



# MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

June 18, 2025



Indian equity benchmarks ended in negative territory on Wednesday as traders remained cautious following intensified missile attacks between Iran and Israel. After a slightly negative start, soon indices turned green, as traders found some support from the exchange data showing that foreign institutional investors (FIIs) purchased equities worth Rs 1,482.77 crore on a net basis on Tuesday. However, in late morning session, market slipped into red and remained lower till the end, as traders remained cautious ahead of the U.S. Fed's interest-rate decision.

Some of the important factors in today's trade:

India needs to become indispensable like China: Traders took note of Chief Economic Advisor (CEA) to the Indian government, V Anantha Nageswaran, has said the country needs to prioritise areas like manufacturing, education, and employment generation to become a developed nation by 2047 and become indispensable like China.

India's exports show steady growth from 2010 to 2023: Traders overlooked a report stating that India's export trajectory from 2010 to 2023 has shown a consistent and steady upward trend, reflecting the resilience and dynamism of its trade sector.

India's real GDP growth for FY26 may exceed 6.5%: Traders paid no head towards the leading ratings agency ICRA, in its latest outlook, has projected that India's real GDP growth for 2025-26 financial year will exceed 6.5 per cent. The agency also said the country's real Gross Value Added (GVA) growth will surpass 6.3 per cent during the same period.

Global front: European markets were trading mostly in green on Wednesday as UK consumer price inflation softened in May. Asian markets ended mostly higher on Wednesday, after Japan posted a merchandise trade deficit of 637.6 billion yen in May. That exceeded expectations for a shortfall of 893.0 billion yen following the upwardly revised 115.6-billion-yen deficit in April (originally 115.8 billion yen).

# MARKET SELFIE



## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	81444.66	-138.64	-0.17
NIFTY	24812.05	-41.35	-0.17
MIDCAP	45690.53	-155.83	-0.34
SMLCAP	53033.80	-179.00	-0.34
BSEFMC	20004.64	-94.57	-0.47
HEALTHCARE	43146.35	-227.27	-0.52
AUTO	52273.98	191.84	0.37
POWER	6701.20	-45.31	-0.67
REALTY	7828.60	-36.44	-0.46
BSE IT	38361.00	-293.35	-0.76
BANKEX	62883.98	16.69	0.03
OIL GAS	27114.21	-126.78	-0.47
METAL	30430.74	-197.89	-0.65
INDIA VIX	14.28	-0.13	-0.89

## ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1026	1851	78
BSE	1532	2448	135

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	5507	8236	(33)
NSE CASH	89893	103109	(13)
NSE F&O	147891	124160	19

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	22.30	3.61	1.16
SENSEX	22.78	4.19	1.06

# KEY NUMBERS TRACKER



FII – DII ACTIVITY IN CASH SEGMENT (₹ in Crs)			
FII-DII*	Buy	Sell	Net
DII	11093	10140	953
FII	12065	11120	945

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)			
FII	Buy	Sell	Net
Ind. Futures	3201.44	3157.86	44
Ind. Options	1427526.15	1441395.18	(13869)
Stk. Futures	16419.39	18199.80	(1780)
Stk. Options	78477.20	79039.50	(562)

PUT-CALL RATIO		
Index	Current	Previous
NIFTY	0.80	0.95
BANK NIFTY	0.79	0.74

DOLLAR INDEX			
Dollar Index	Current	Previous	% Change
DXY	98.73	98.82	-0.09

10-YEARS G-SEC YIELD			
Country	Current	Previous	% Change
INDIA	6.258	6.260	-0.02
USA	4.372	4.403	-0.41

KEY COMMODITIES TRACKER (in \$)			
Commodity	Current	Change Points	% Change
Gold	3382.32	-4.85	-0.14
Silver	37.12	0.01	0.02
Crude-Oil	75.03	-0.41	-0.52
Brent-Crude	76.60	-0.27	-0.32



# CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES			
Expiry	Close	Change Points	% Change
26 JUNE-25 USD-INR	86.54	0.27	0.31
26 JUNE-25 EUR-INR	99.60	-0.23	-0.23
26 JUNE-25 GBP-INR	116.42	-0.58	-0.49
26 JUNE-25 JPY- INR	59.80	0.07	0.13

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS						
Index	Close	S2	S1	Pivot	R1	R2
NIFTY	24812	24640	24726	24837	24923	25034
SENSEX	81445	80892	81168	81514	81790	82136
NIFTY FUTURES	24827	24671	24749	24864	24942	25057
BANK NIFTY	55829	55336	55583	55758	56004	56180
CNX IT	39031	38580	38806	39189	39414	39798
CNX MIDCAP	58109	57592	57851	58220	58479	58848
CNX SMALLCAP	18378	18138	18258	18391	18511	18643
INDIA VIX	14.28	13.68	13.98	14.40	14.70	15.12

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	Sell	Neutral	Neutral

SECURITIES BAN IN F&O TRADES FOR 17-06-2025
ABFRL, BSOFT, CDSL, CHAMBLFERT, HUDCO, IREDA, MANAPPURAM, RBLBANK, TITAGARH

# TECHNICAL VIEWS



## NIFTY

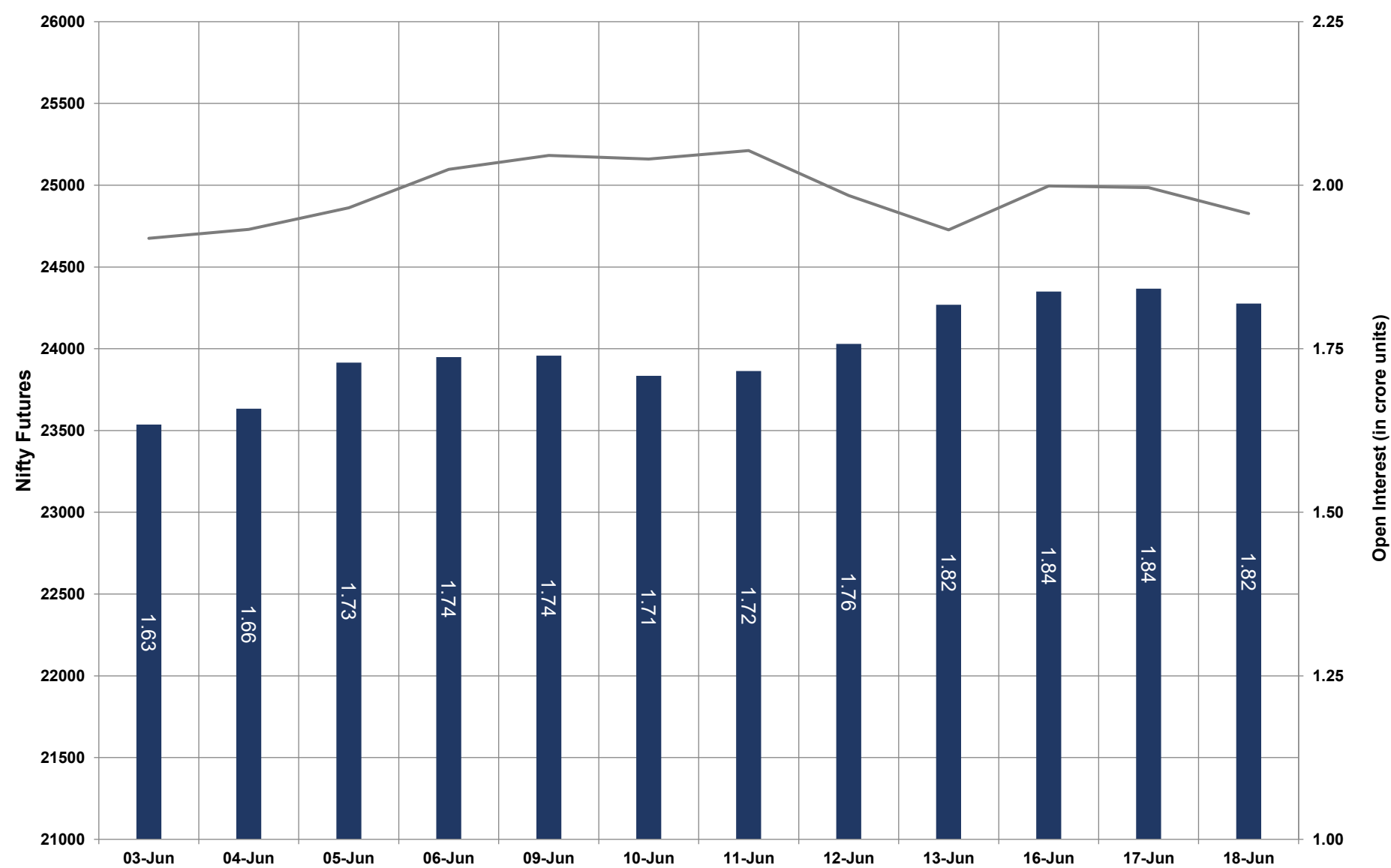


- Nifty Cash = **24812.05 (-0.17%)**
- Resistance levels = **25080** and **25200**
- Support levels = **24720** and **24650**

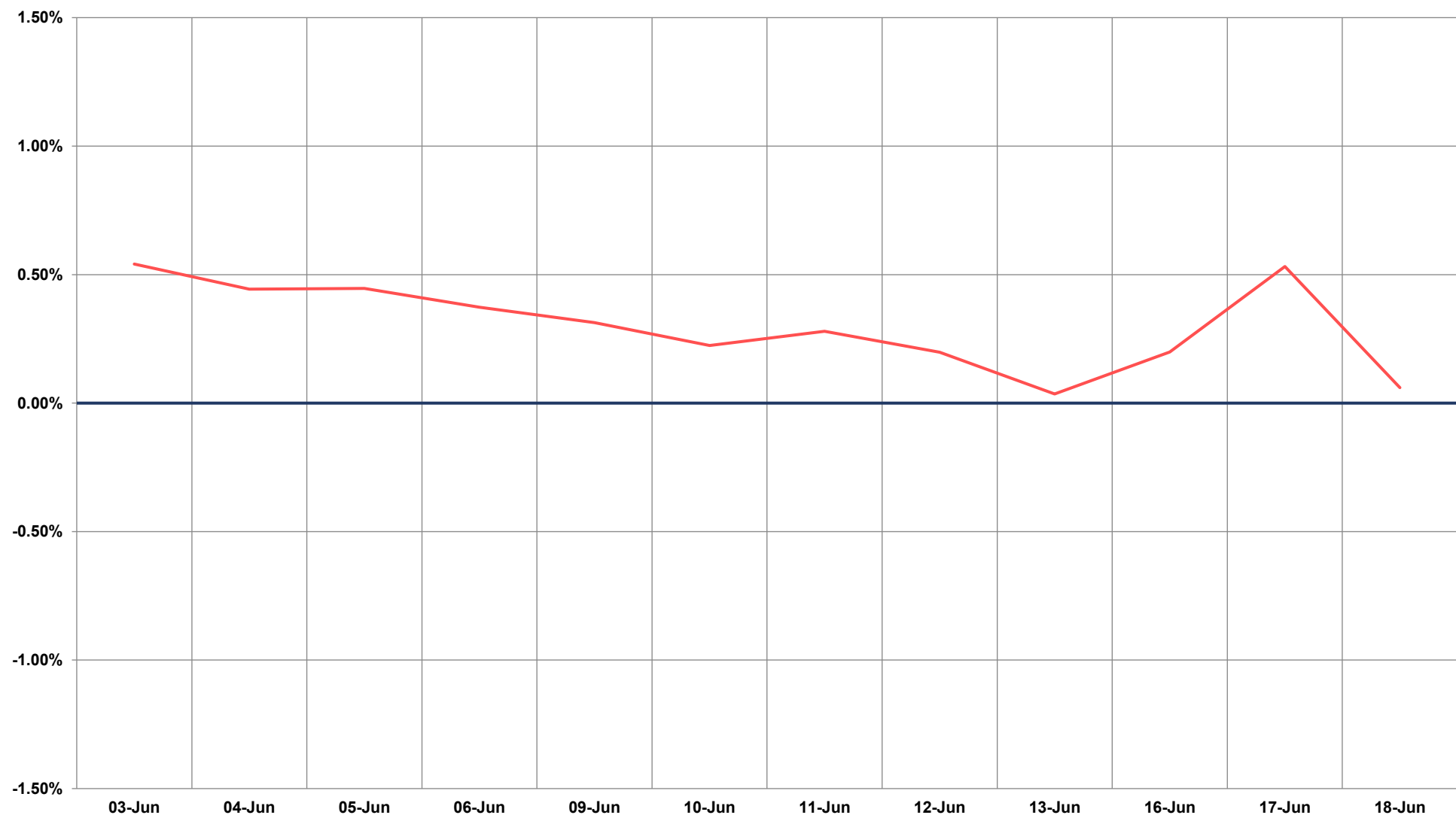
# TECHNICAL VIEWS



## NIFTY FUTURES



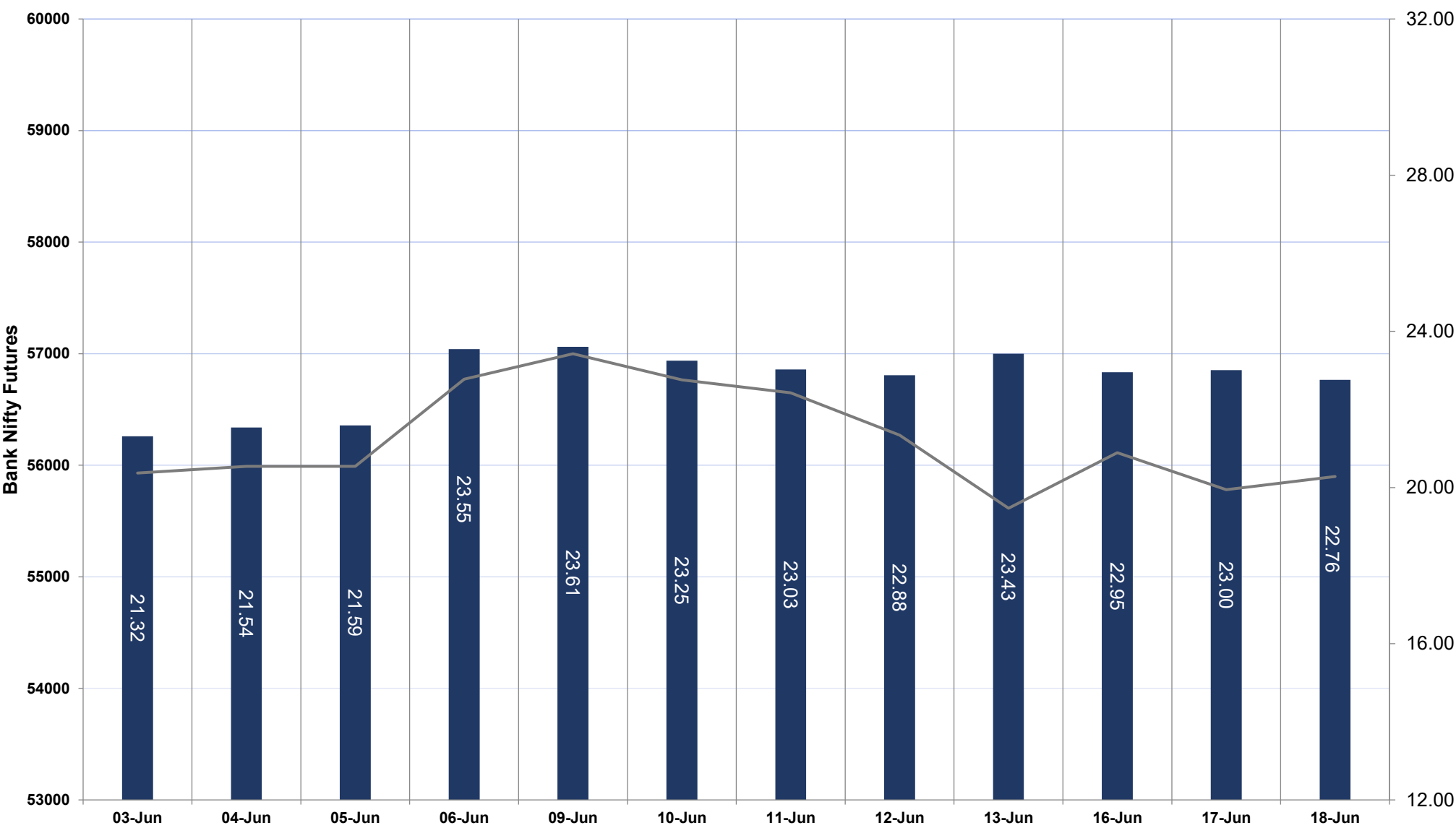
## SPREAD: FUTURE & SPOT



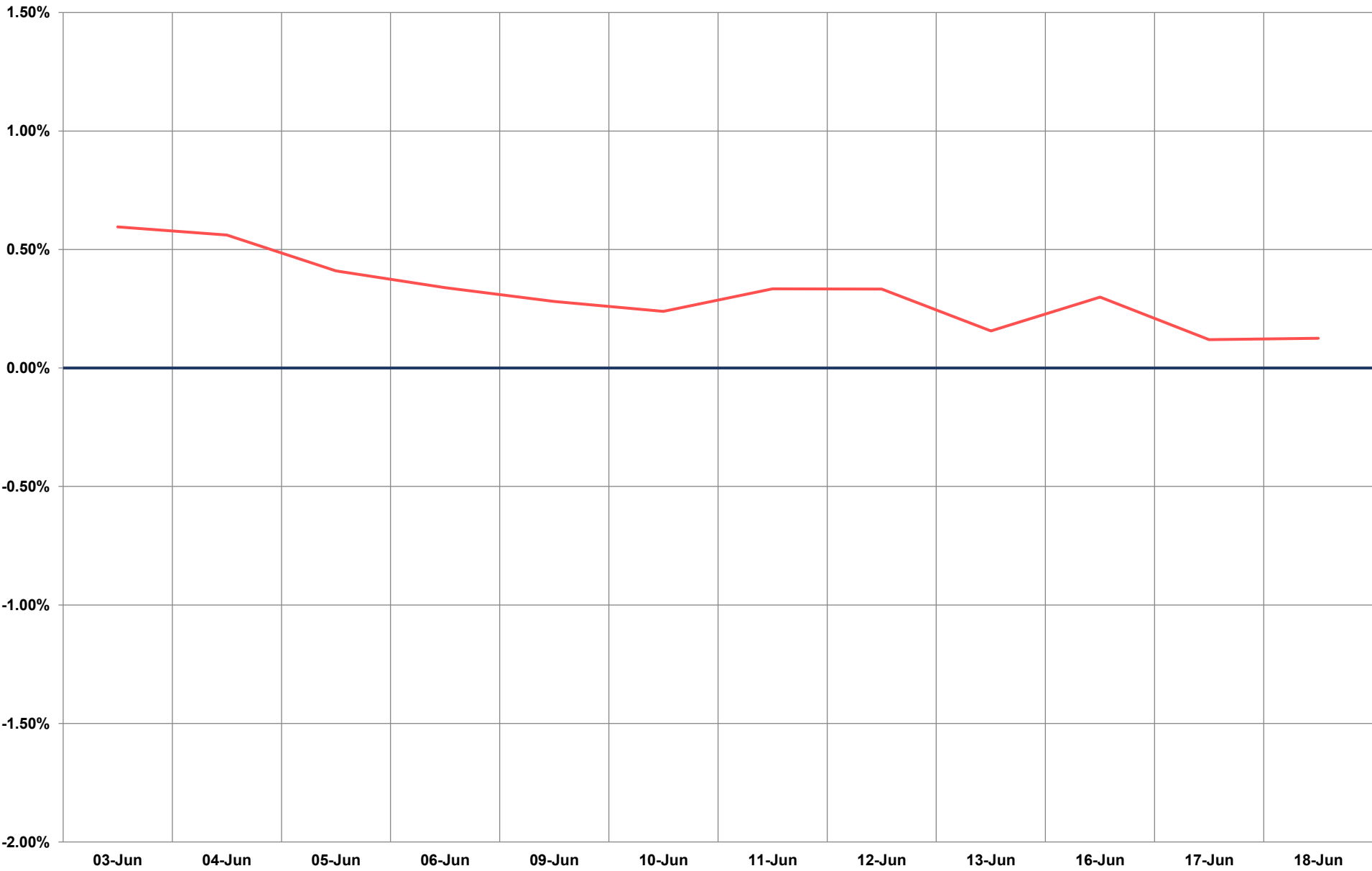
# TECHNICAL VIEWS



## BANK NIFTY FUTURES



## SPREAD: FUTURE & SPOT

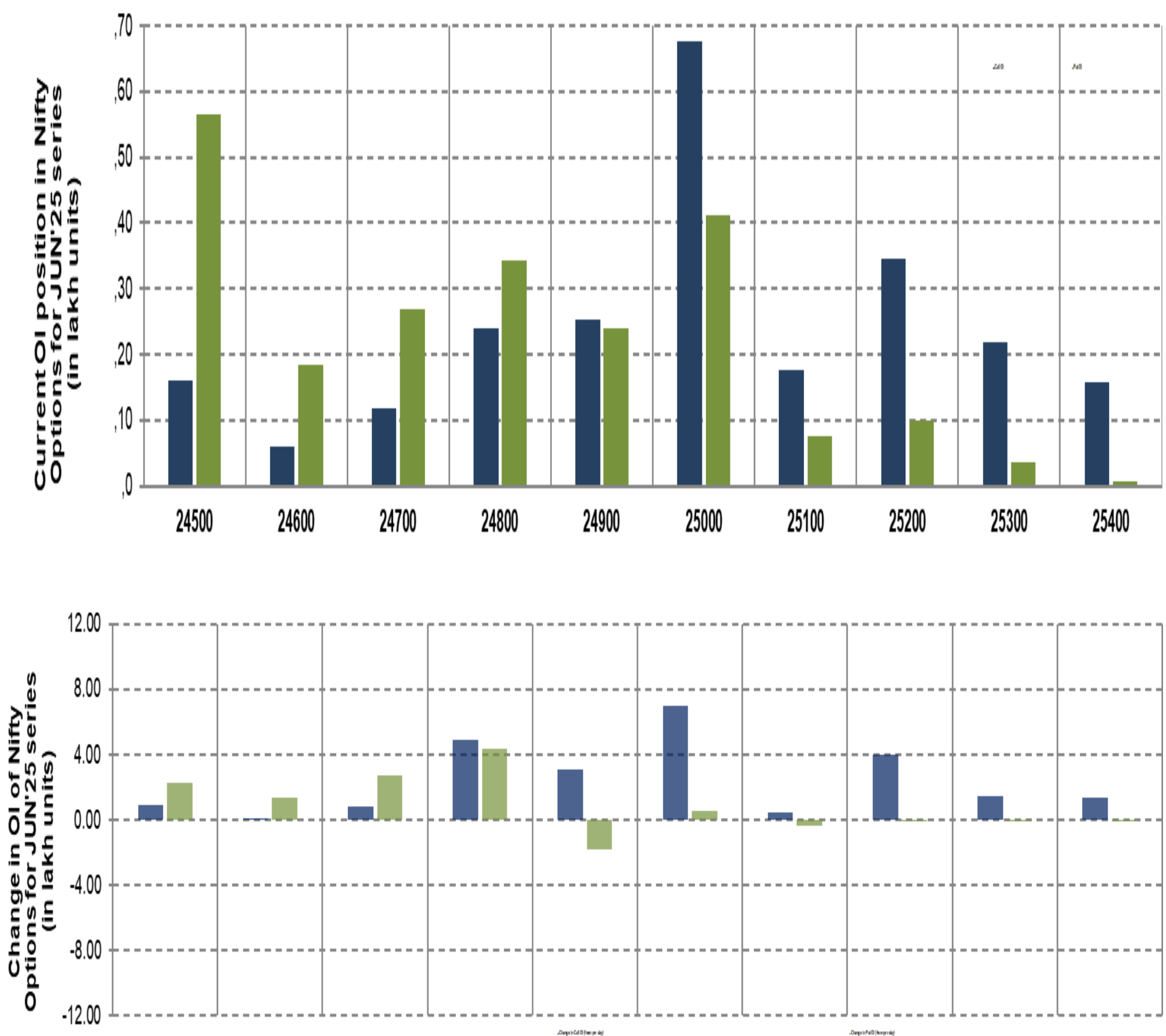




# TECHNICAL VIEWS



## NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.70 million in Open Interests is **Strike Price of 25000**
- **Most Active Nifty Put** with a addition of 0.43 millions in Open Interests is **Strike Price of 24800**
- **Maximum Open Interest an outstanding** was 6.75 millions for Calls at **Strike Price of 25000**
- **Maximum Open Interest an outstanding** was 5.65 millions for puts at **Strike Price of 24500**

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