



MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

June 19, 2025



Indian equity benchmarks ended a choppy trading session in negative territory on Thursday, ahead of the release of the Reserve Bank of India's Monetary Policy Committee (MPC) meeting minutes, scheduled for Friday. After a slightly negative start, soon indices traded near neutral lines for most of the day, amid escalating trend in the ongoing conflict between Israel and Iran as they continued to attack each other. In the final hour of trade, markets slipped into red but managed to close with minor losses.

Some of the important factors in today's trade:

India slips to 71st place on global Energy Transition Index released by WEF: Traders were cautious as India has been ranked 71st on a global Energy Transition Index released by the World Economic Forum (WEF). Sweden topped the list of 118 countries, followed by Finland, Denmark, Norway and Switzerland in the top five.

India-UK free trade pact provides stability, predictability to business: Traders overlooked Commerce and Industry Minister Piyush Goyal's statement that the India-UK Free Trade Agreement (FTA) brings stability and predictability for businesses in both the countries.

Government will continue to support fintech industry: Traders took note of report that Finance Minister Nirmala Sitharaman held a review meeting with fintech firms and assured that the government will continue to support the industry.

Global front: European markets were trading mostly in red, while Asian markets ended mostly in red on Thursday, as investors weighed the U.S. Federal Reserve's decision to keep interest rates steady, while the ongoing conflict between Israel and Iran continues to dent sentiment.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	81361.87	-82.79	-0.10
NIFTY	24793.25	-18.80	-0.08
MIDCAP	44941.19	-749.34	-1.64
SMLCAP	52093.75	-940.05	-1.77
BSEFMC	19920.47	-84.17	-0.42
HEALTHCARE	42750.33	-396.02	-0.92
AUTO	52494.00	220.02	0.42
POWER	6617.91	-83.29	-1.24
REALTY	7701.06	-127.54	-1.63
BSE IT	37923.32	-437.68	-1.14
BANKEX	62690.04	-193.94	-0.31
OIL GAS	26890.97	-223.24	-0.82
METAL	30072.11	-358.63	-1.18
INDIA VIX	14.25	-0.03	-0.21

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	516	2363	75
BSE	959	3018	140

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	5823	5507	6
NSE CASH	90377	89893	1
NSE F&O	149674	147891	1

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	22.29	3.61	1.16
SENSEX	22.75	4.19	1.06

KEY NUMBERS TRACKER



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

FII-DII*	Buy	Sell	Net
DII	10710	10345	366
FII	11966	10957	1008

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)

FII	Buy	Sell	Net
Ind. Futures	3302.42	2876.57	426
Ind. Options	3344454.10	3314278.26	30176
Stk. Futures	18574.28	18159.71	415
Stk. Options	81053.77	79443.91	1610

PUT-CALL RATIO

Index	Current	Previous
NIFTY	0.99	0.80
BANK NIFTY	0.72	0.79

DOLLAR INDEX

Dollar Index	Current	Previous	% Change
DXY	98.94	98.91	0.04

10-YEARS G-SEC YIELD

Country	Current	Previous	% Change
INDIA	6.310	6.258	0.83
USA	4.388	4.372	0.67

KEY COMMODITIES TRACKER (in \$)

Commodity	Current	Change Points	% Change
Gold	3371.30	-3.80	-0.11
Silver	36.36	-0.39	-1.07
Crude-Oil	76.40	1.54	2.08
Brent-Crude	77.72	1.47	1.92

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES			
Expiry	Close	Change Points	% Change
26 JUNE-25 USD-INR	86.77	0.26	0.30
26 JUNE-25 EUR-INR	99.61	0.13	0.13
26 JUNE-25 GBP-INR	116.53	0.21	0.18
26 JUNE-25 JPY- INR	59.98	0.15	0.26

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS						
Index	Close	S2	S1	Pivot	R1	R2
NIFTY	24793	24667	24730	24797	24860	24926
SENSEX	81362	80986	81174	81379	81567	81772
NIFTY FUTURES	24803	24675	24739	24815	24879	24956
BANK NIFTY	55577	55198	55388	55665	55855	56132
CNX IT	38665	38150	38407	38687	38945	39224
CNX MIDCAP	57160	56335	56747	57460	57873	58586
CNX SMALLCAP	18013	17657	17835	18137	18315	18617
INDIA VIX	14.26	13.49	13.88	14.12	14.51	14.75

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	Neutral	Neutral	Neutral
CNX MIDCAP	Neutral	Buy	Buy
CNX SMALLCAP	Neutral	Buy	Buy
INDIA VIX	Sell	Neutral	Neutral

SECURITIES BAN IN F&O TRADES FOR 20-06-2025
ABFRL, BSOFT, CDSL, HUDCO, MANAPPURAM, RBLBANK, TITAGARH

TECHNICAL VIEWS



NIFTY

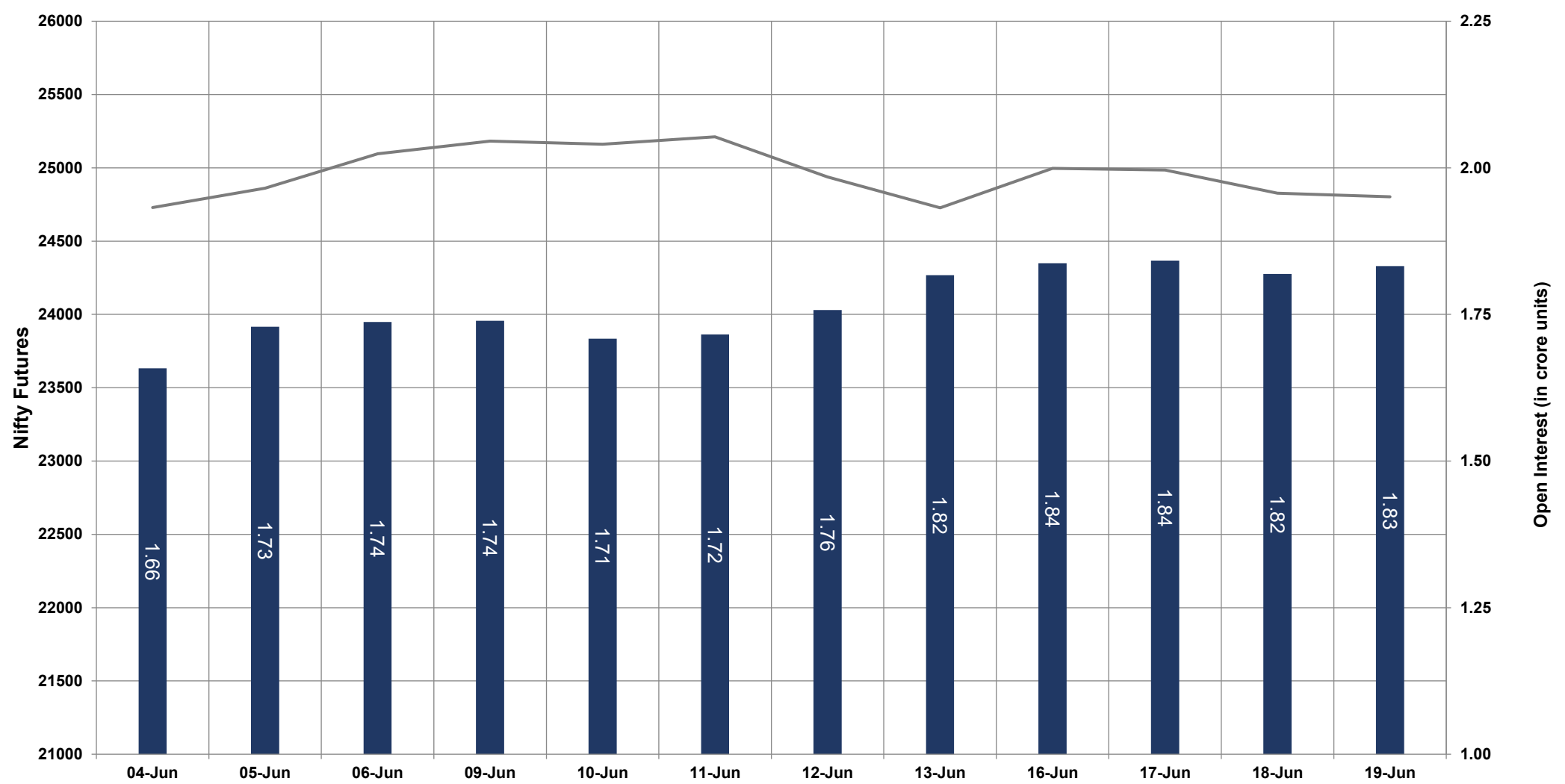


- Nifty Cash = **24793.25 (-0.08%)**
- Resistance levels = **24950** and **25050**
- Support levels = **24650** and **24500**

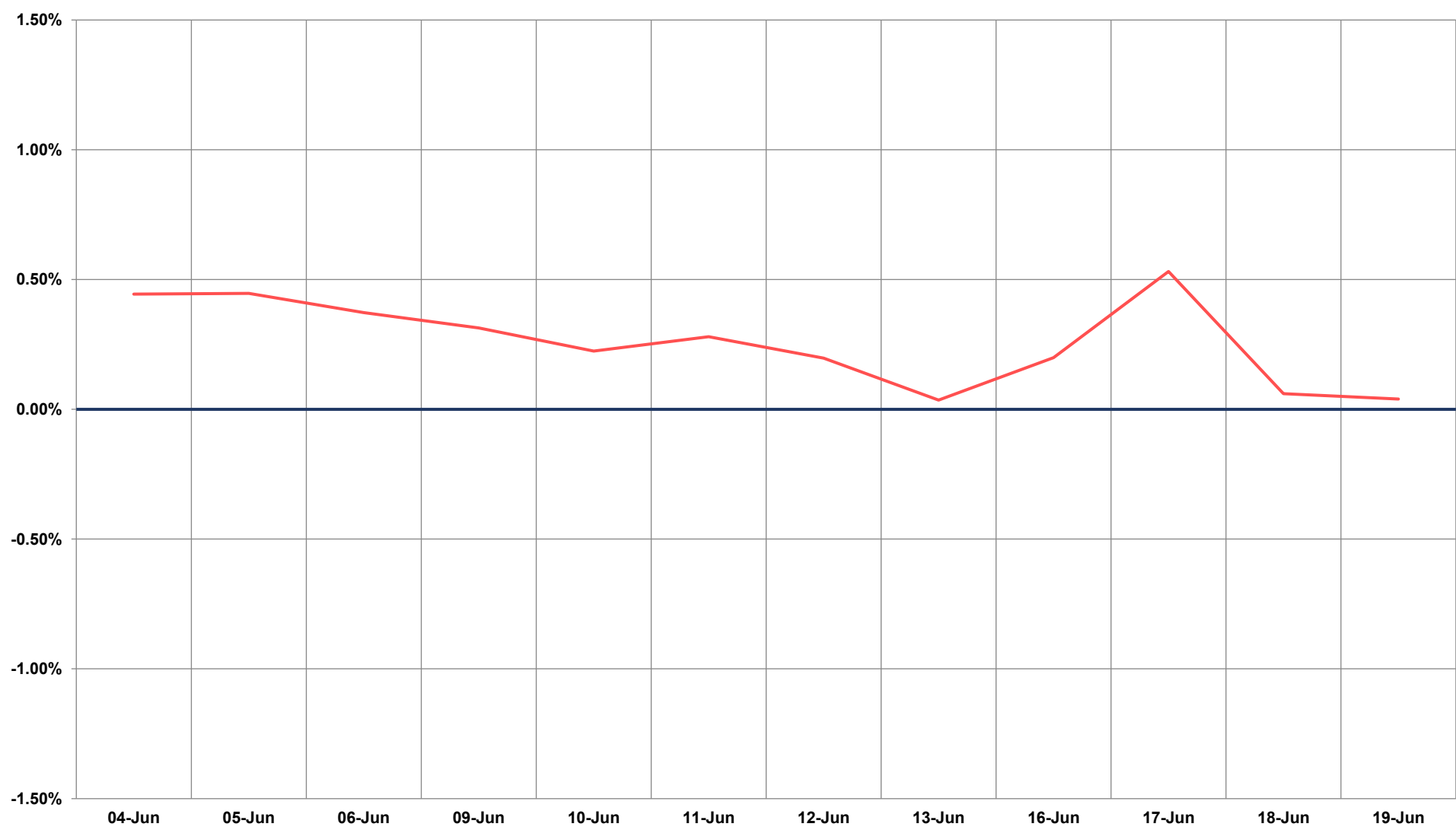
TECHNICAL VIEWS



NIFTY FUTURES



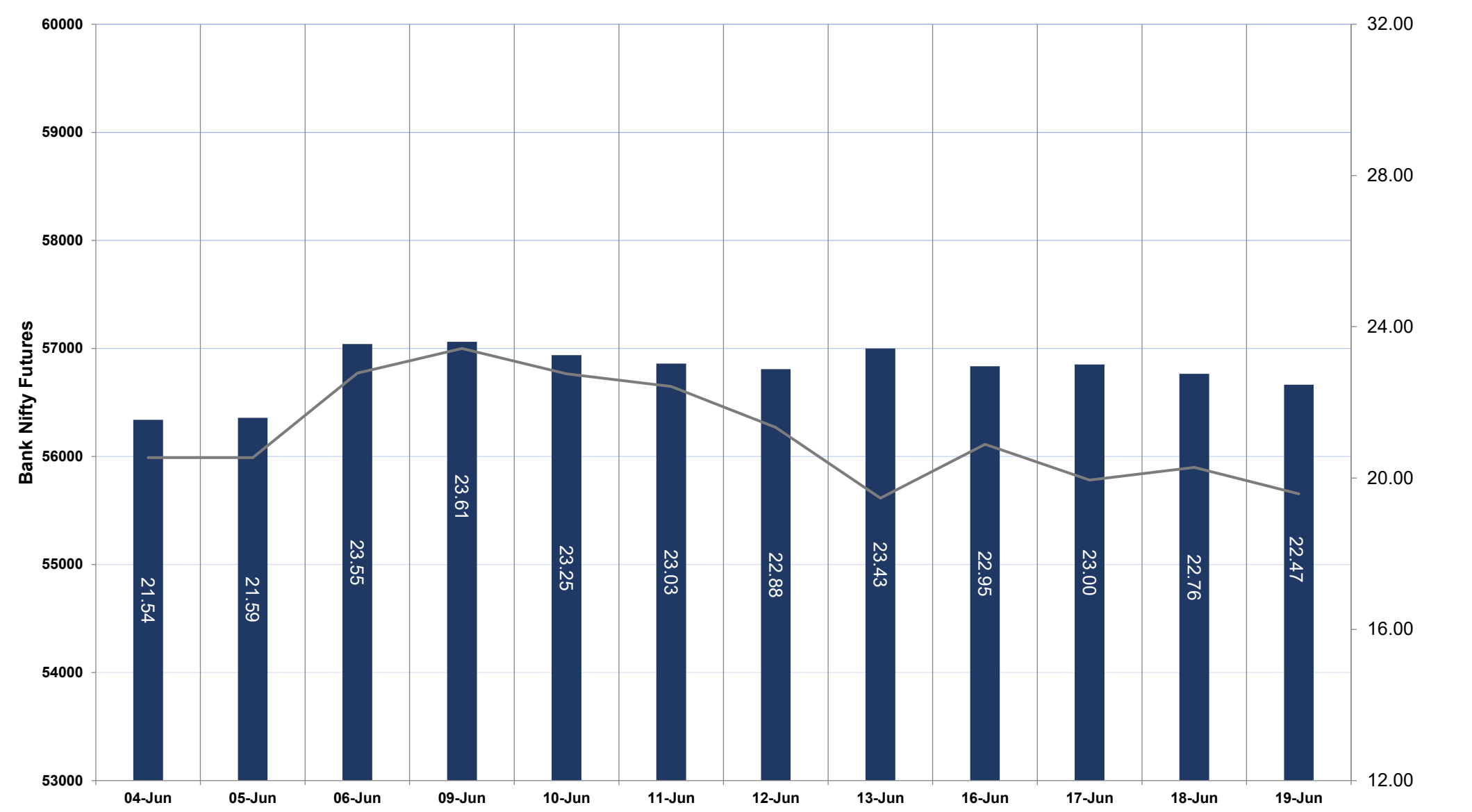
SPREAD: FUTURE & SPOT



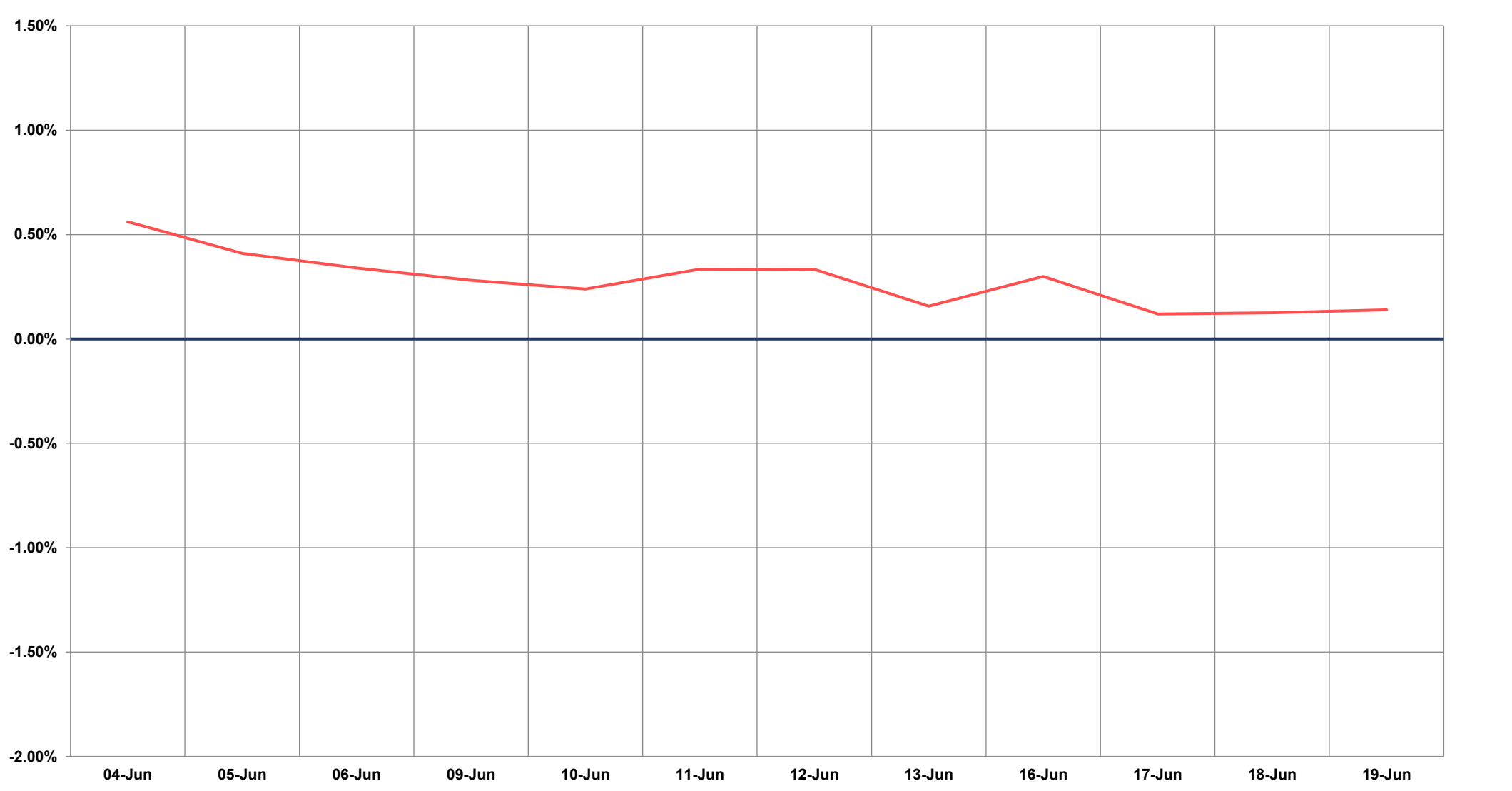
TECHNICAL VIEWS



BANK NIFTY FUTURES

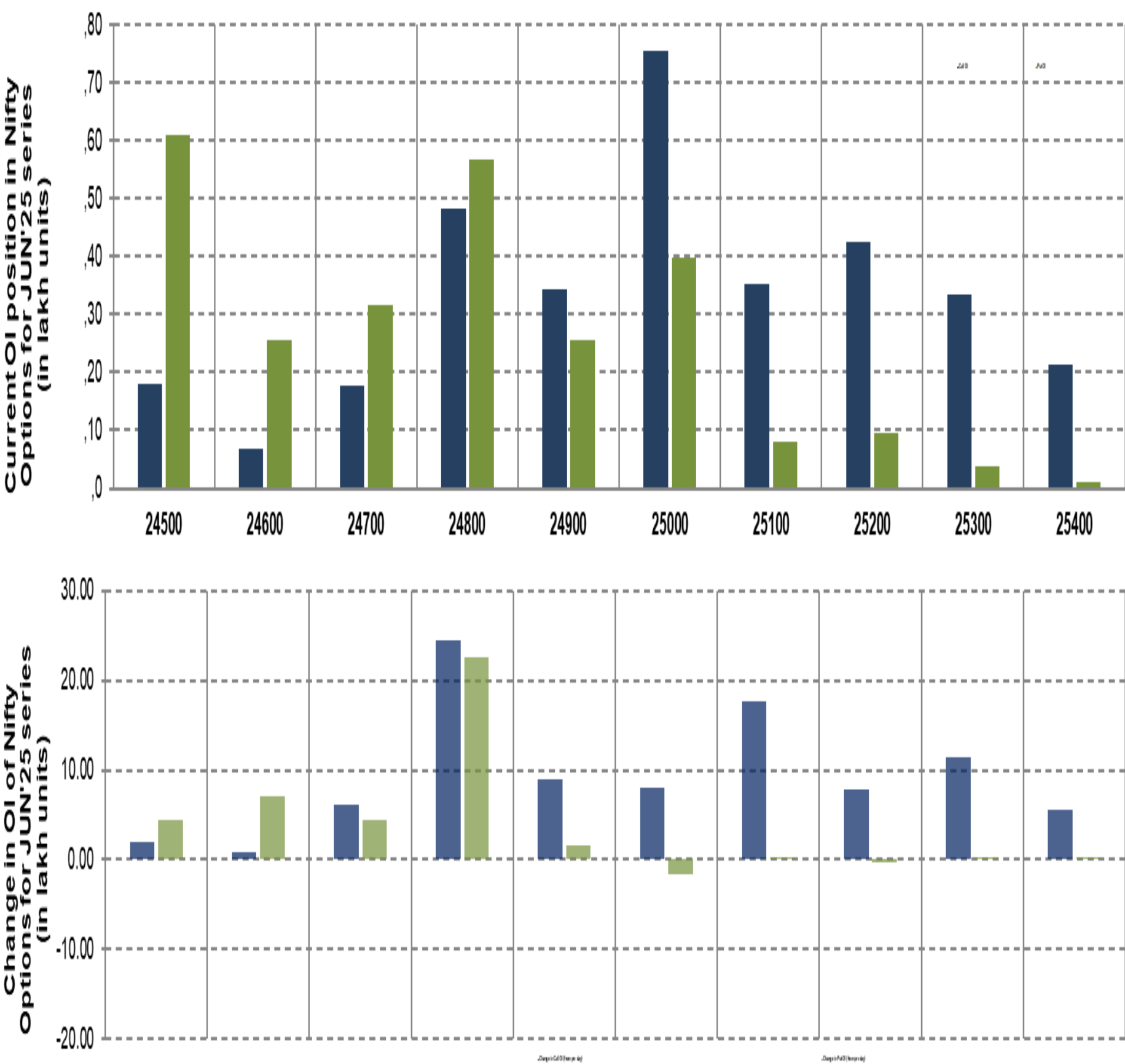


SPREAD: FUTURE & SPOT





NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 2.44 million in Open Interests is **Strike Price of 24800**
- **Most Active Nifty Put** with a addition of 2.26 millions in Open Interests is **Strike Price of 24800**
- **Maximum Open Interest an outstanding** was 7.55 millions for Calls at **Strike Price of 25500**
- **Maximum Open Interest an outstanding** was 6.09 millions for puts at **Strike Price of 24500**

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