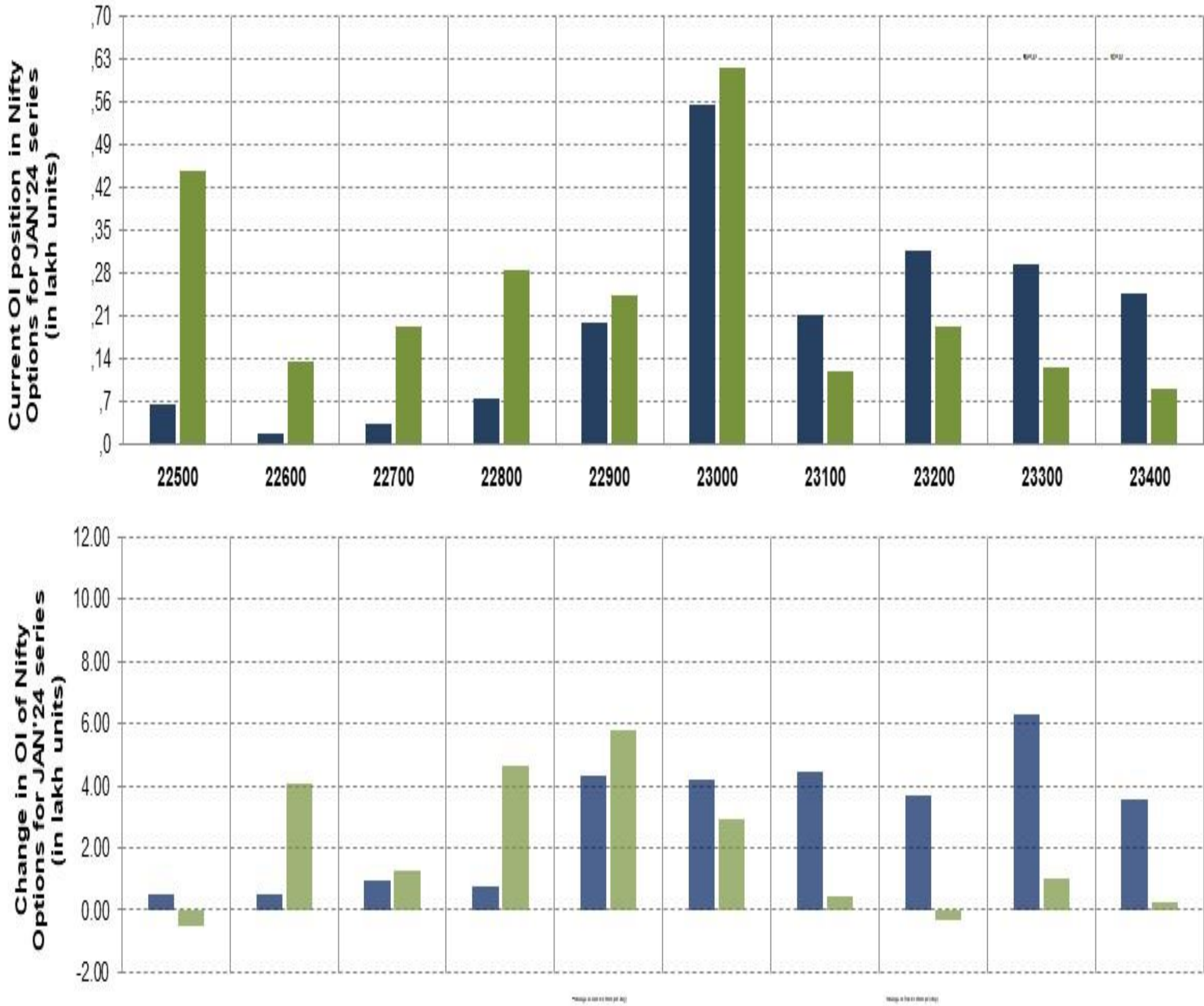




# TECHNICAL VIEWS



## NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.62 million in Open Interests is **Strike Price of 23300**
- **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 5.54 millions for Calls at **Strike Price of 23000**
- **Maximum Open Interest an outstanding** was 6.13 millions for puts at **Strike Price of 23000**

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