



# MORNING MANTRA



Daily Derivatives & Market Report

MAR 18, 2025



Indian equity markets ended near the day's high points on Tuesday, with gains supported by strong performances in key sectors such as realty and industrials. Indices made a positive start and continued their firm trade throughout the session, as traders took note of Organization for Economic Co-operation and Development (OECD) report stating that India to remain the fastest-growing major economy over the next two years with the GDP growth rate projected at 6.4 per cent for 2025 and at 6.6 per cent in 2026.

Some of the important factors in today's trade:

**India's trade deficit narrows in February:** Some support came with Commerce Ministry data showing that India's trade deficit in February narrowed to \$14.05 billion as the country's imports reduced to \$50.96 billion in February.

**Govt sees 13% jump in net direct tax collection:** Some support also came as the government data showed that net direct tax collection grew 13.13 per cent to over Rs 21.26 lakh crore so far (till March 16, 2025) this fiscal aided by higher advance tax mop up.

**India's OFDI commitments surge 40% in February 2025:** Sentiments remained positive as the Reserve Bank of India (RBI) report showed that India's outward foreign direct investment (OFDI) commitments surged 39.63% to \$5,359.79 million in February 2025 as against \$3,838.62 million in February 2024, driven by strong growth in equity investments

**Global front:** European markets were trading in green, with an upcoming German vote on historic debt reforms and Ukraine peace talks in focus. Most of the Asian markets ended in green after Indonesia's foreign trade surplus increased notably in February from a year ago as exports grew faster than imports.

# MARKET SELFIE



## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	75301.26	1131.30	1.53
NIFTY	22834.30	325.55	1.45
MIDCAP	40189.53	825.45	2.10
SMLCAP	45031.45	1197.18	2.73
BSEFMC	19051.07	270.38	1.44
HEALTHCARE	40476.75	742.84	1.87
AUTO	47744.88	1126.35	2.42
POWER	6317.82	139.98	2.27
REALTY	6388.33	182.99	2.95
BSE IT	35926.85	498.24	1.41
BANKEX	56809.83	1103.02	1.98
OIL GAS	23885.30	208.58	0.88
METAL	30591.15	575.66	1.92
INDIA VIX	13.21	-0.21	-1.56

## ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	2509	517	45
BSE	2826	1208	125

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	6227	4423	41
NSE CASH	89219	75425	18
NSE F&O	154689	121748	27

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	20.30	3.40	1.41
SENSEX	20.96	3.87	1.21

# KEY NUMBERS TRACKER



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

FII-DII*	Buy	Sell	Net
DII	12333	9798	2535
FII	15710	15015	695

Note: FPI & DII Figures are provisional

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

FII	Buy	Sell	Net
Index Futures	7575.79	2814.43	4761
Index Options	842567.23	856486.51	(13919)
Stock Futures	19798.80	16496.78	3302
Stock Options	62589.80	61771.28	819

## PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.29	1.04
BANK NIFTY	1.19	1.03

## DOLLAR INDEX

Dollar Index	Current	Previous	% Change
DXY	103.27	103.40	-0.13

## 10-YEARS G-SEC YIELD

Country	Current	Previous	% Change
INDIA	6.672	6.689	-0.25
USA	4.322	4.306	0.37

## KEY COMMODITIES TRACKER (in \$)

Commodity	Current	Change Points	% Change
Gold	3023.15	23.51	0.78
Silver	34.07	0.33	0.98
Crude-Oil	68.51	0.93	1.38
Brent-Crude	72.04	0.97	1.36

# CURRENCY FUTURES & INDEX TRENDS TRACKER



## CURRENCY FUTURES

Expiry	Close	Change Points	% Change
26 MAR-25 USD-INR	86.63	-0.23	-0.27
26 MAR-25 EUR-INR	94.70	-0.11	-0.11
26 MAR-25 GBP-INR	112.45	-0.16	-0.14
26 MAR-25 JPY- INR	57.80	-0.52	-0.89

## INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS

Index	Close	S2	S1	Pivot	R1	R2
NIFTY	22834	22505	22670	22764	22928	23022
SENSEX	75301	74150	74726	75056	75631	75961
NIFTY FUTURES	22895	22587	22741	22827	22981	23067
BANK NIFTY	49315	48344	48829	49115	49600	49886
CNX IT	36619	35764	36192	36436	36864	37109
CNX MIDCAP	49517	48284	48901	49240	49857	50196
CNX SMALLCAP	15375	14930	15152	15272	15494	15613
INDIA VIX	13.21	10.42	11.82	12.73	14.13	15.04

## INDEX TREND ANALYSIS

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

## SECURITIES BAN IN F&O TRADES FOR 19-03-2025

BSE, HINDCOPPER, INDUSINDBK, MANAPPURAM, SAIL

# TECHNICAL VIEWS



## NIFTY

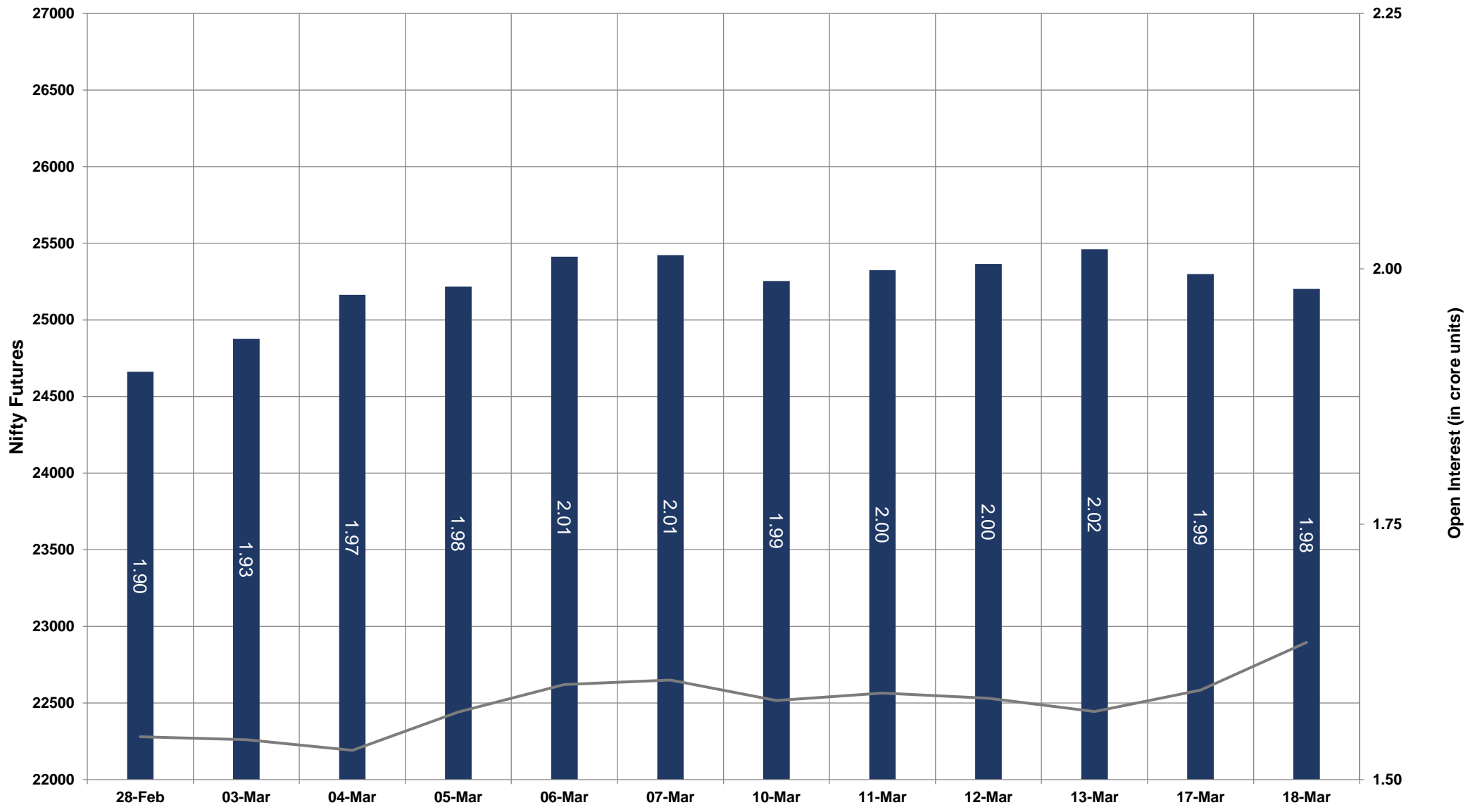


- Nifty Cash = **22834.30 (1.45%)**
- Resistance levels = **22950** and **23050**
- Support levels = **22600** and **22480**

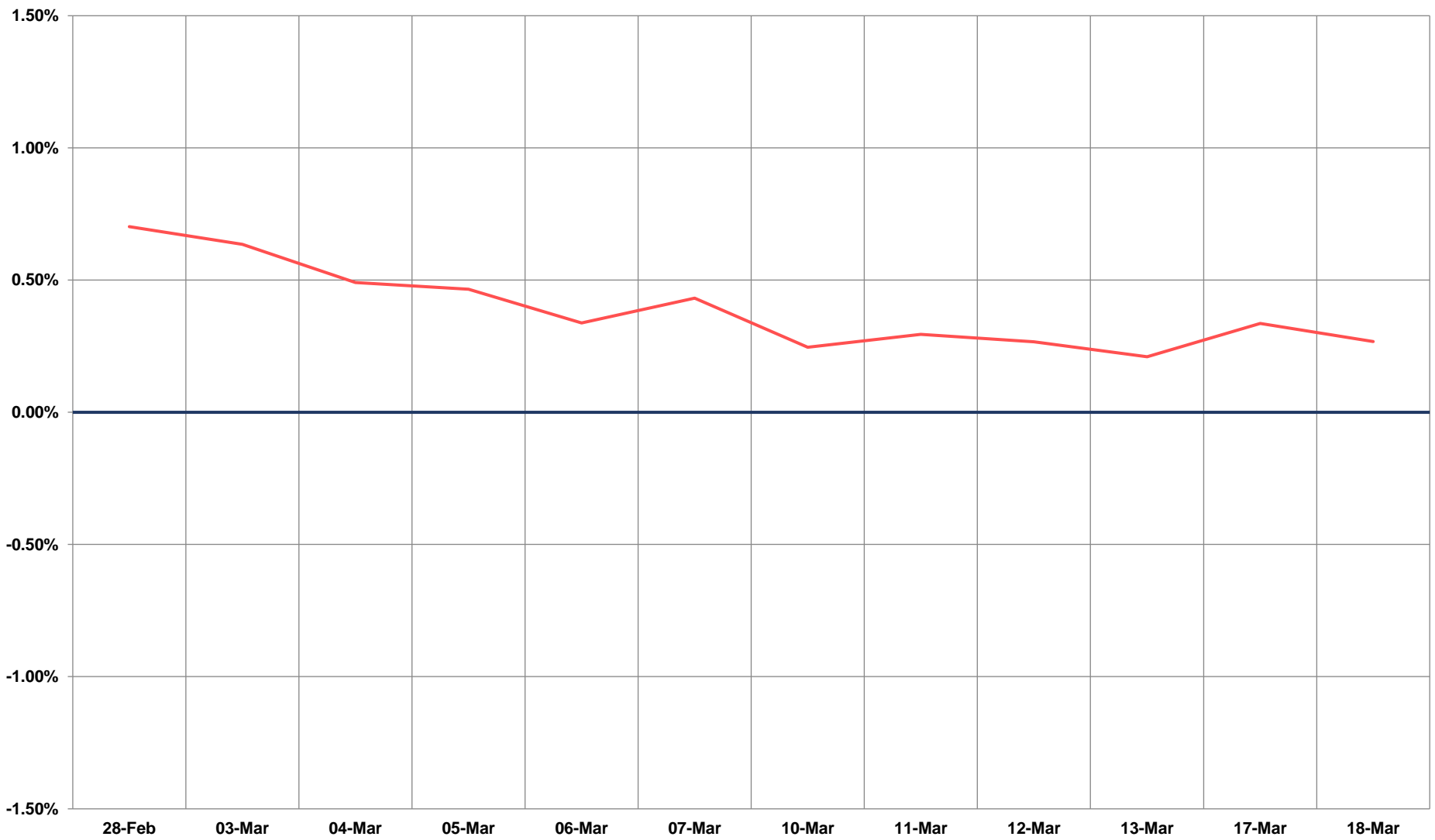
# TECHNICAL VIEWS



## NIFTY FUTURES



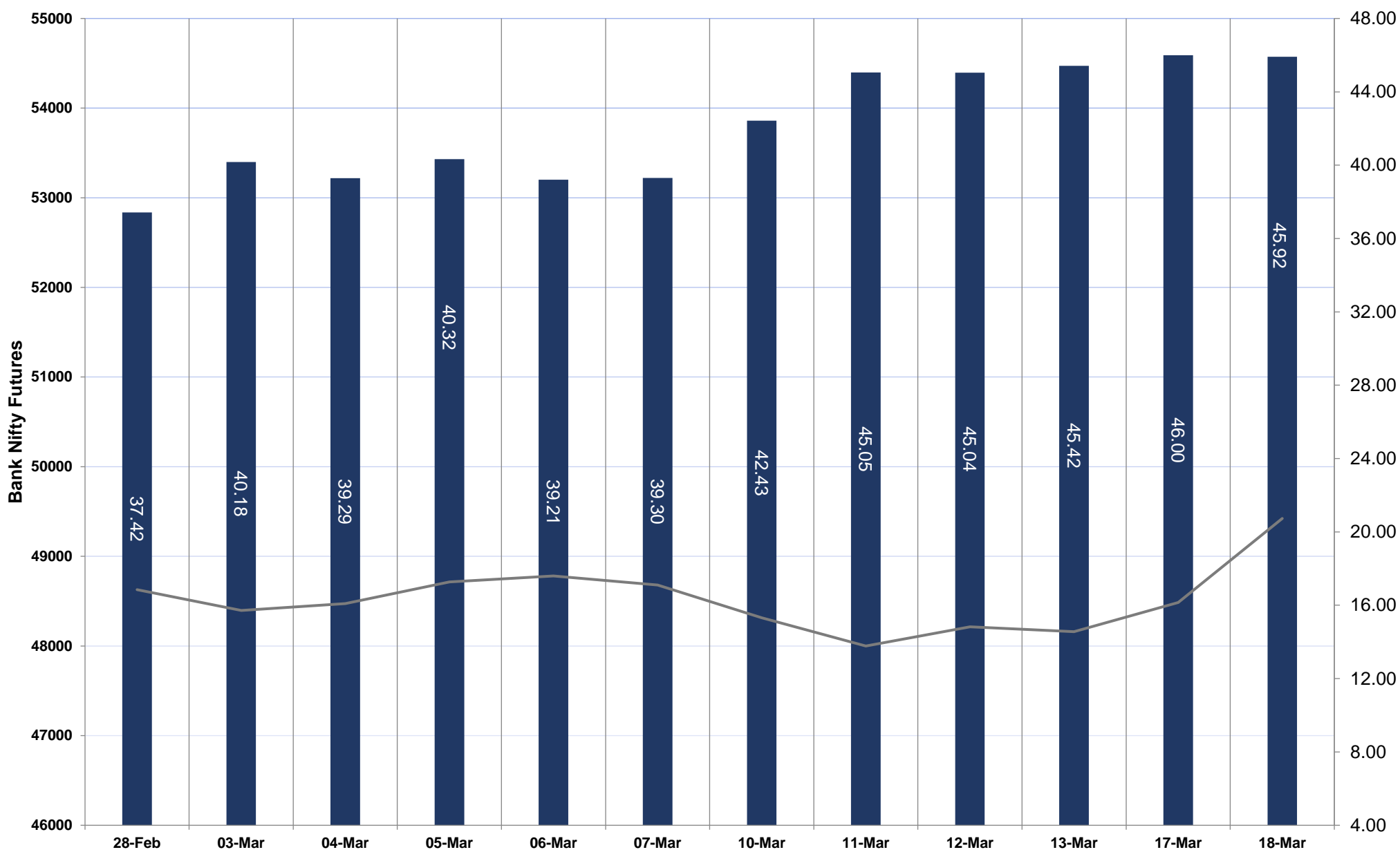
## SPREAD: FUTURE & SPOT



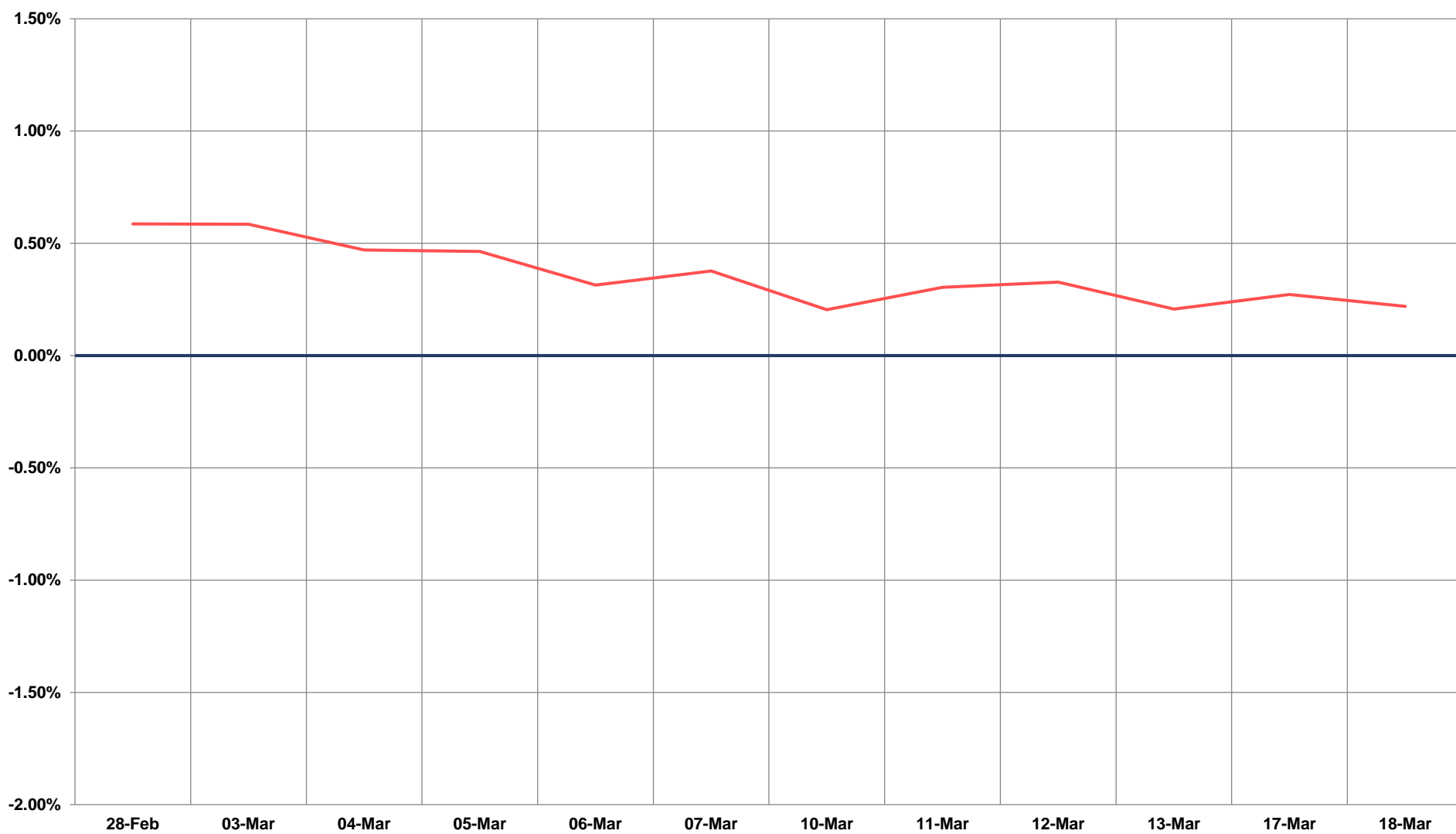
# TECHNICAL VIEWS



## BANK NIFTY FUTURES



## SPREAD: FUTURE & SPOT

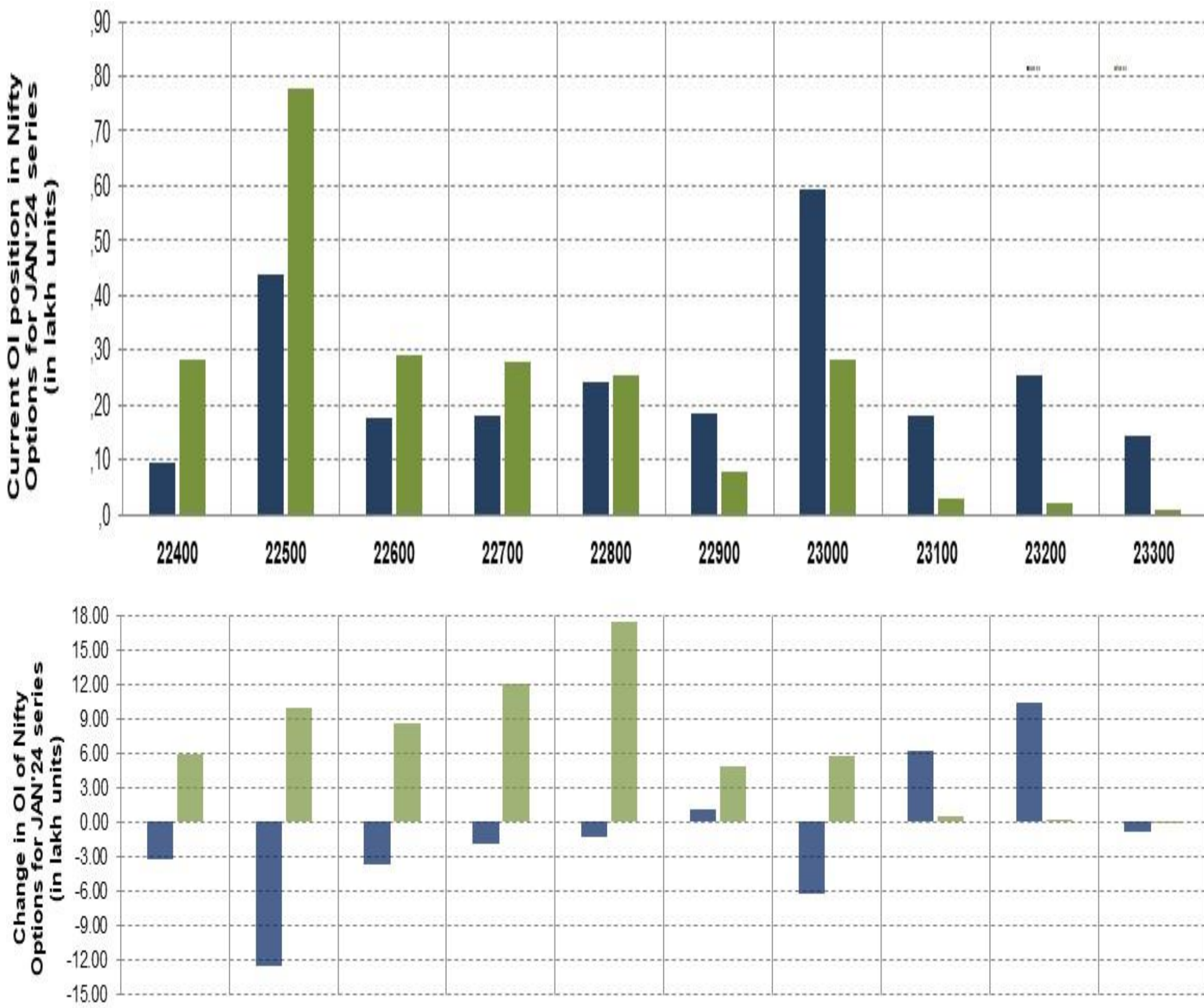




# TECHNICAL VIEWS



## NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 1.03 million in Open Interests is **Strike Price of 23200**
- **Most Active Nifty Put** with an addition of 1.74 millions in Open Interests is **Strike Price of 22800**
- **Maximum Open Interest an outstanding** was 5.95 millions for Calls at **Strike Price of 23000**
- **Maximum Open Interest an outstanding** was 7.79 millions for puts at **Strike Price of 22500**

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