



MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

June 11, 2025



Indian equity benchmarks closed higher on Wednesday amid positive cues from Asian markets. After making a positive start, indices soon gained momentum and touched intraday highs, amid easing trade war tensions after top U.S. and Chinese officials agreed upon a 'framework' to move forward on trade, following two days of high-level talks in London. Some support also came with foreign institutional investors (FIIs) purchasing equities worth Rs 2,301.87 crore on a net basis on Tuesday. However, in the afternoon session, markets came off from day's high points as investors booked some profit but markets managed to end in green. Some cautiousness came as the World Bank pegged India's economic growth projection at a lower level of 6.3 per cent for 2025-26 due to pressure on exports emanating from global uncertainties.

Some of the important factors in today's trade:

India, EU Very Near to finalizing free trade agreement: Some support came as Commerce and Industry Minister Piyush Goyal said that India and the 27-nation EU bloc are really very near to concluding talks for the proposed free trade agreement, with only a few issues left to be resolved.

India-US trade pact to provide opportunity to expand economic ties: Sentiments remained upbeat as Commerce and Industry Minister Piyush Goyal has said that the proposed bilateral trade agreement between India and the US will provide both the countries with an opportunity to expand and strengthen trade ties.

Jaishankar holds productive India-EU strategic dialogue in Brussels: Traders took note of External Affairs Minister S Jaishankar held very open and productive talks with the European Union's High Representative in Brussels, covering areas of defence and security, maritime security, cyber and space.

Global front: European markets were trading in green, as Euro area investor morale rose to the highest level in a year in June, driven by the economic recovery in Germany. Asian markets ended mostly in green after top U.S. and Chinese officials said they have reached a framework to implement the Geneva consensus, following two days of discussions in London.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	82515.14	123.42	0.15
NIFTY	25141.40	37.15	0.15
MIDCAP	46532.22	-57.27	-0.12
SMLCAP	54281.27	30.46	0.06
BSEFMC	20511.09	-115.71	-0.56
HEALTHCARE	44008.17	323.11	0.74
AUTO	53409.73	102.19	0.19
POWER	6928.01	-56.24	-0.81
REALTY	7975.90	11.14	0.14
BSE IT	38269.89	470.93	1.25
BANKEX	63730.52	-179.22	-0.28
OIL GAS	27903.52	502.39	1.83
METAL	31513.06	23.70	0.08
INDIA VIX	13.67	-0.35	-2.48

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1608	1304	83
BSE	2233	1813	134

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	8715	9436	(8)
NSE CASH	124232	115863	7
NSE F&O	149617	129951	15

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	22.60	3.66	1.17
SENSEX	23.08	4.25	1.08

KEY NUMBERS TRACKER



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

FII-DII*	Buy	Sell	Net
DII	14765	13180	1585
FII	14531	14977	(446)

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)

FII	Buy	Sell	Net
Index Futures	3315.96	2070.33	1246
Index Options	1340332.95	1283386.21	56947
Stock Futures	17277.03	18489.95	(1213)
Stock Options	76821.79	80474.31	(3653)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	0.97	0.96
BANK NIFTY	0.96	0.99

DOLLAR INDEX

Dollar Index	Current	Previous	% Change
DXY	99.02	99.10	-0.08

10-YEARS G-SEC YIELD

Country	Current	Previous	% Change
INDIA	6.303	6.294	0.25
USA	4.495	4.455	0.49

KEY COMMODITIES TRACKER (in \$)

Commodity	Current	Change Points	% Change
Gold	3331.77	4.28	0.15
Silver	36.26	-0.32	-0.93
Crude-Oil	65.92	1.16	1.80
Brent-Crude	67.65	1.08	1.63

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES			
Expiry	Close	Change Points	% Change
26 JUNE-25 USD-INR	85.57	-0.07	-0.08
26 JUNE-25 EUR-INR	97.90	-0.007	-0.007
26 JUNE-25 GBP-INR	115.45	-0.19	-0.17
26 JUNE-25 JPY- INR	59.20	-0.39	-0.66

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS						
Index	Close	S2	S1	Pivot	R1	R2
NIFTY	25141	25007	25074	25148	25215	25289
SENSEX	82515	82061	82288	82536	82763	83010
NIFTY FUTURES	25212	25053	25132	25220	25299	25387
BANK NIFTY	56460	56164	56312	56547	56695	56930
CNX IT	38784	37992	38388	38611	39008	39231
CNX MIDCAP	59388	58712	59050	59465	59803	60218
CNX SMALLCAP	18799	18497	18648	18816	18967	19136
INDIA VIX	13.67	13.20	13.43	13.80	14.03	14.40

INDEX TREND ANALYSIS			
Index	Daily	Weekly	Monthly
NIFTY	Buy	Buy	Buy
SENSEX	Buy	Buy	Buy
NIFTY FUTURES	Buy	Buy	Buy
BANK NIFTY	Buy	Buy	Buy
CNX IT	Buy	Neutral	Neutral
CNX MIDCAP	Buy	Neutral	Buy
CNX SMALLCAP	Buy	Buy	Buy
INDIA VIX	Sell	Buy	Neutral

SECURITIES BAN IN F&O TRADES FOR 12-06-2025
ABFRL, CHAMBLFERT, HINDCOPPER, IREDA, RBLBANK, TITAGARH

TECHNICAL VIEWS



NIFTY

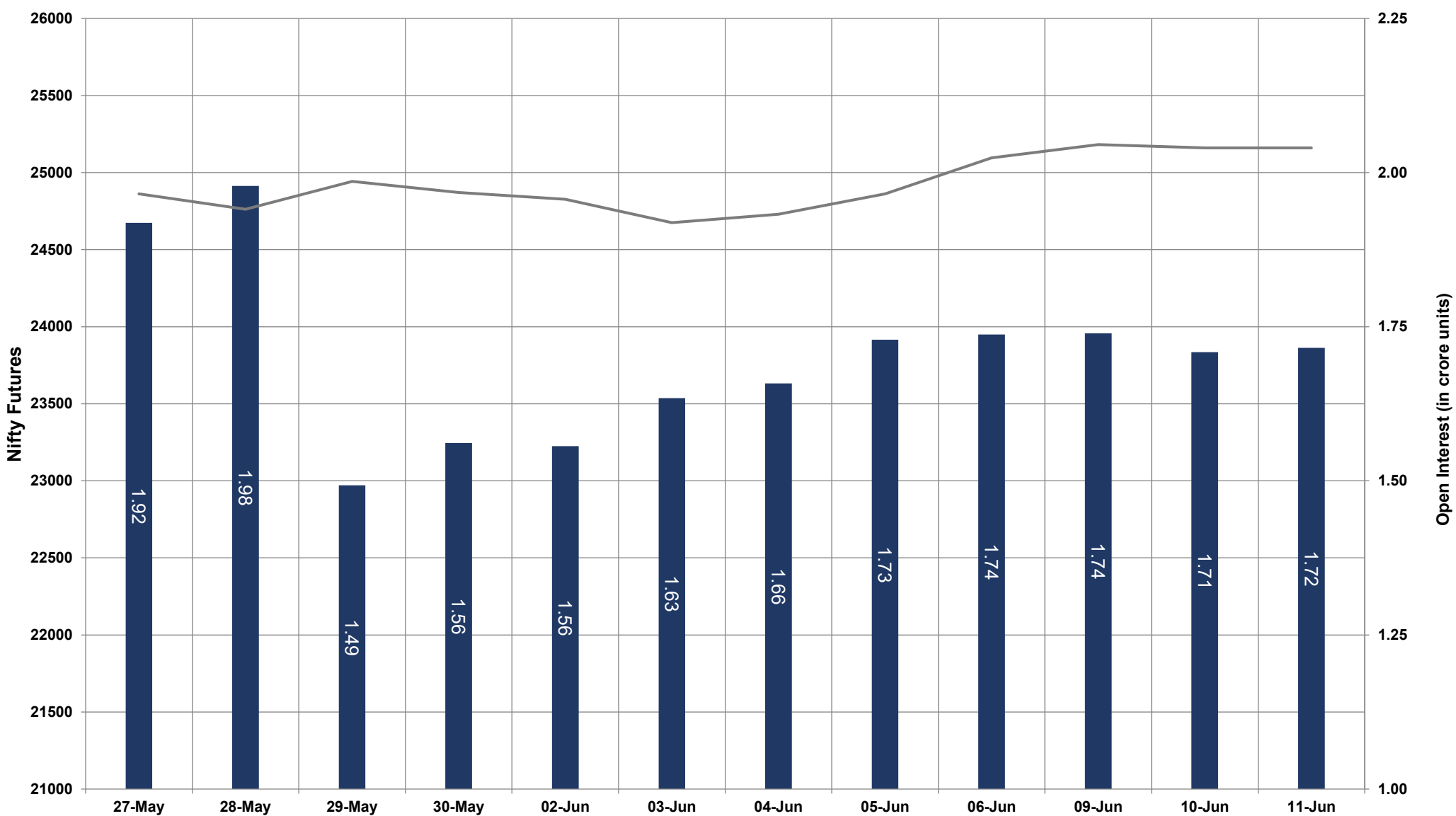


- Nifty Cash = **25141.40 (0.15%)**
- Resistance levels = **25280** and **25450**
- Support levels = **24950** and **24750**

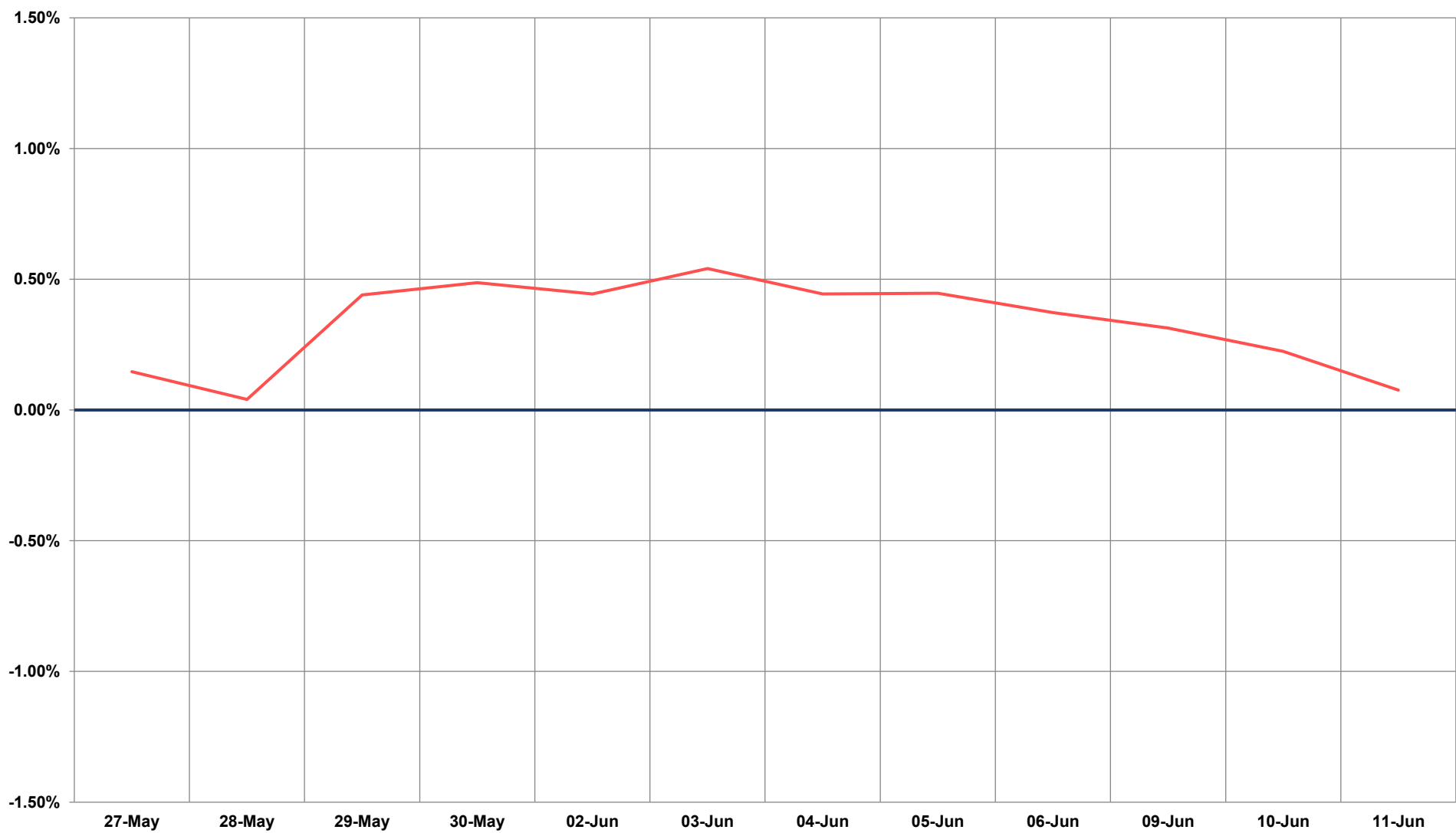
TECHNICAL VIEWS



NIFTY FUTURES



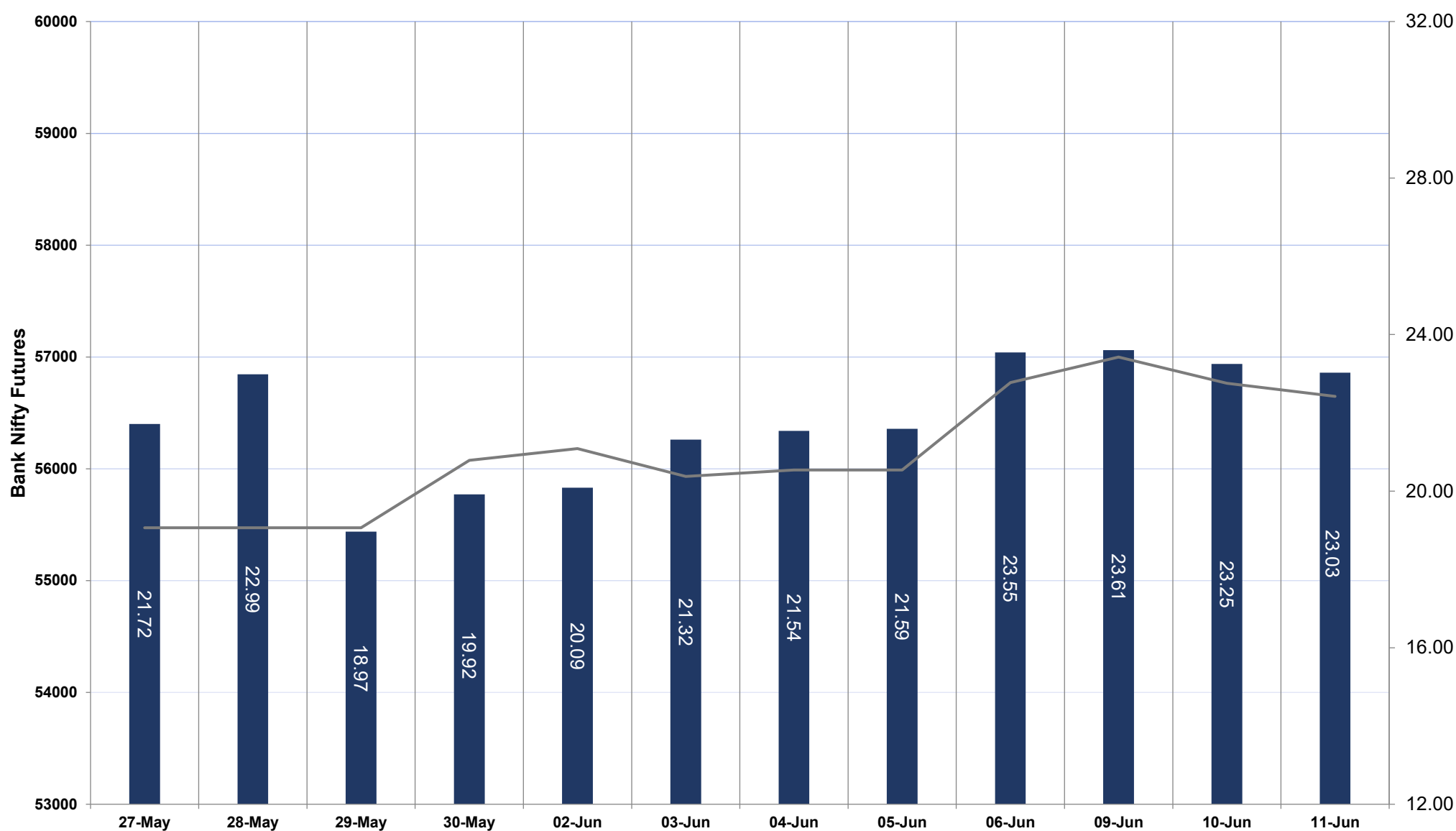
SPREAD: FUTURE & SPOT



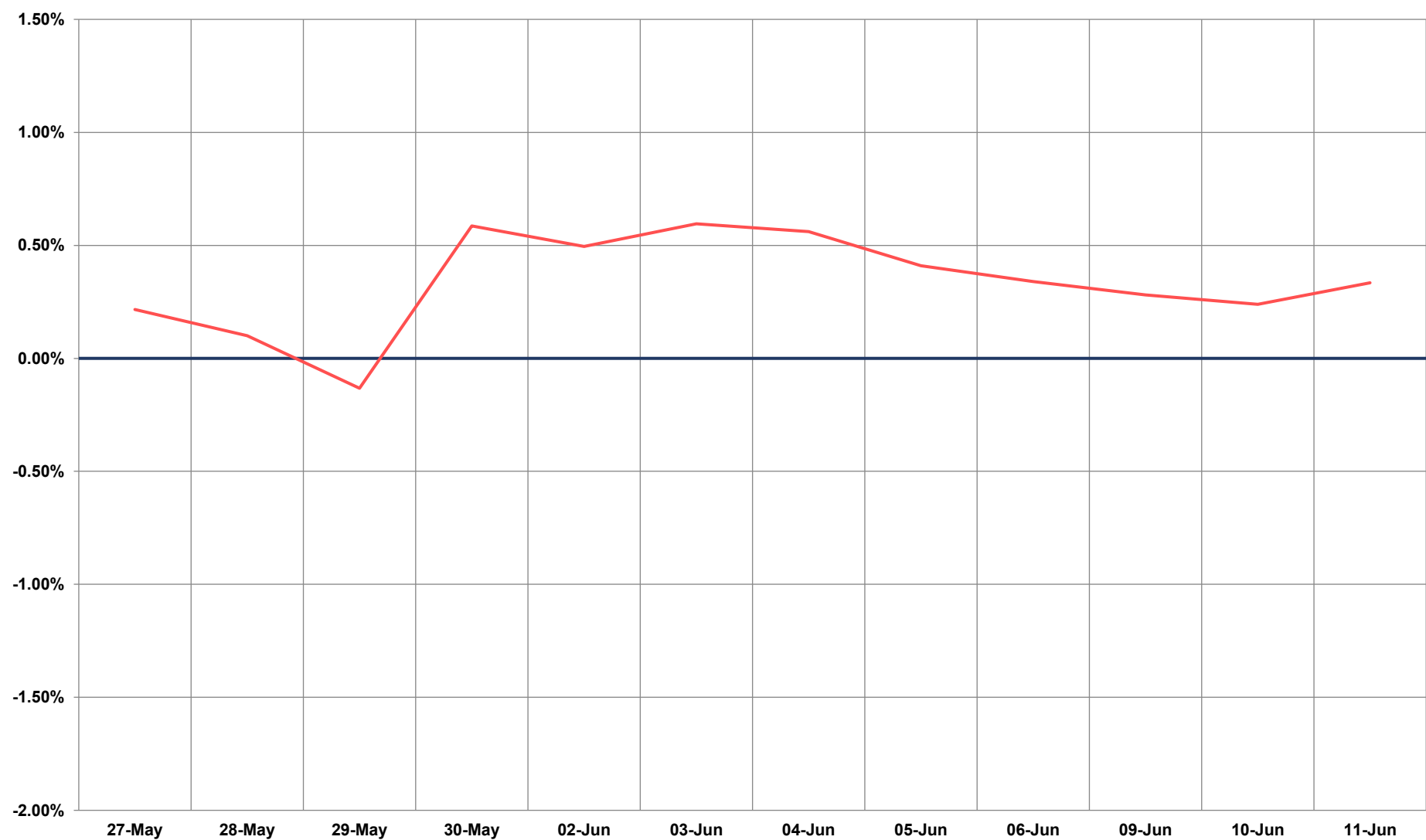
TECHNICAL VIEWS



BANK NIFTY FUTURES

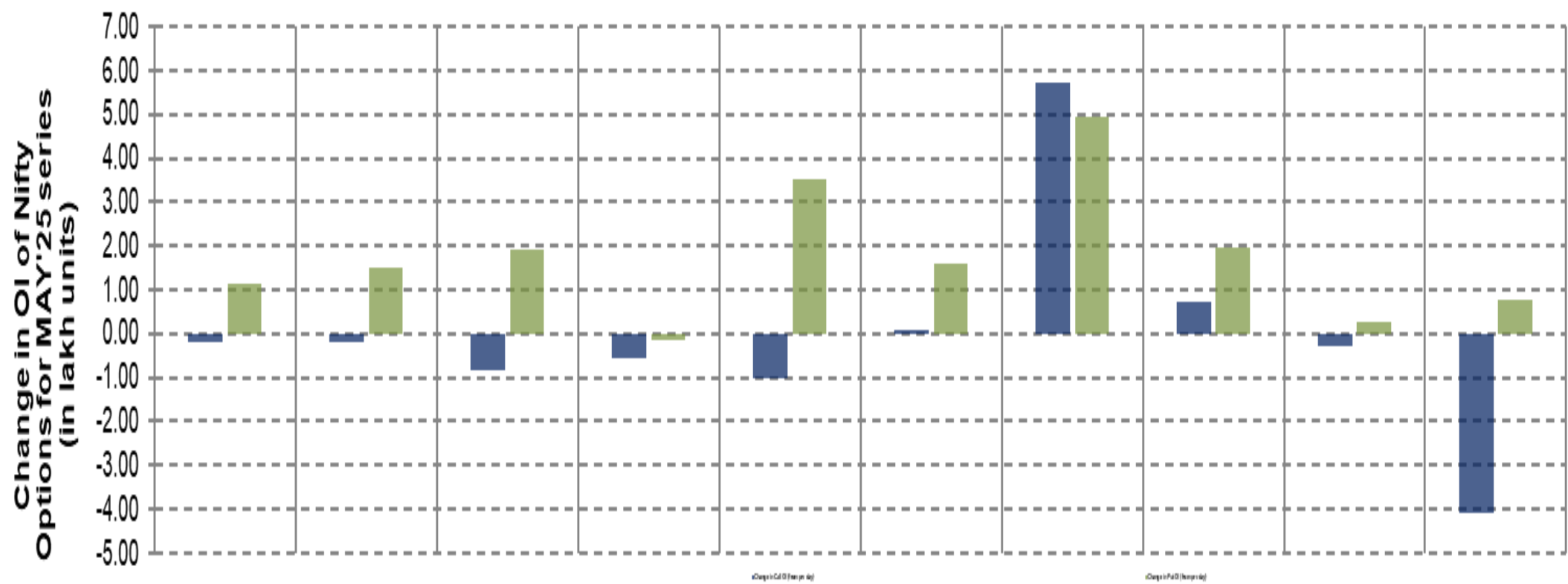
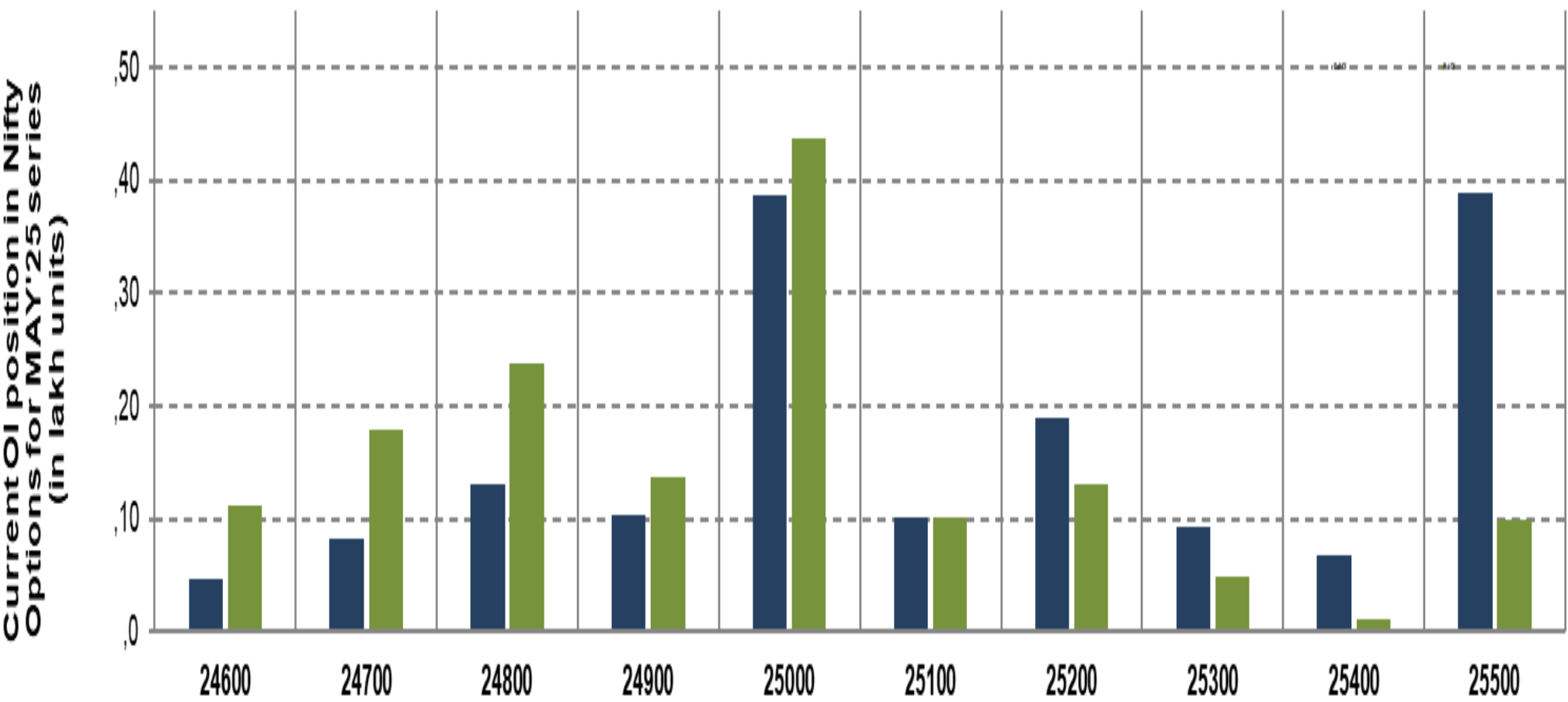


SPREAD: FUTURE & SPOT





NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.57 million in Open Interests is **Strike Price of 25200**
- **Most Active Nifty Put** with an addition of 0.49 millions in Open Interests is **Strike Price of 25200**
- **Maximum Open Interest** an outstanding was 3.88 millions for Calls at **Strike Price of 25500**
- **Maximum Open Interest** an outstanding was 4.37 millions for puts at **Strike Price of 25000**

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