



MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

June 13, 2025



Indian equity benchmarks plunged deep into the red on Friday, weighed down by weak global cues. Markets made a gap-down opening and remained under pressure during the morning session, as traders were cautious after Israel launched an airstrike on Iran and declared a special state of emergency, raising fears of oil supply disruption. However, market came off from day's low points, but closed in negative territory.

Some of the important factors in today's trade:

Foreign fund outflow: Foreign fund outflows dented the domestic sentiments. Foreign Institutional Investors (FIIs) offloaded equities worth Rs 3,831.42 crore on Thursday, according to exchange data.

Retail inflation eases to six-year low of 2.82% in May: Traders overlooked India's positive inflation data. India's inflation rate based on the Consumer Price Index (CPI) declined to 2.82 per cent in May this year compared to the same month of the previous year. This is the lowest level of retail inflation since February 2019.

China on lifting export curbs on rare earth metals to India: Traders took a note of report that China has hinted at holding talks with India over its restrictions on export of rare earth materials, saying it is willing to enhance dialogue and cooperation with relevant countries to keep industrial supply chains stable.

Global front: European markets were trading in red, while Asian markets ended in red after Israel conducted 'pre-emptive' strikes on Iran; targeting several nuclear and military assets. Israel also declared a state of emergency in anticipation of a missile and drone strike by Tehran and said it has begun intercepting Iranian drones.

MARKET SELFIE



MARKET SUMMARY

| Domestic Indices | Close | Points | % Change |
|------------------|----------|---------|----------|
| SENSEX | 81118.60 | -573.38 | -0.70 |
| NIFTY | 24718.60 | -169.60 | -0.68 |
| MIDCAP | 45681.28 | -145.76 | -0.32 |
| SMLCAP | 53370.29 | -161.18 | -0.30 |
| BSEFMC | 20065.88 | -190.21 | -0.94 |
| HEALTHCARE | 43995.31 | 34.42 | 0.08 |
| AUTO | 52323.67 | -172.14 | -0.33 |
| POWER | 6725.34 | -51.07 | -0.75 |
| REALTY | 7820.91 | 10.24 | 0.13 |
| BSE IT | 37839.09 | -33.85 | -0.09 |
| BANKEX | 62570.44 | -639.51 | -1.01 |
| OIL GAS | 27162.24 | -154.43 | -0.57 |
| METAL | 30747.36 | -251.25 | -0.81 |
| INDIA VIX | 15.08 | 1.06 | 7.56 |

ADVANCE - DECLINE

| Index | Advance | Decline | Unchanged |
|-------|---------|---------|-----------|
| NSE | 1059 | 1824 | 81 |
| BSE | 1516 | 2469 | 138 |

MARKET TURNOVER (₹ in Crs)

| Segment | Current | Previous | Net % |
|----------|---------|----------|-------|
| BSE CASH | 6975 | 7007 | (0) |
| NSE CASH | 104982 | 117581 | (11) |
| NSE F&O | 161776 | 193908 | (17) |

KEY INDICES RATIOS

| INDEX | P/E | P/B | Dividend Yield |
|--------|-------|------|----------------|
| NIFTY | 22.22 | 3.60 | 1.19 |
| SENSEX | 22.69 | 4.18 | 1.09 |

KEY NUMBERS TRACKER



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

| FII-DII* | Buy | Sell | Net |
|----------|-------|-------|--------|
| DII | 13488 | 10446 | 3041 |
| FII | 14163 | 15426 | (1264) |

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)

| FII | Buy | Sell | Net |
|--------------|-----------|-----------|--------|
| Ind. Futures | 3733.55 | 4509.68 | (776) |
| Ind. Options | 874267.82 | 875696.80 | (1429) |
| Stk. Futures | 19809.56 | 22508.84 | (2699) |
| Stk. Options | 81113.71 | 81799.54 | (686) |

PUT-CALL RATIO

| Index | Current | Previous |
|------------|---------|----------|
| NIFTY | 0.90 | 0.73 |
| BANK NIFTY | 0.74 | 0.83 |

DOLLAR INDEX

| Dollar Index | Current | Previous | % Change |
|--------------|---------|----------|----------|
| DXY | 98.51 | 97.87 | 0.63 |

10-YEARS G-SEC YIELD

| Country | Current | Previous | % Change |
|---------|---------|----------|----------|
| INDIA | 6.301 | 6.277 | -0.29 |
| USA | 4.367 | 4.378 | 0.25 |

KEY COMMODITIES TRACKER (in \$)

| Commodity | Current | Change Points | % Change |
|-------------|---------|---------------|----------|
| Gold | 3414.93 | 18.50 | 0.54 |
| Silver | 36.10 | -0.28 | -0.77 |
| Crude-Oil | 73.60 | 4.78 | 6.93 |
| Brent-Crude | 74.71 | 4.50 | 6.37 |

CURRENCY FUTURES & INDEX TRENDS TRACKER



| CURRENCY FUTURES | | | | |
|------------------|----------|--------|---------------|----------|
| Expiry | | Close | Change Points | % Change |
| 26 JUNE-25 | USD-INR | 86.18 | 0.61 | 0.71 |
| 26 JUNE-25 | EUR-INR | 99.10 | -0.19 | -0.19 |
| 26 JUNE-25 | GBP-INR | 116.61 | 0.32 | 0.27 |
| 26 JUNE-25 | JPY- INR | 59.90 | 0.22 | 0.37 |

| INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS | | | | | | |
|---|-------|-------|-------|-------|-------|-------|
| Index | Close | S2 | S1 | Pivot | R1 | R2 |
| NIFTY | 24719 | 24367 | 24543 | 24649 | 24824 | 24930 |
| SENSEX | 81119 | 80020 | 80569 | 80904 | 81453 | 81788 |
| NIFTY FUTURES | 24727 | 24483 | 24605 | 24698 | 24820 | 24912 |
| BANK NIFTY | 55527 | 54916 | 55222 | 55455 | 55760 | 55994 |
| CNX IT | 38469 | 37328 | 37898 | 38293 | 38864 | 39258 |
| CNX MIDCAP | 58227 | 56843 | 57535 | 57939 | 58631 | 59034 |
| CNX SMALLCAP | 18375 | 17931 | 18153 | 18294 | 18516 | 18658 |
| INDIA VIX | 15.08 | 13.07 | 14.07 | 15.03 | 16.03 | 16.99 |

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

| SECURITIES BAN IN F&O TRADES FOR 16-06-2025 |
|--|
| ABFRL,BSOFT,CDSL, CHAMBLFERT, HUDCO,IEX, IREDA,MANAPPURAM, RBLBANK, TITAGARH |

TECHNICAL VIEWS



NIFTY

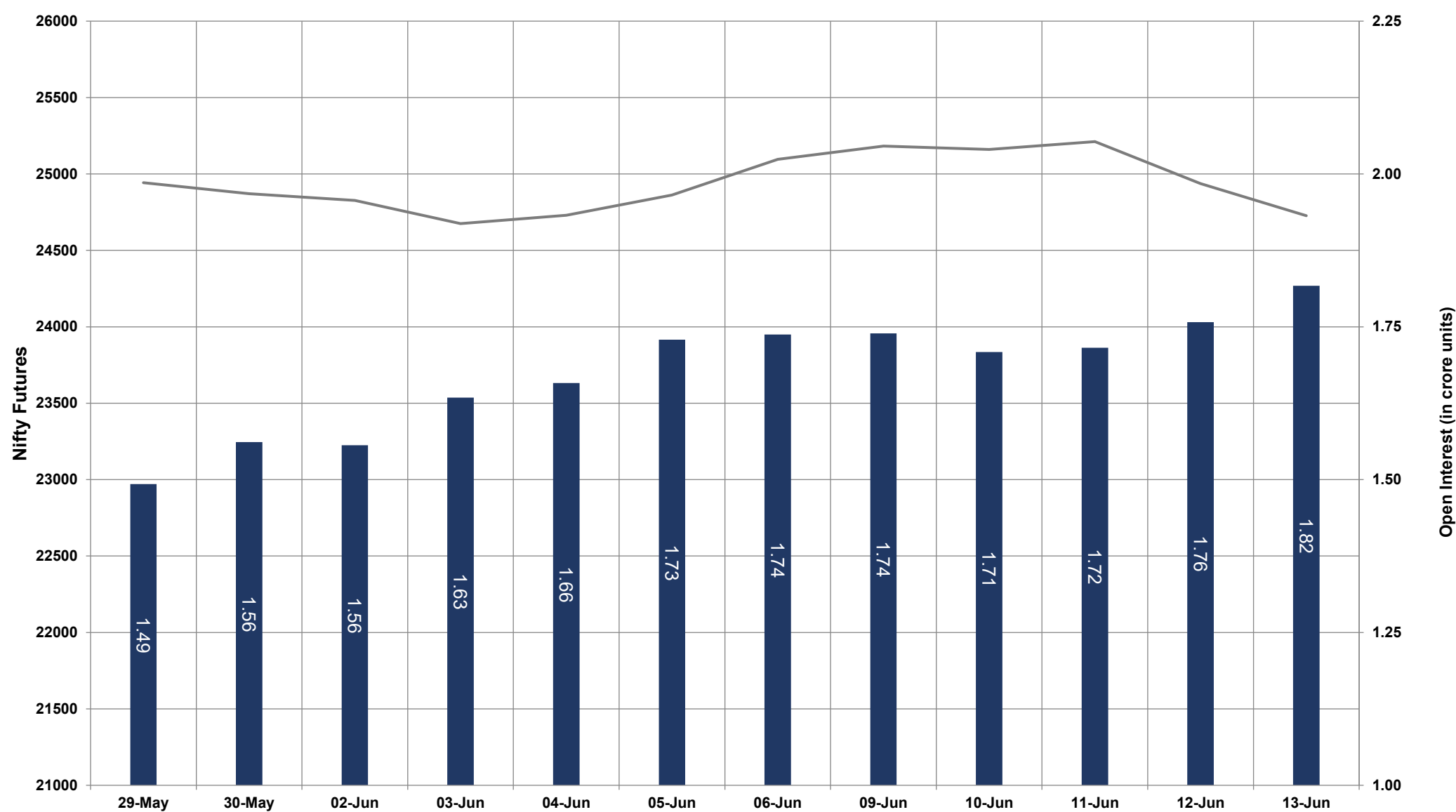


- Nifty Cash = **24718.60 (-0.68%)**
- Resistance levels = **24850** and **25000**
- Support levels = **24600** and **24450**

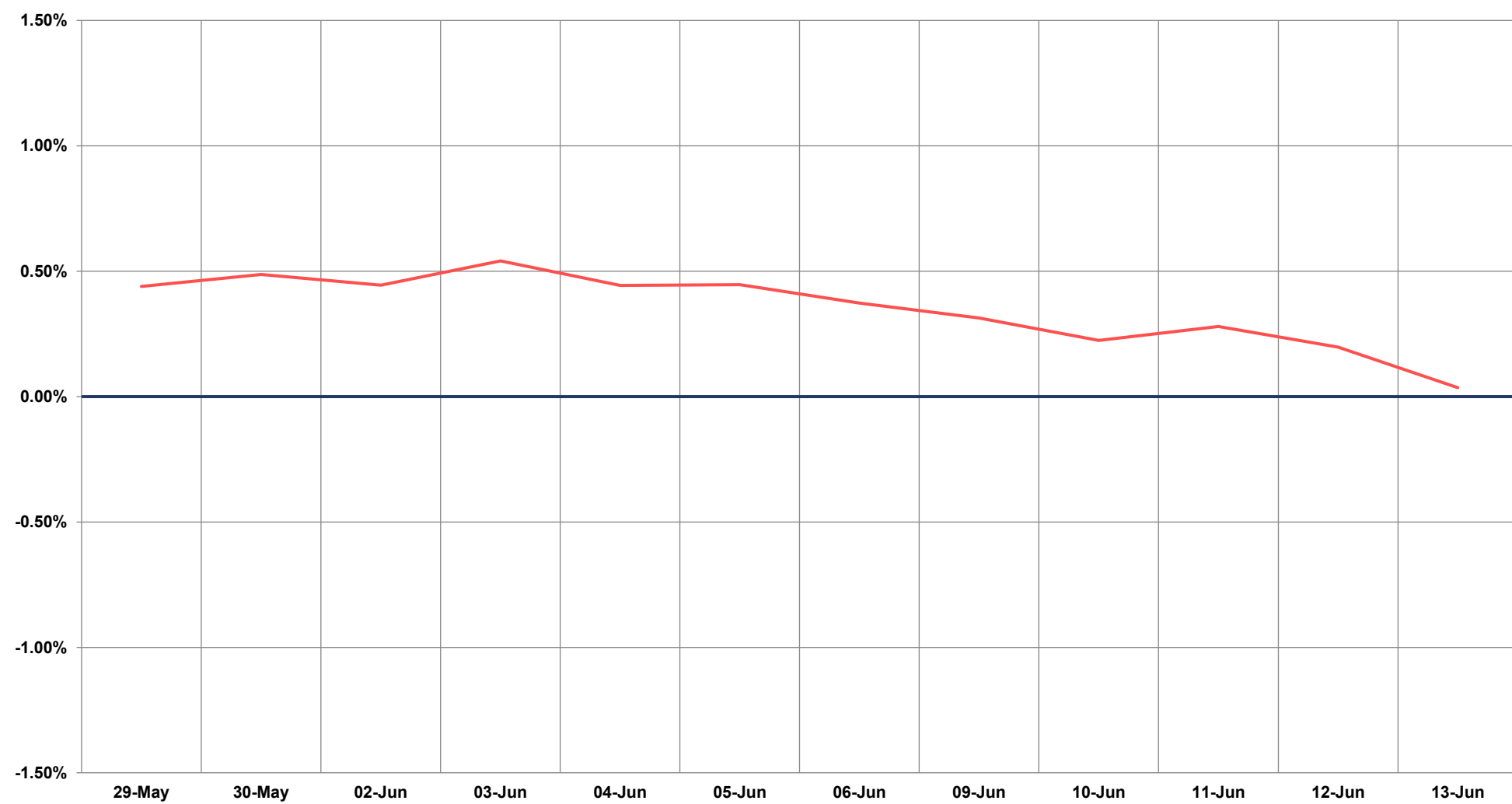
TECHNICAL VIEWS



NIFTY FUTURES



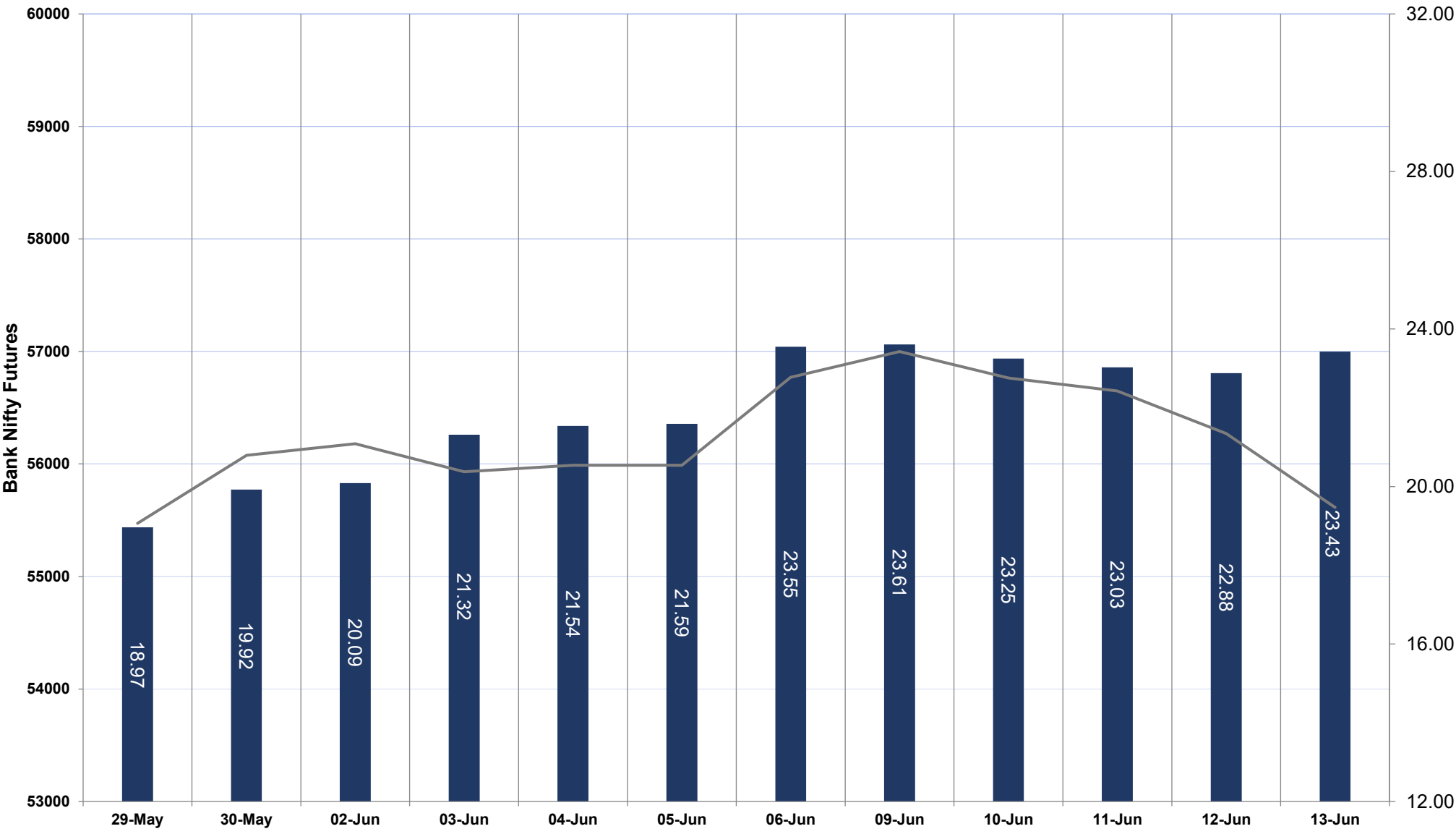
SPREAD: FUTURE & SPOT



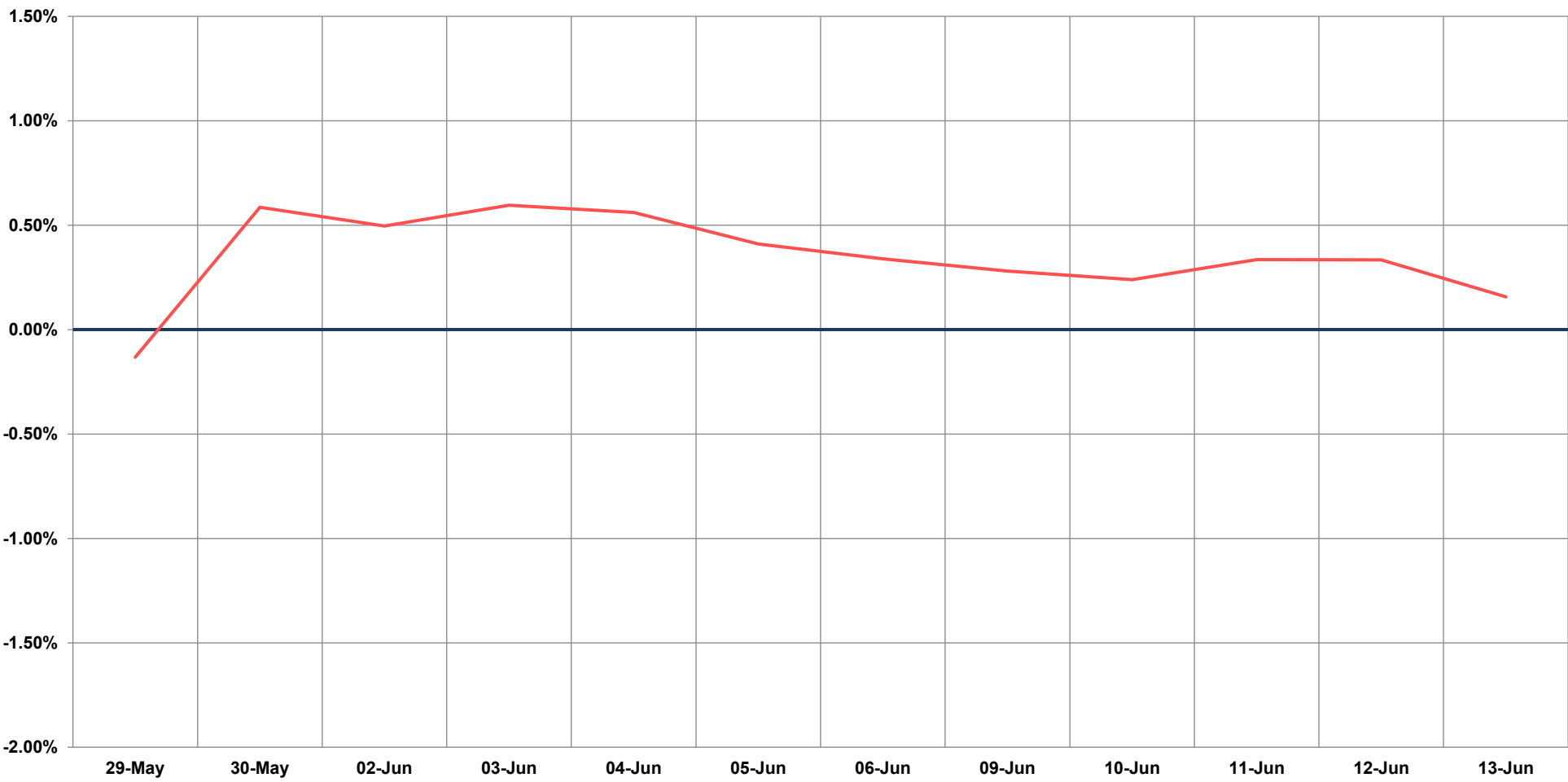
TECHNICAL VIEWS



BANK NIFTY FUTURES



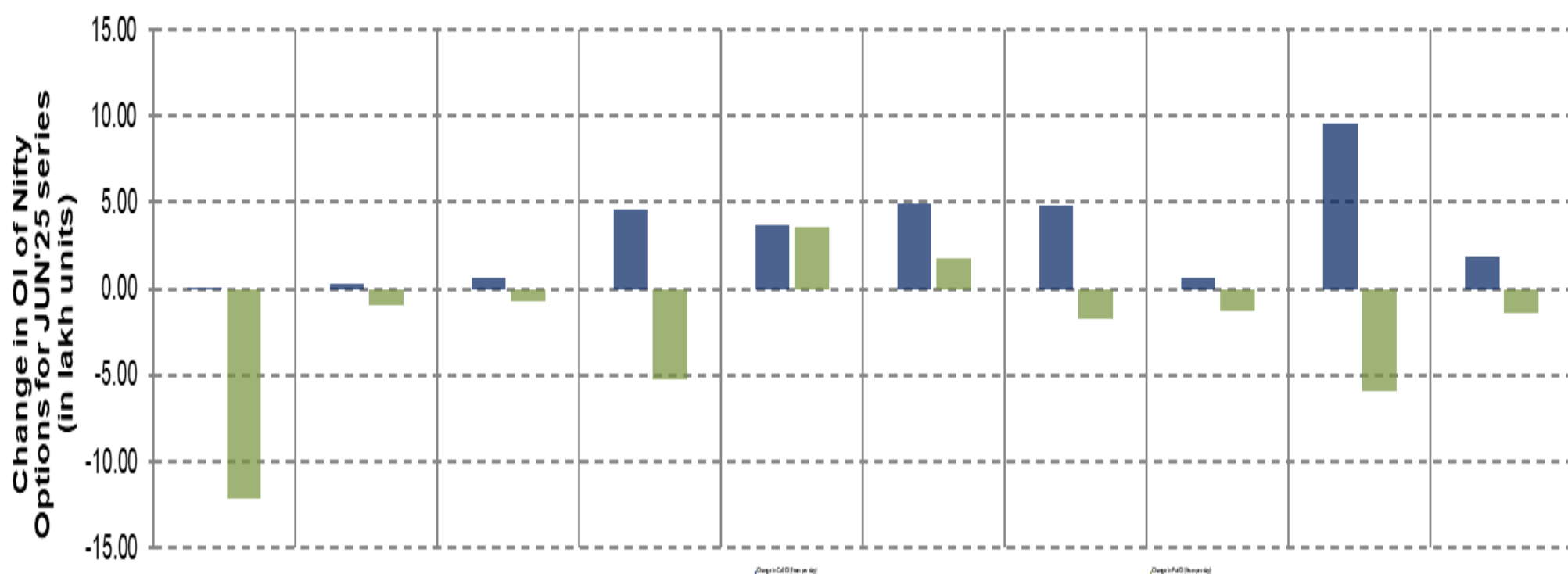
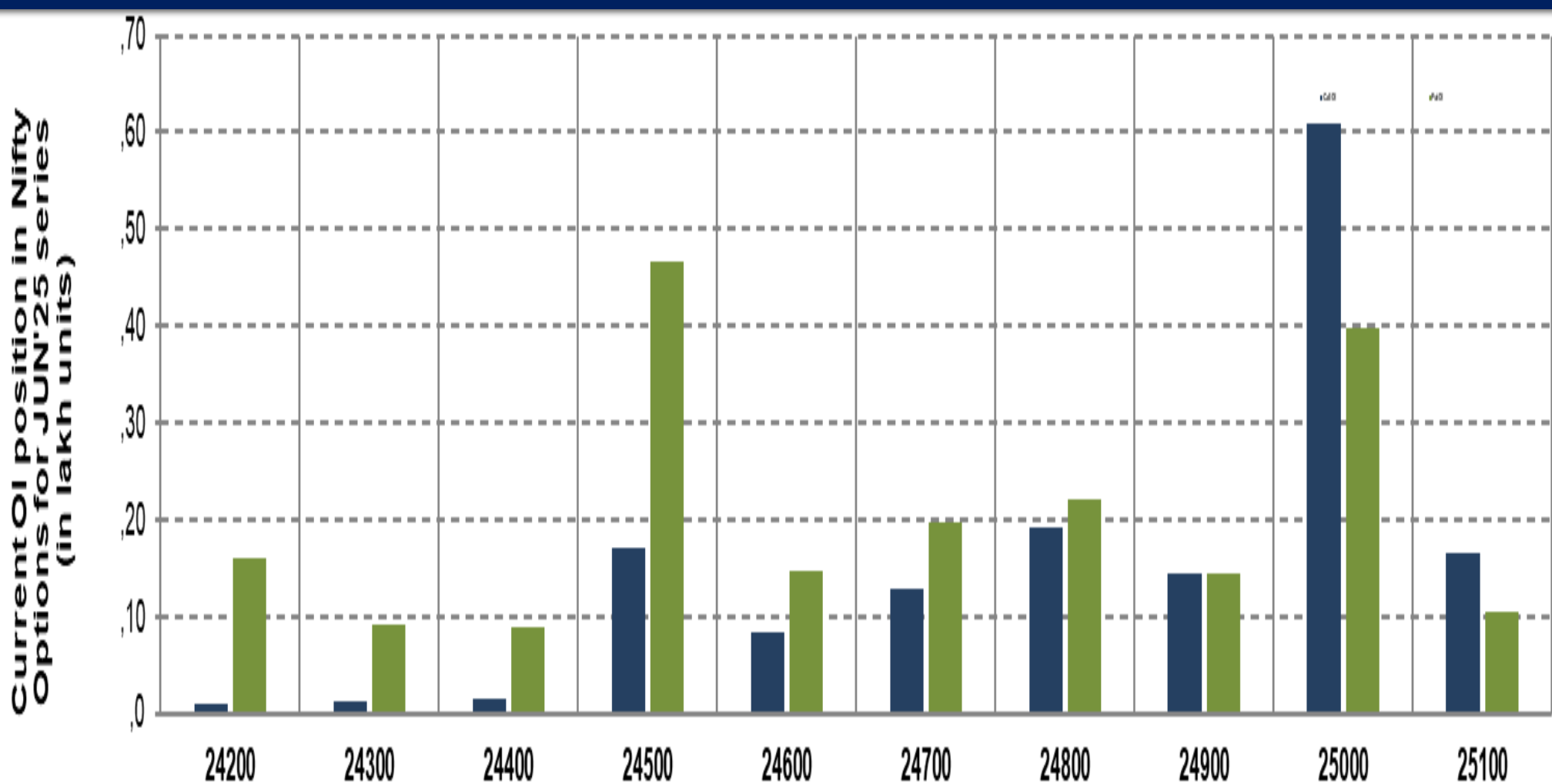
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.95 million in Open Interests is **Strike Price of 25000**
- **Most Active Nifty Put** with a reduction of 1.2 millions in Open Interests is **Strike Price of 24600**
- **Maximum Open Interest an outstanding** was 6.08 millions for Calls at **Strike Price of 25000**
- **Maximum Open Interest an outstanding** was 4.66 millions for puts at **Strike Price of 24500**

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