



# MORNING MANTRA



Daily Derivatives & Market Report

MAR 10, 2025



Indian stock markets lost their initial gaining momentum to end in red on Monday, amid growing concerns of a potential global trade war. After making a cautious start, soon markets gained momentum as some support came amid a private report stating that the food inflation in India likely fell below 5 per cent for the first time since June 2023. However, the indices slipped into negative territory in second half and remained in red till the end of the day, as sentiments got dampened after foreign institutional investors offloaded equities worth Rs 2,035.10 crore on a net basis on Friday, exchange data showed.

Some of the important factors in today's trade:

**Rupee plunges against US dollar:** Traders were cautious after Indian rupee plunged sharply against the US dollar on Monday as the dollar started recovering from six-month low levels.

**EU's environmental rules hurdle in India-EU trade talks:** Some concern came with the Global Trade Research Initiative's (GTRI) economic think tank stating that the European Union's (EU) aggressive environmental regulations, particularly the carbon tax, deforestation rules, and supply chain due diligence laws are one of the biggest hurdles in the negotiations for a proposed trade pact with India.

**India eyes US trade deal:** Traders took note of Finance Minister Nirmala Sitharaman's statement that India is looking for a good trade agreement with the US to promote economic growth and ensure smooth supply chains.

**Global front:** European markets were trading in red, after a week of high volatility on concerns about an escalating global trade war and its potential impact on global economic growth. Most of the Asian markets ended in red, as lingering tariff worries, the threat of a U.S. recession and signs of deepening deflationary pressures in China.

# MARKET SELFIE



## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	74115.17	-217.41	-0.29
NIFTY	22460.30	-92.20	-0.41
MIDCAP	39306.68	-581.61	-1.46
SMLCAP	44644.98	-961.88	-2.11
BSEFMC	18856.55	19.92	0.11
HEALTHCARE	39189.49	-367.50	-0.93
AUTO	46524.83	-570.75	-1.21
POWER	6127.36	-25.26	-0.41
REALTY	6209.61	-123.03	-1.94
BSE IT	36999.86	-197.05	-0.53
BANKEX	55232.26	-269.09	-0.48
OIL GAS	23313.90	-519.89	-2.18
METAL	29936.36	-287.69	-0.95
INDIA VIX	13.99	0.52	3.86

## ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	835	2196	37
BSE	1127	2963	139

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	4386	4423	(1)
NSE CASH	77908	82305	(5)
NSE F&O	140266	137977	2

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	19.96	3.34	1.43
SENSEX	20.63	3.81	1.23

# KEY NUMBERS TRACKER



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

FII-DII*	Buy	Sell	Net
DII	9591	9328	264
FII	9925	10410	(485)

Note: FPI & DII Figures are provisional

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

FII	Buy	Sell	Net
Index Futures	2773.06	3050.70	(278)
Index Options	722965.79	707223.69	15742
Stock Futures	13862.86	15505.36	(1643)
Stock Options	49543.17	49795.99	(253)

## PUT-CALL RATIO

Index	Current	Previous
NIFTY	0.91	1.08
BANK NIFTY	0.93	0.99

## DOLLAR INDEX

Dollar Index	Current	Previous	% Change
DXY	103.81	103.77	0.37

## 10-YEARS G-SEC YIELD

Country	Current	Previous	% Change
INDIA	6.701	6.668	0.19
USA	4.216	4.318	-2.41

## KEY COMMODITIES TRACKER (in \$)

Commodity	Current	Change Points	% Change
Gold	2906.90	1.08	0.04
Silver	32.24	-0.22	-0.68
Crude-Oil	66.41	-0.63	-0.94
Brent-Crude	69.68	-0.66	-0.94

# CURRENCY FUTURES & INDEX TRENDS TRACKER



## CURRENCY FUTURES

Expiry	Close	Change Points	% Change
26 MAR-25 USD-INR	87.40	0.34	0.39
26 MAR-25 EUR-INR	94.90	0.39	0.41
26 MAR-25 GBP-INR	112.94	0.58	0.51
26 MAR-25 JPY- INR	59.40	0.28	0.47

## INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS

Index	Close	S2	S1	Pivot	R1	R2
NIFTY	22460	22274	22367	22522	22615	22770
SENSEX	74115	73574	73845	74293	74564	75012
NIFTY FUTURES	22516	22336	22426	22577	22667	22818
BANK NIFTY	48217	47839	48028	48314	48502	48788
CNX IT	37644	37276	37460	37749	37933	38222
CNX MIDCAP	48440	47494	47967	48754	49227	50014
CNX SMALLCAP	15198	14799	14999	15331	15531	15863
INDIA VIX	13.98	13.15	13.56	13.89	14.30	14.63

## INDEX TREND ANALYSIS

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

## SECURITIES BAN IN F&O TRADES FOR 07-03-2025

BSE, HINDCOPPER, MANAPPURAM

# TECHNICAL VIEWS



## NIFTY

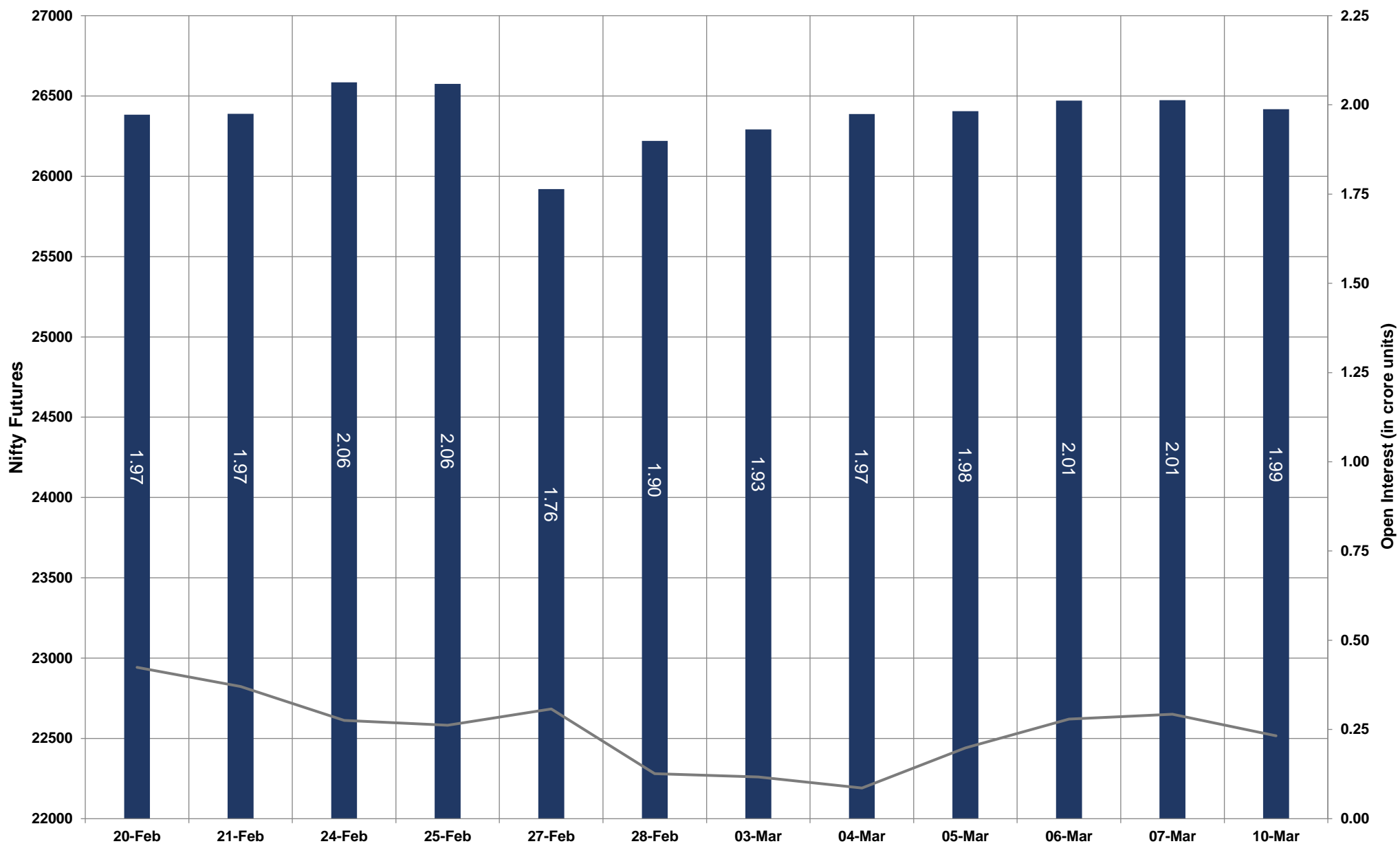


- Nifty Cash = **22460.30 (-0.41%)**
- Resistance levels = **22670** and **22750**
- Support levels = **22350** and **22200**

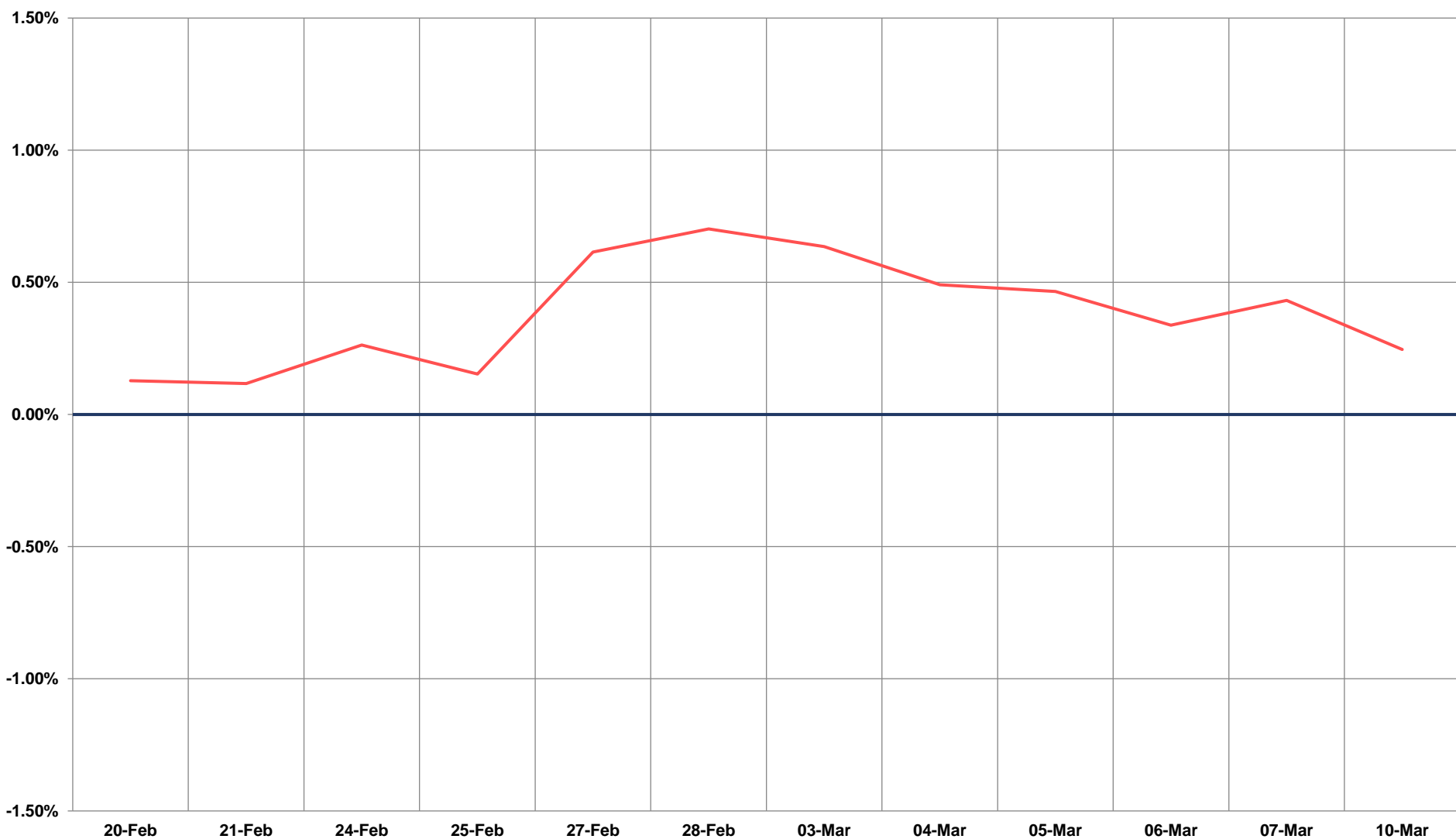
# TECHNICAL VIEWS



## NIFTY FUTURES



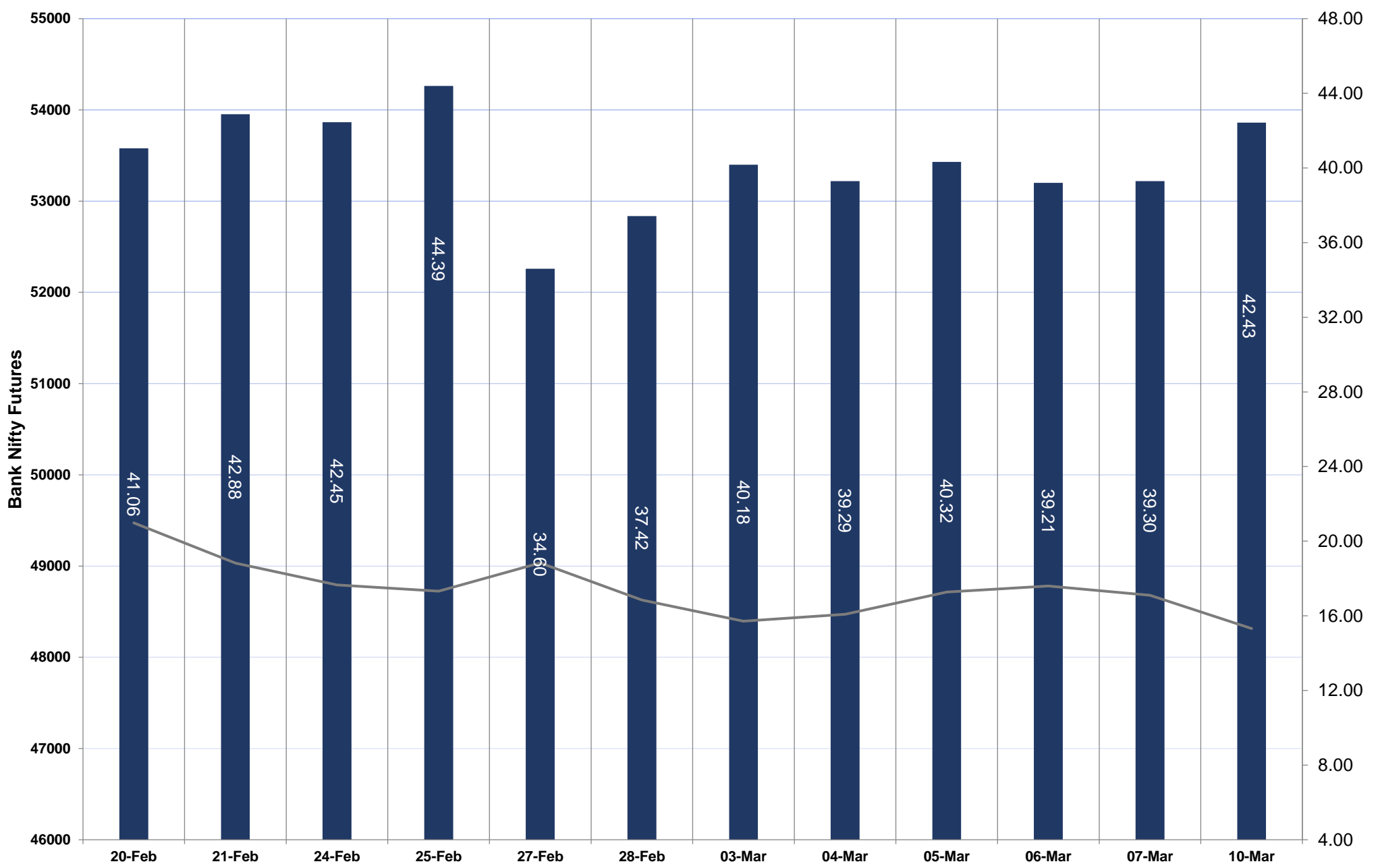
## SPREAD: FUTURE & SPOT



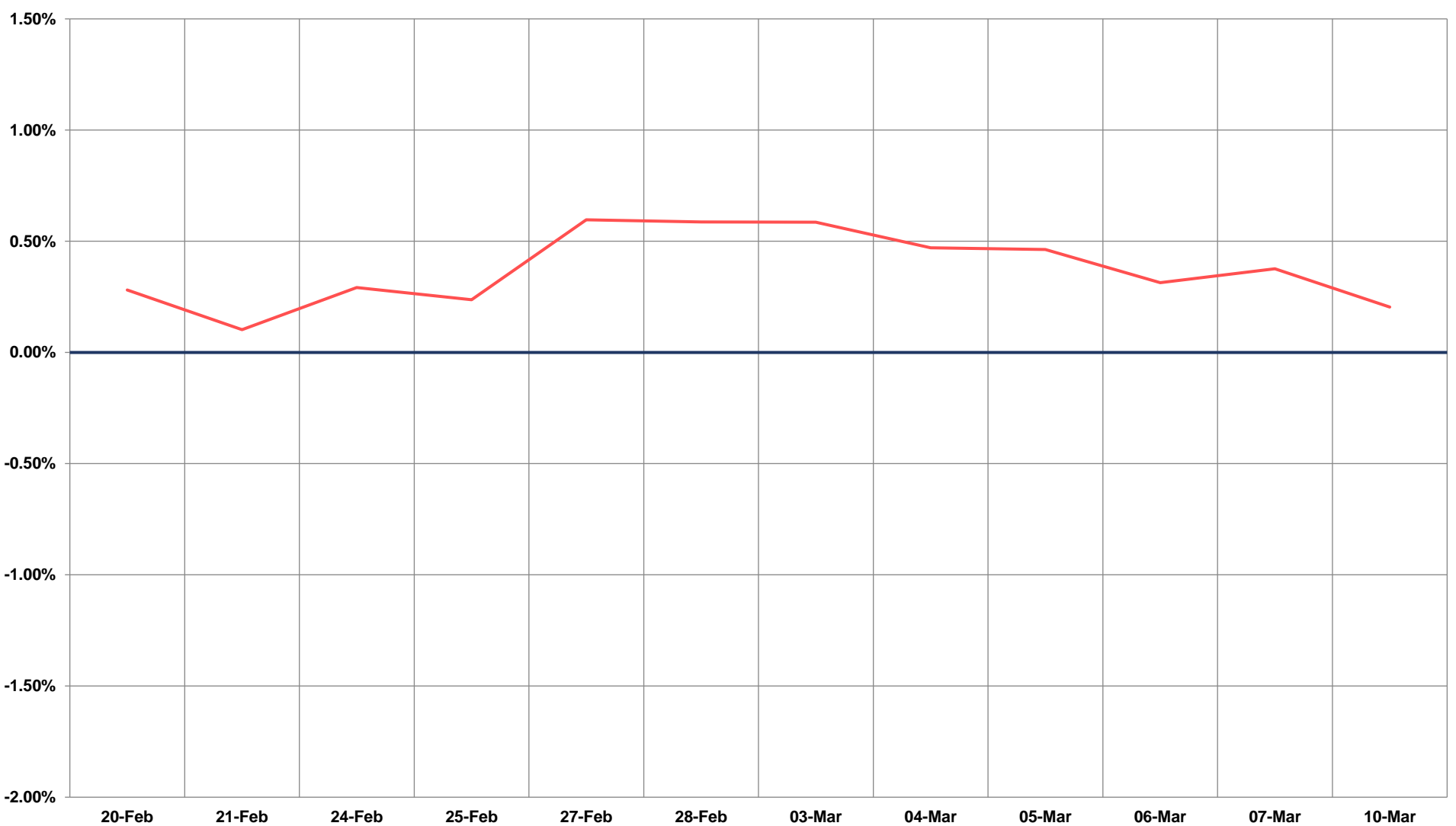
# TECHNICAL VIEWS



## BANK NIFTY FUTURES



## SPREAD: FUTURE & SPOT

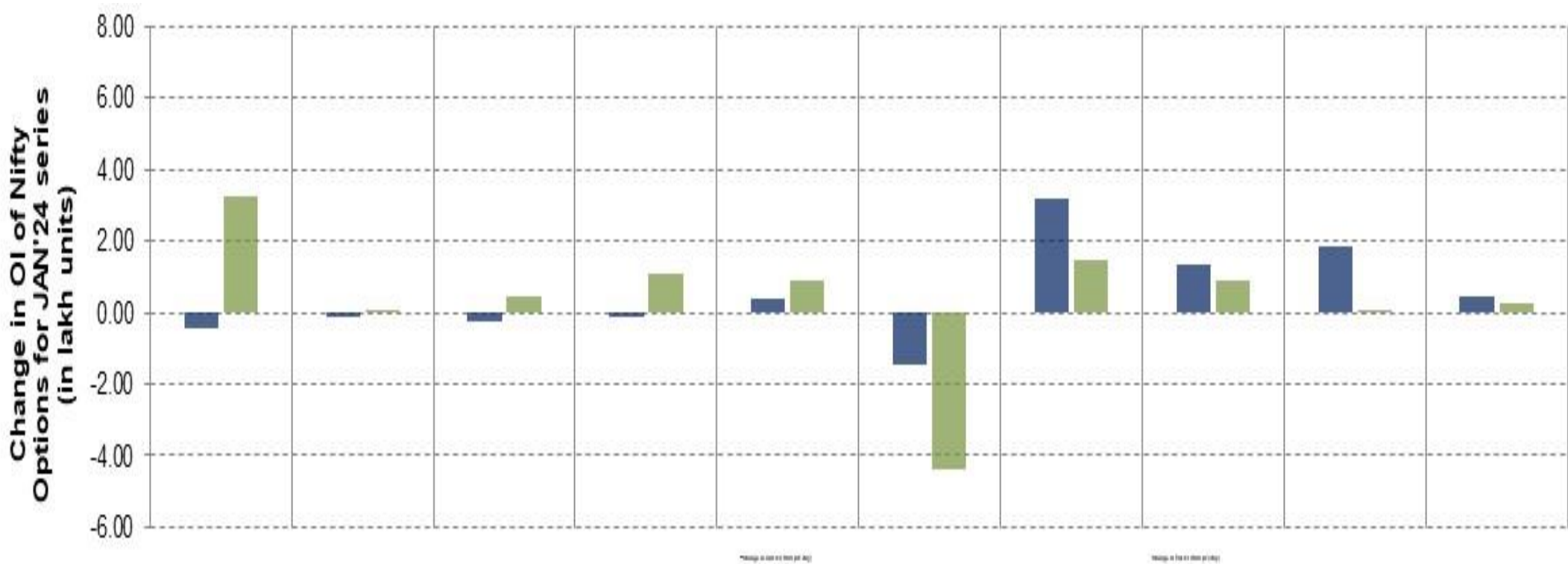
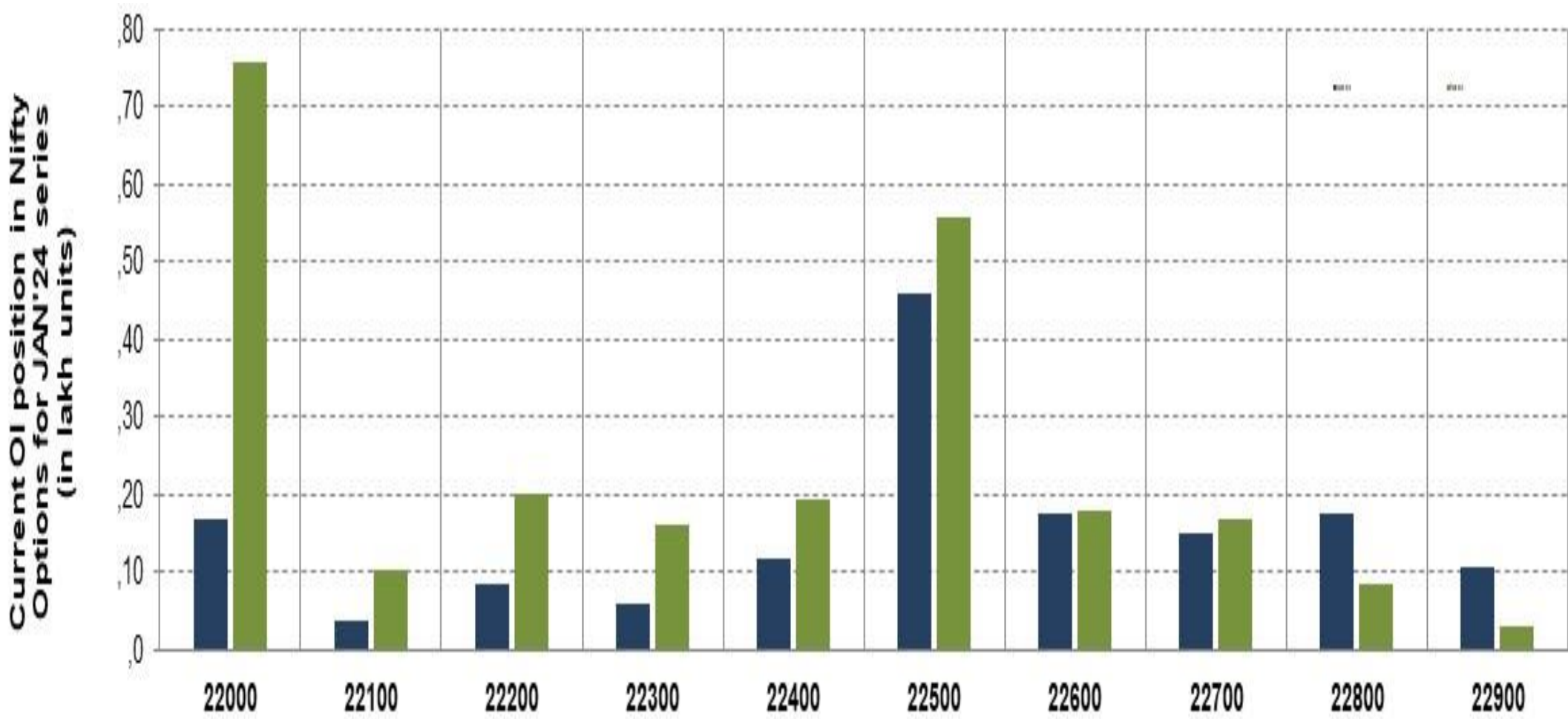




# TECHNICAL VIEWS



## NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.31 million in Open Interests is **Strike Price of 22600**
- **Most Active Nifty Put** with an addition of 0.32 millions in Open Interests is **Strike Price of 22000**
- **Maximum Open Interest an outstanding** was 4.57 millions for Calls at **Strike Price of 22500**
- **Maximum Open Interest an outstanding** was 7.55 millions for puts at **Strike Price of 22000**

# 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.