



MORNING MANTRA



Daily Derivatives & Market Report

APR 11, 2025



Indian equity markets rebounded strongly on Friday, with the Nifty crossing the 22,800 mark and the Sensex surging over 1,300 points after the US announced suspension of additional tariffs on India for 90 days until July 9 this year. Indices made a gap-opening and traded near their highest points throughout the trading session despite persistent global trade uncertainties.

Some of the important factors in trade:

Trump pauses new tariffs for 90 days: Sentiments remained optimistic after U.S. President Donald Trump announced a tariff U-turn, dropping the new reciprocal tariff rates on imports from most countries for 90 days.

India's exports cross \$820 billion in 2024-25: Some support came as commerce ministry said that the country's goods and services exports have crossed \$820 billion in 2024-25, marking a nearly 6 per cent increase over the previous fiscal year despite global economic uncertainties.

US tariffs on China to benefit Indian exports: Traders took support with the Global Trade Research Initiative (GTRI) stated that imposition of steep 125 per cent tariffs on China by the US could help Indian products from sectors such as textiles, leather, engineering, and electronics become more competitive in America.

Global front: European markets were trading mostly in red as investors are worried that the escalating trade tensions between the U.S. and China could significantly impede global economic growth. Asian markets ended in mixed as Malaysia's industrial output expanded at the slowest pace in the current sequence of growth that began in January 2024, and retail sales growth eased notably in February.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	75157.26	1310.11	1.77
NIFTY	22828.55	429.40	1.92
MIDCAP	40274.24	727.70	1.84
SMLCAP	45798.35	1352.28	3.04
BSEFMC	20165.66	217.76	1.09
HEALTHCARE	40398.88	836.36	2.11
AUTO	46055.85	910.81	2.02
POWER	6514.17	167.29	2.64
REALTY	6118.39	79.40	1.31
BSE IT	32299.26	276.86	0.86
BANKEX	58402.36	914.61	1.59
OIL GAS	24535.43	466.98	1.94
METAL	27758.16	1140.97	4.29
INDIA VIX	20.11	-1.32	-6.16

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	2566	364	35
BSE	3084	885	110

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	5309	3605	47
NSE CASH	94850	80977	17
NSE F&O	176656	162109	9

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	20.36	3.31	1.38
SENSEX	20.58	3.80	1.24

KEY NUMBERS TRACKER



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

FII-DII*	Buy	Sell	Net
DII	14129	10370	3759
FII	18059	20578	(2519)

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	5792.20	3374.04	2418
Index Options	983354.55	949709.56	33645
Stock Futures	21720.35	16609.69	5111
Stock Options	64917.33	65354.65	(437)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	0.96	0.90
BANK NIFTY	0.89	0.78

DOLLAR INDEX

Dollar Index	Current	Previous	% Change
DXY	99.73	100.91	-1.15

10-YEARS G-SEC YIELD

Country	Current	Previous	% Change
INDIA	6.444	6.444	0.00
USA	4.442	4.392	1.14

KEY COMMODITIES TRACKER (in \$)

Commodity	Current	Change Points	% Change
Gold	3226.50	38.20	1.20
Silver	31.40	0.27	0.86
Crude-Oil	60.26	0.19	0.32
Brent-Crude	63.51	0.20	0.32

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES

Expiry	Close	Change Points	% Change
28 APR-25 USD-INR	86.19	-0.65	-0.74
28 APR-25 EUR-INR	97.89	1.98	2.06
28 APR-25 GBP-INR	112.85	1.61	1.45
28 APR-25 JPY- INR	60.45	0.34	0.56

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS

Index	Close	S2	S1	Pivot	R1	R2
NIFTY	22829	22587	22708	22816	22937	23044
SENSEX	75157	74425	74791	75129	75495	75834
NIFTY FUTURES	22918	22623	22770	22894	23041	23165
BANK NIFTY	51002	50350	50676	50960	51287	51571
CNX IT	32741	32141	32441	32826	33126	33511
CNX MIDCAP	50502	49857	50179	50411	50733	50964
CNX SMALLCAP	15696	15367	15531	15622	15786	15877
INDIA VIX	20.11	17.56	18.84	20.13	21.41	22.70

INDEX TREND ANALYSIS

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

SECURITIES BAN IN F&O TRADES FOR 15-04-2025

BSOFT, HINDCOPPER, MANAPPURAM, NATIONALUM

TECHNICAL VIEWS



NIFTY

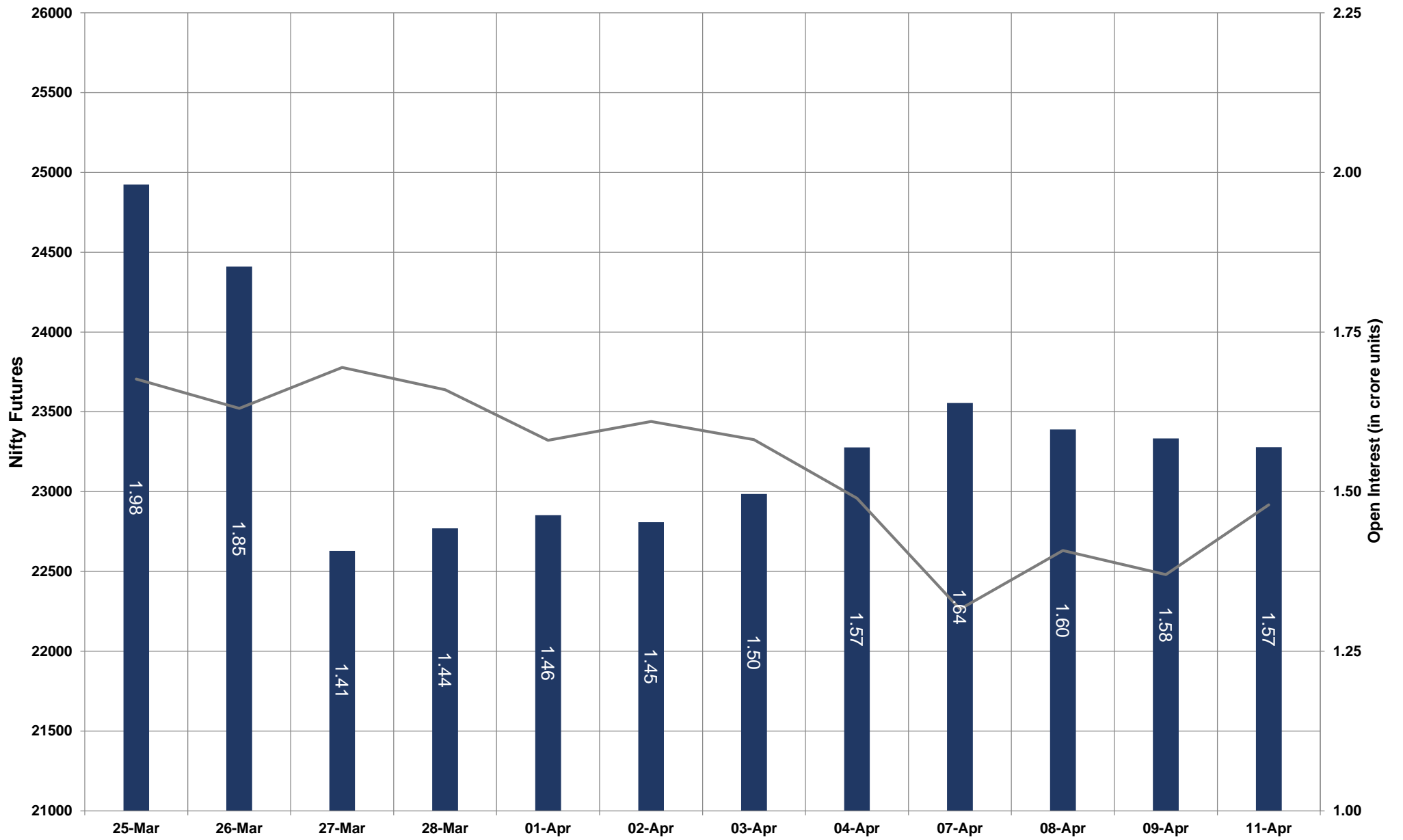


- Nifty Cash = **22828.55 (1.92%)**
- Resistance levels = **23050** and **23200**
- Support levels = **22550** and **22330**

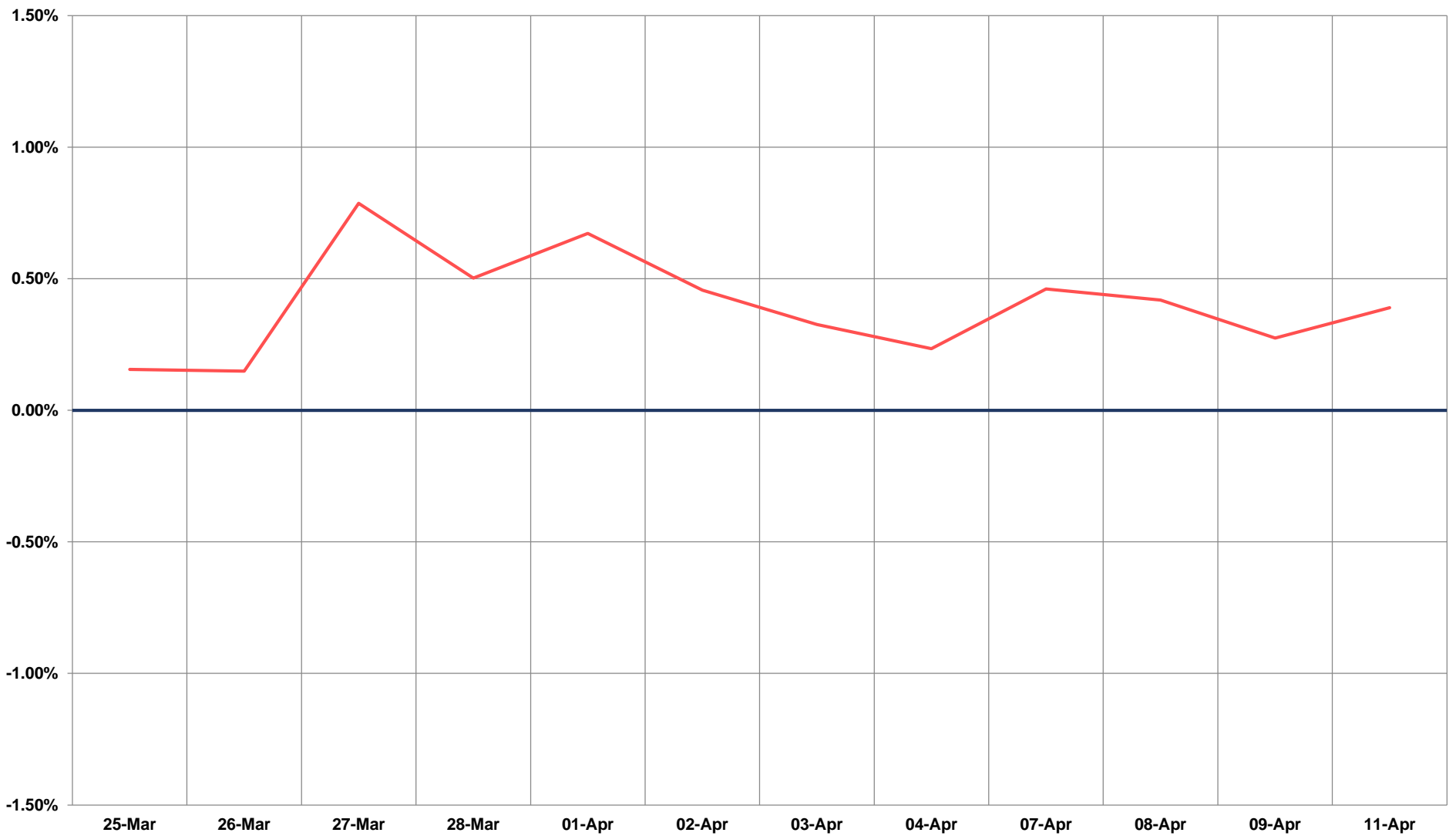
TECHNICAL VIEWS



NIFTY FUTURES



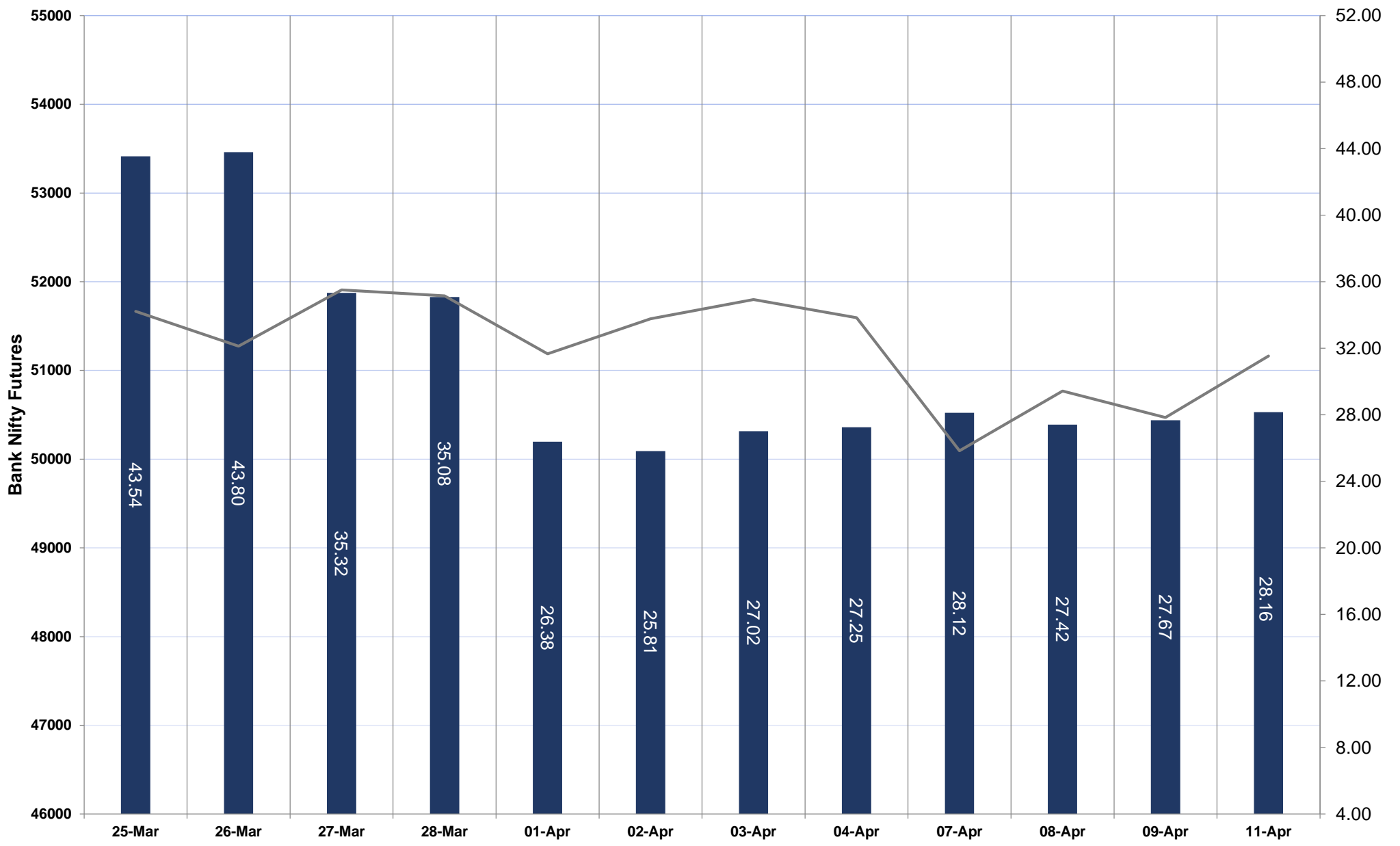
SPREAD: FUTURE & SPOT



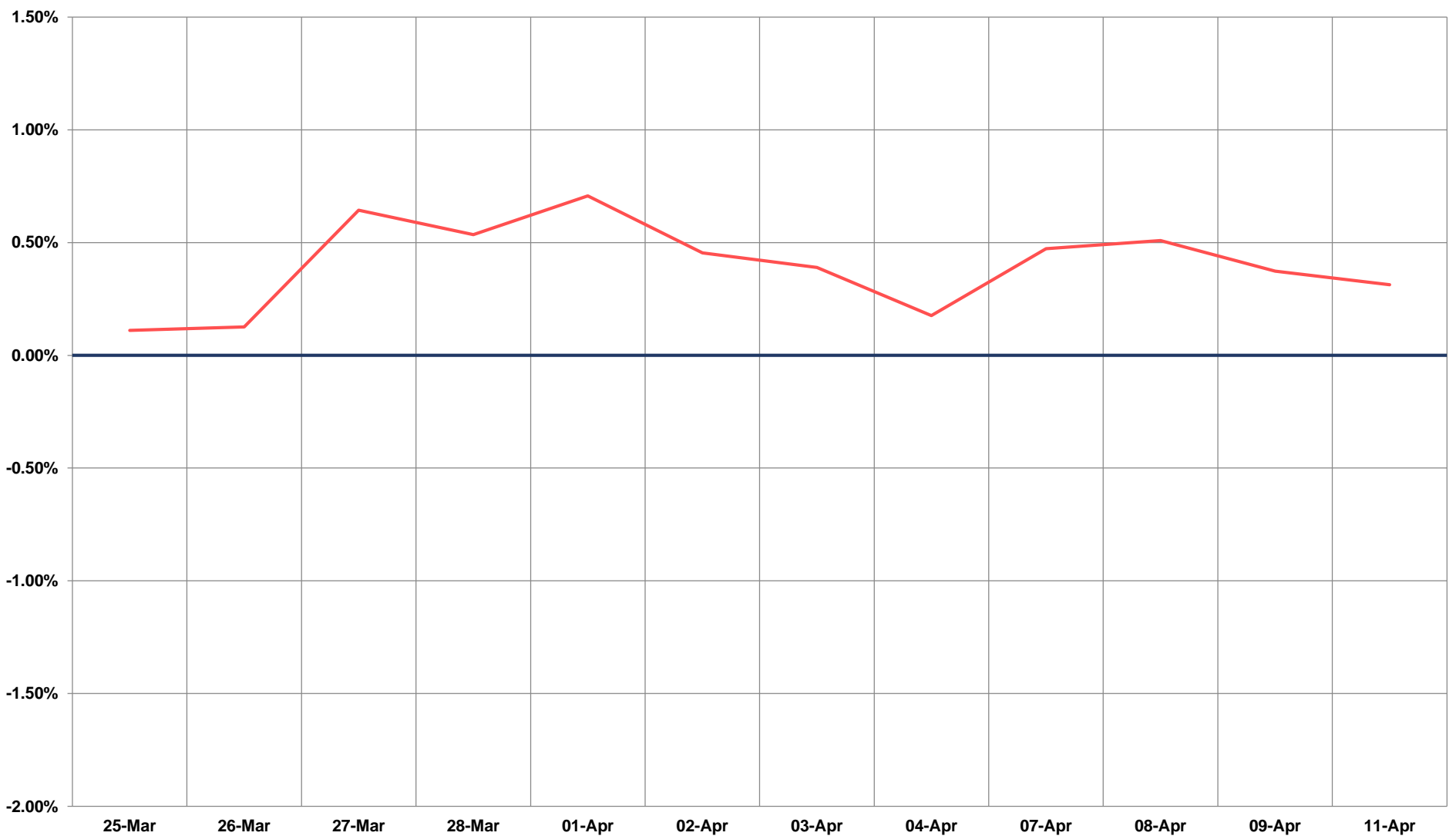
TECHNICAL VIEWS



BANK NIFTY FUTURES



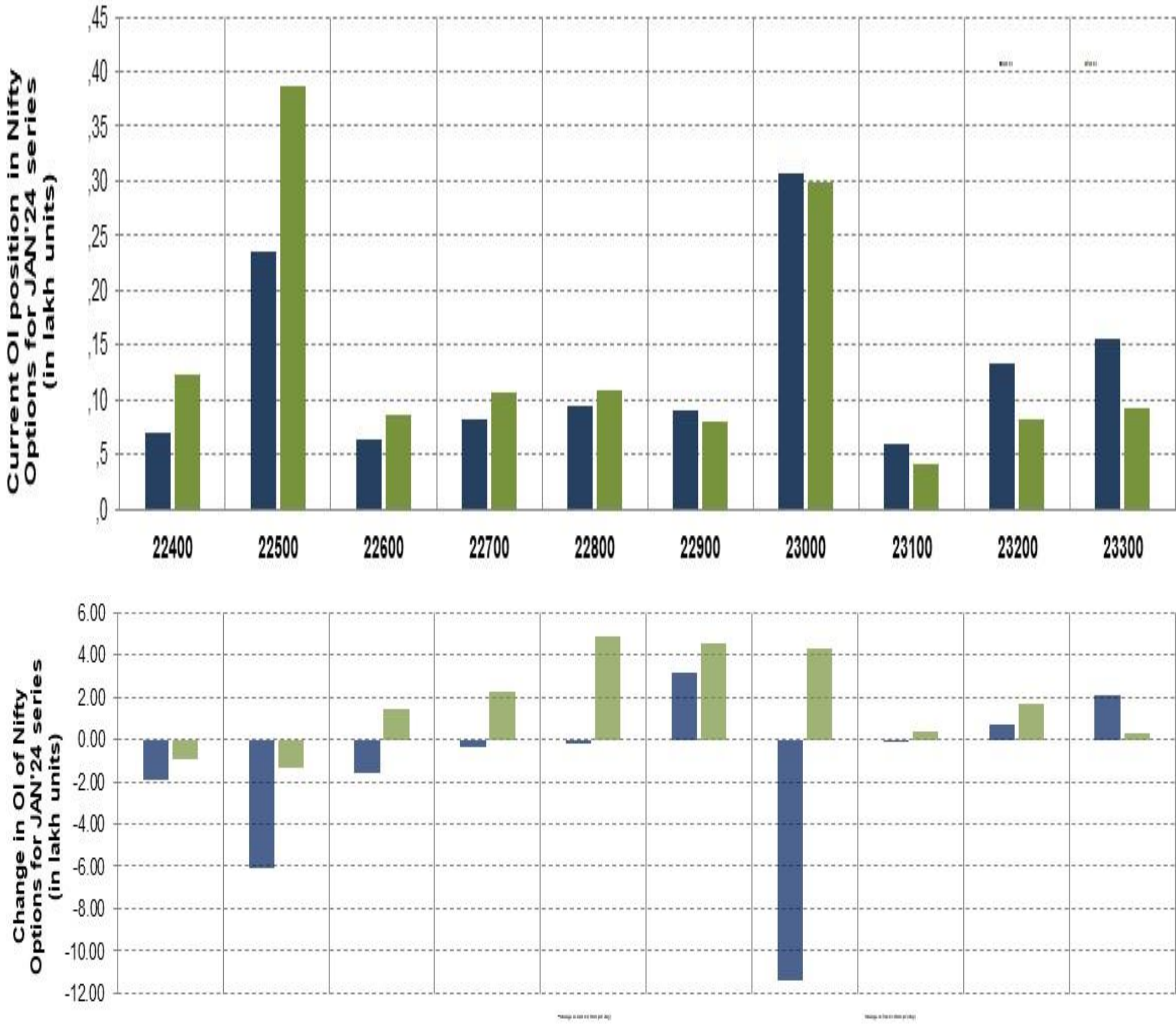
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.31 million in Open Interests is **Strike Price of 22900**
- **Most Active Nifty Put** with an addition of 0.48 millions in Open Interests is **Strike Price of 22800**
- **Maximum Open Interest an outstanding** was 3.06 millions for Calls at **Strike Price of 23000**
- **Maximum Open Interest an outstanding** was 3.86 millions for puts at **Strike Price of 22500**

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