



# MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

June 20, 2025



Indian equity benchmarks rebounded sharply on Friday, with both the Nifty and Sensex snapping a three-day losing streak. The rally came after U.S. President Donald Trump announced he would decide within two weeks whether to authorize a direct military strike on Iran. After making a cautious start, soon indices gained traction and traded higher till end of the day, supported by a broad-based rally across sectors. Further, traders took support with exchange data showed Foreign Institutional Investors (FIIs) extended their buying spree for the third consecutive session, purchasing equities worth Rs 934 crore on Thursday.

Some of the important factors in today's trade:

India rises to rank 15 among top global destinations for FDI: Traders got support as United Nations Conference on Trade and Development's (UNCTAD) report stated that India rose a position to rank 15 among top global destinations for foreign direct investment (FDI) in 2024, despite a marginal dip in inflows at \$27.6 billion.

Listed private non-financial companies reports 7.1% sales growth in Jan-Mar: RBI's recent data showed that the sales of listed private non-financial companies grew by 7.1 per cent during January-March quarter of 2024-25 as compared to 8 per cent expansion in the previous quarter and 6.9 per cent during the year.

Goyal says focused on doing trade deals to complement, not compete: Some support also came with Commerce and Industry Minister Piyush Goyal's statement that India is in trade dialogues with countries with whom it doesn't compete but can complement the economies involved.

Global front: European markets were trading in green as traders took some support after the White House said President Donald Trump sees a substantial chance of negotiations and would decide within two weeks whether to authorize a direct U.S. military strike on Iran. Asian markets ended mostly in red on Friday, as People's Bank of China left its benchmark interest rate unchanged after reducing it last month. The central bank maintained its one-year loan prime rate at 3.0 percent.

# MARKET SELFIE



## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	82408.17	1046.30	1.29
NIFTY	25112.40	319.15	1.29
MIDCAP	45480.26	539.07	1.20
SMLCAP	52378.52	284.77	0.55
BSEFMC	20023.29	102.82	-0.42
HEALTHCARE	43081.80	331.47	0.78
AUTO	52934.37	440.37	0.84
POWER	6712.23	96.48	1.46
REALTY	7871.81	170.75	2.22
BSE IT	38171.50	248.18	0.65
BANKEX	63412.19	722.15	1.15
OIL GAS	27053.84	162.87	0.61
METAL	30401.55	329.44	1.10
INDIA VIX	13.67	-0.58	-4.09

## ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1909	961	84
BSE	2411	1545	138

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	7366	5823	27
NSE CASH	159097	90377	76
NSE F&O	227478	149674	52

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	22.57	3.65	1.14
SENSEX	23.05	4.24	1.04

# KEY NUMBERS TRACKER



FII – DII ACTIVITY IN CASH SEGMENT (₹ in Crs)			
FII-DII*	Buy	Sell	Net
DII	22652	26310	(3658)
FII	52121	44417	7704

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)			
FII	Buy	Sell	Net
Ind. Futures	6422.39	6304.64	118
Ind. Options	1193815.89	1216181.51	(22366)
Stk. Futures	40563.05	36159.89	4403
Stk. Options	114729.45	109090.84	5639

PUT-CALL RATIO		
Index	Current	Previous
NIFTY	1.17	0.99
BANK NIFTY	0.92	0.72

DOLLAR INDEX			
Dollar Index	Current	Previous	% Change
DXY	98.77	98.91	-0.13

10-YEARS G-SEC YIELD			
Country	Current	Previous	% Change
INDIA	6.316	6.310	0.06
USA	4.376	4.388	-0.32

KEY COMMODITIES TRACKER (in \$)			
Commodity	Current	Change Points	% Change
Gold	3367.64	-0.95	-0.03
Silver	35.97	-0.42	-1.16
Crude-Oil	73.96	-1.70	-2.25
Brent-Crude	77.22	-1.48	-1.89



# CURRENCY FUTURES & INDEX TRENDS TRACKER



## CURRENCY FUTURES

Expiry	Close	Change Points	% Change
26 JUNE-25 USD-INR	86.67	-0.10	-0.11
26 JUNE-25 EUR-INR	99.86	0.24	0.24
26 JUNE-25 GBP-INR	116.94	0.45	0.39
26 JUNE-25 JPY- INR	59.90	-0.08	-0.13

## INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS

Index	Close	S2	S1	Pivot	R1	R2
NIFTY	25112	24658	24885	25011	25238	25363
SENSEX	82408	80904	81656	82075	82827	83247
NIFTY FUTURES	25112	24688	24900	25018	25230	25349
BANK NIFTY	56253	55287	55770	56049	56532	56811
CNX IT	38991	38242	38617	38829	39204	39416
CNX MIDCAP	57996	56779	57387	57741	58349	58702
CNX SMALLCAP	18194	17831	18012	18123	18305	18416
INDIA VIX	13.67	12.81	13.24	13.75	14.18	14.69

## INDEX TREND ANALYSIS

Index	Daily	Weekly	Monthly
NIFTY	Buy	Buy	Buy
SENSEX	Neutral	Buy	Buy
NIFTY FUTURES	Neutral	Buy	Buy
BANK NIFTY	Buy	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 23-06-2025

**ABFRL, BIOCON, RBLBANK, TITAGARH**

# TECHNICAL VIEWS



## NIFTY

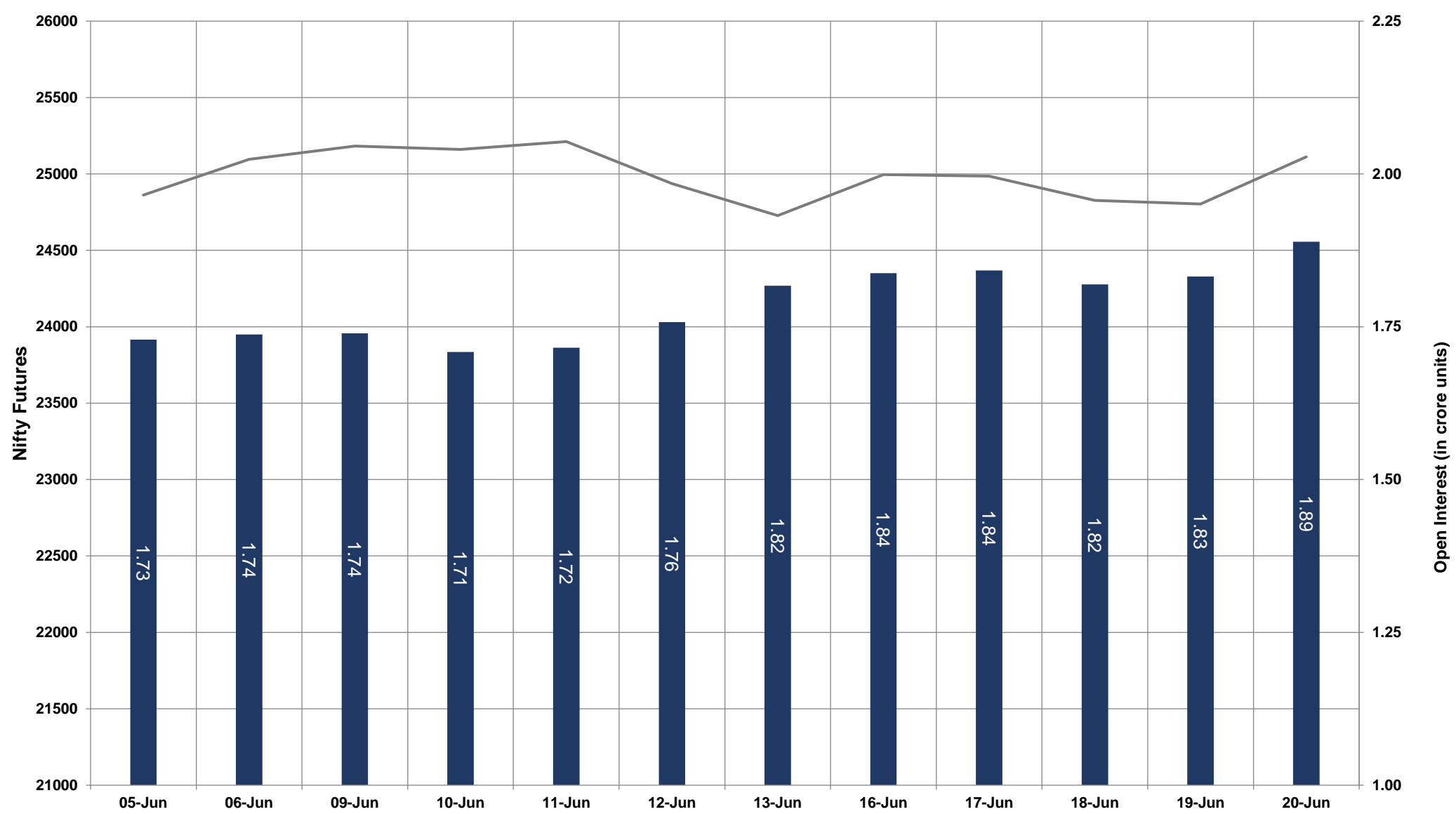


- Nifty Cash = **25112.40 (1.29%)**
- Resistance levels = **25300** and **25430**
- Support levels = **24950** and **24800**

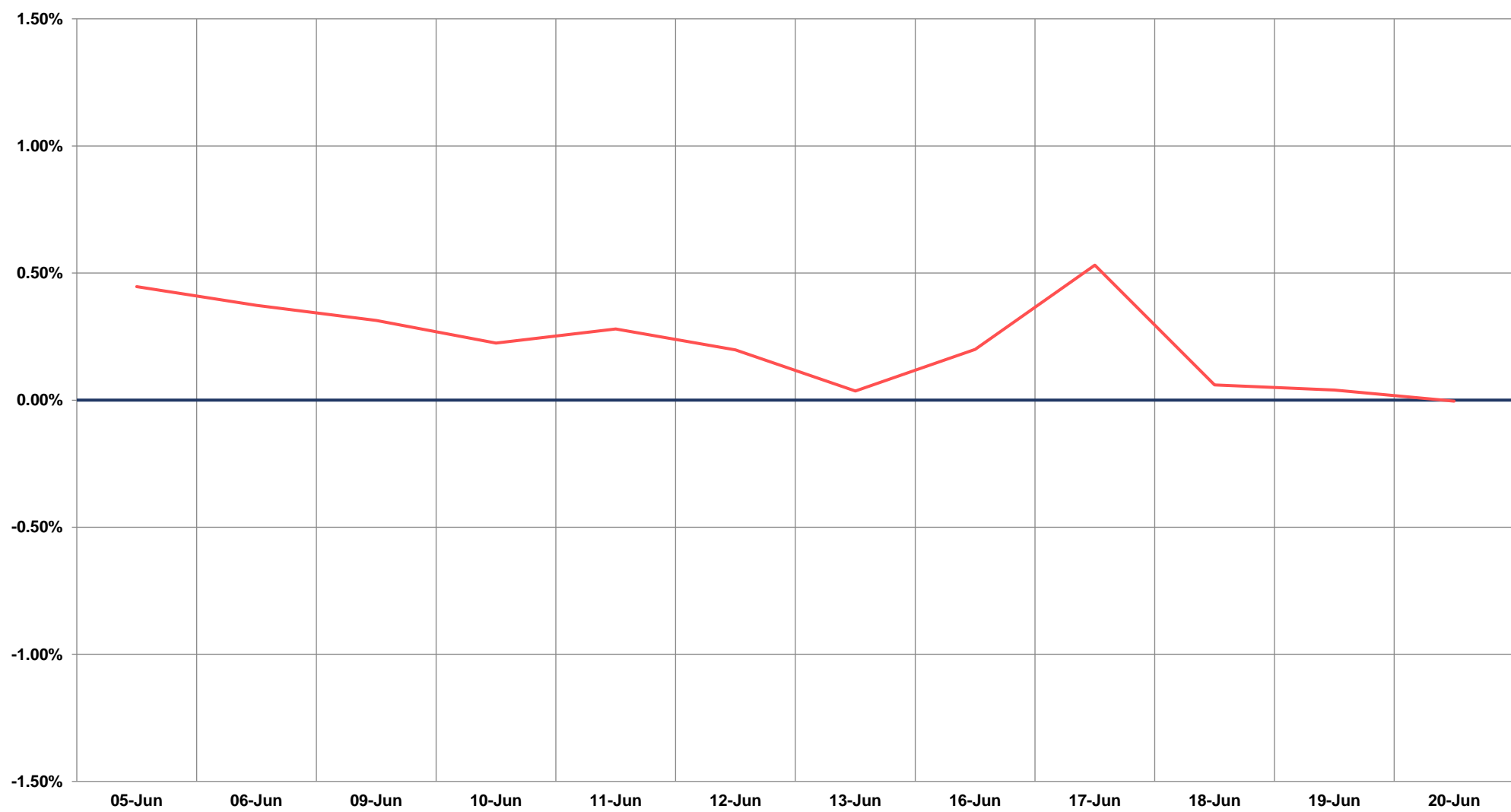
# TECHNICAL VIEWS



## NIFTY FUTURES



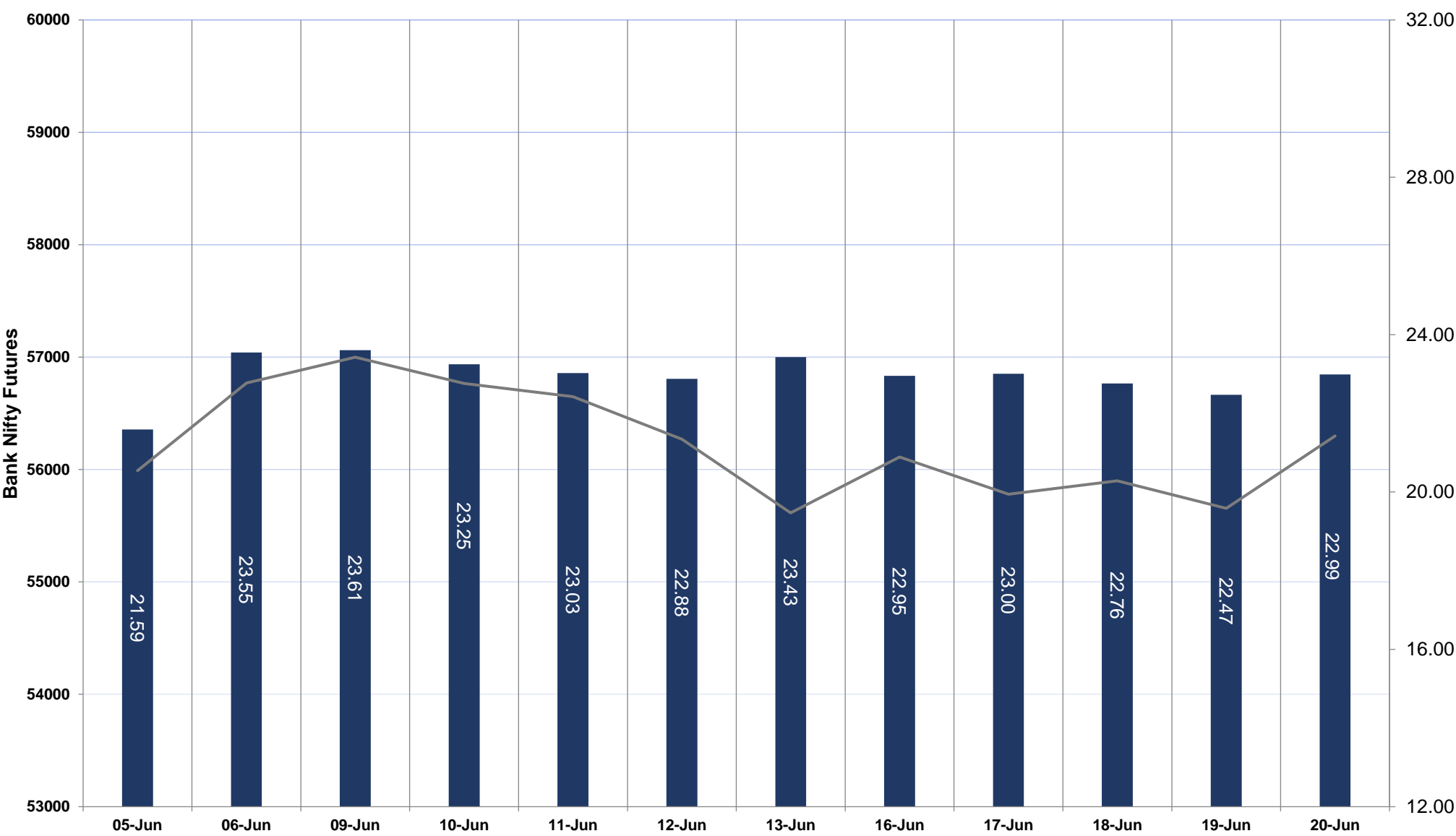
## SPREAD: FUTURE & SPOT



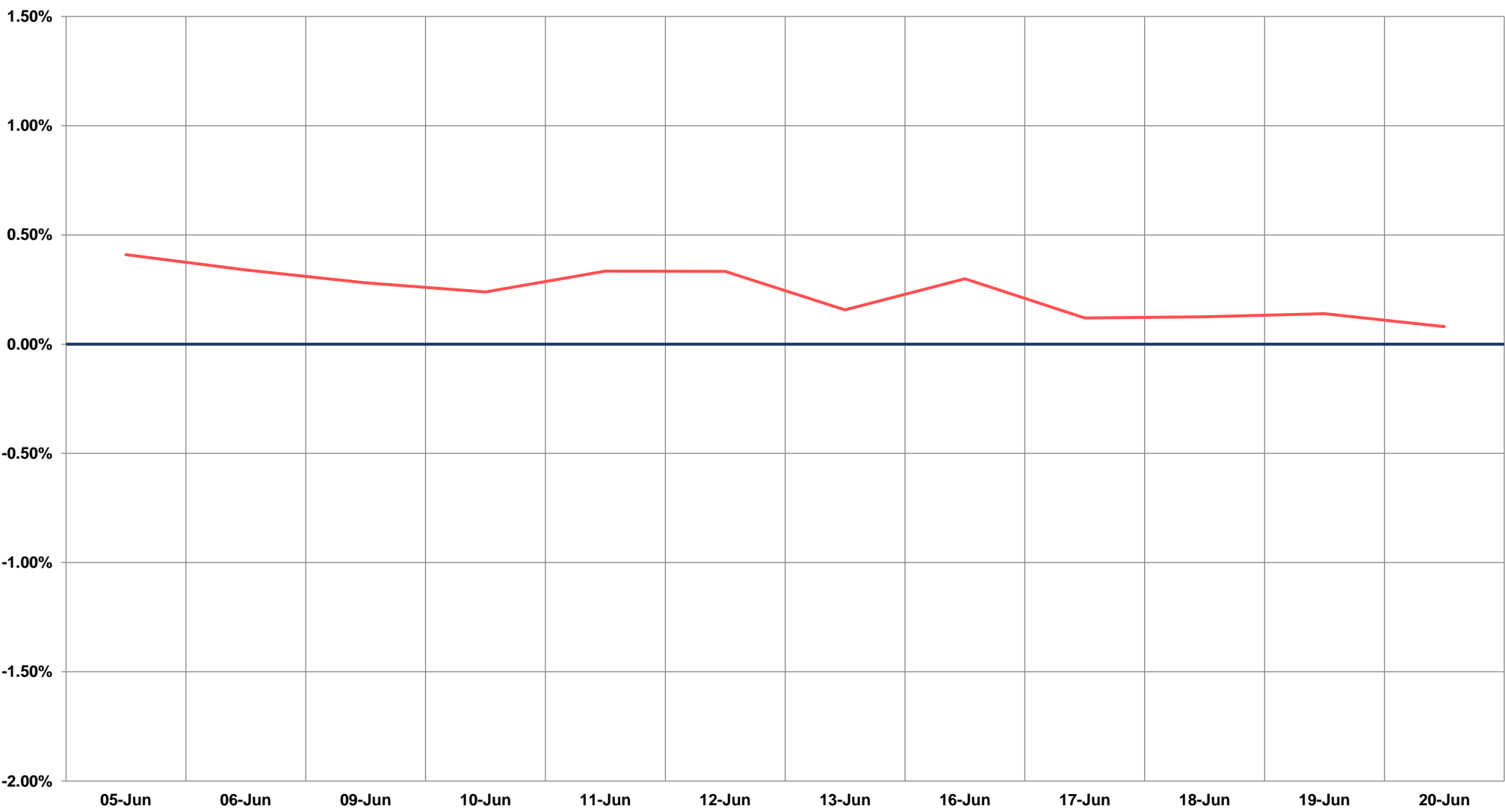
# TECHNICAL VIEWS



## BANK NIFTY FUTURES



## SPREAD: FUTURE & SPOT

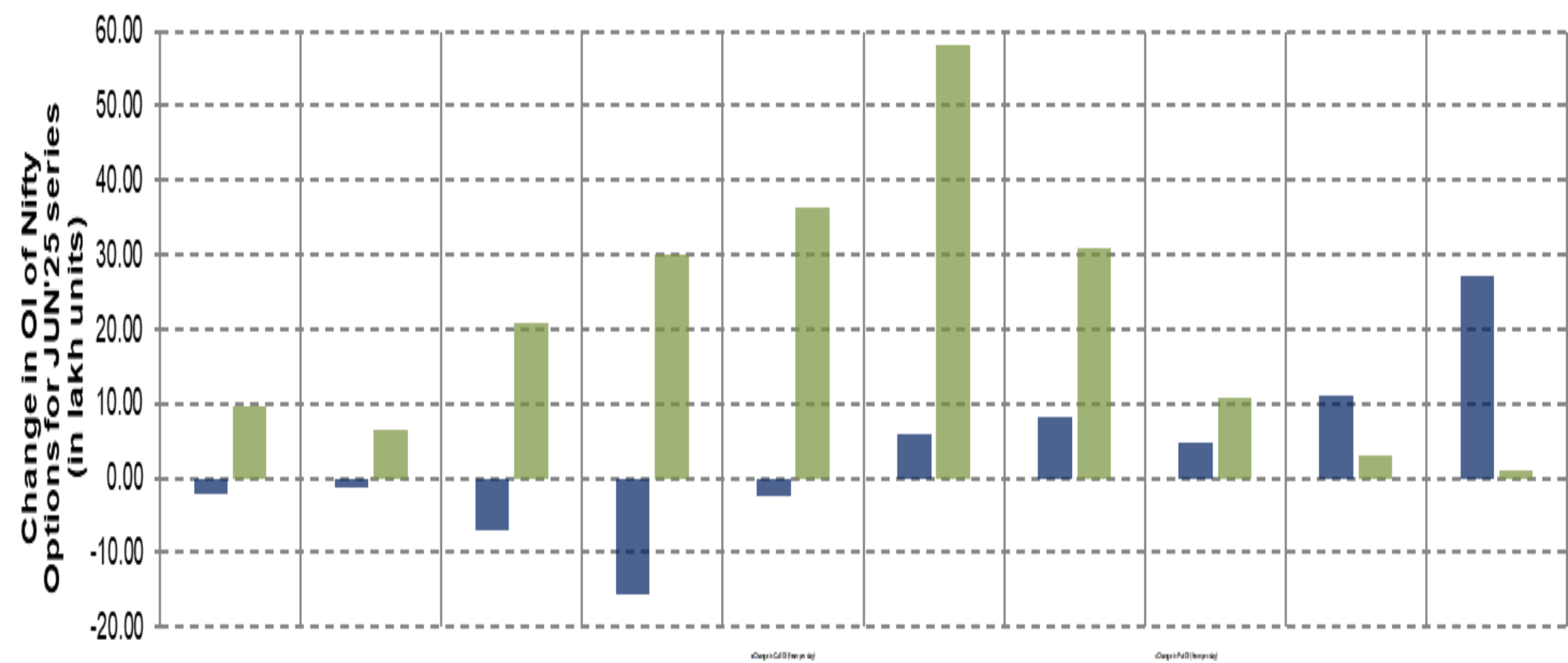
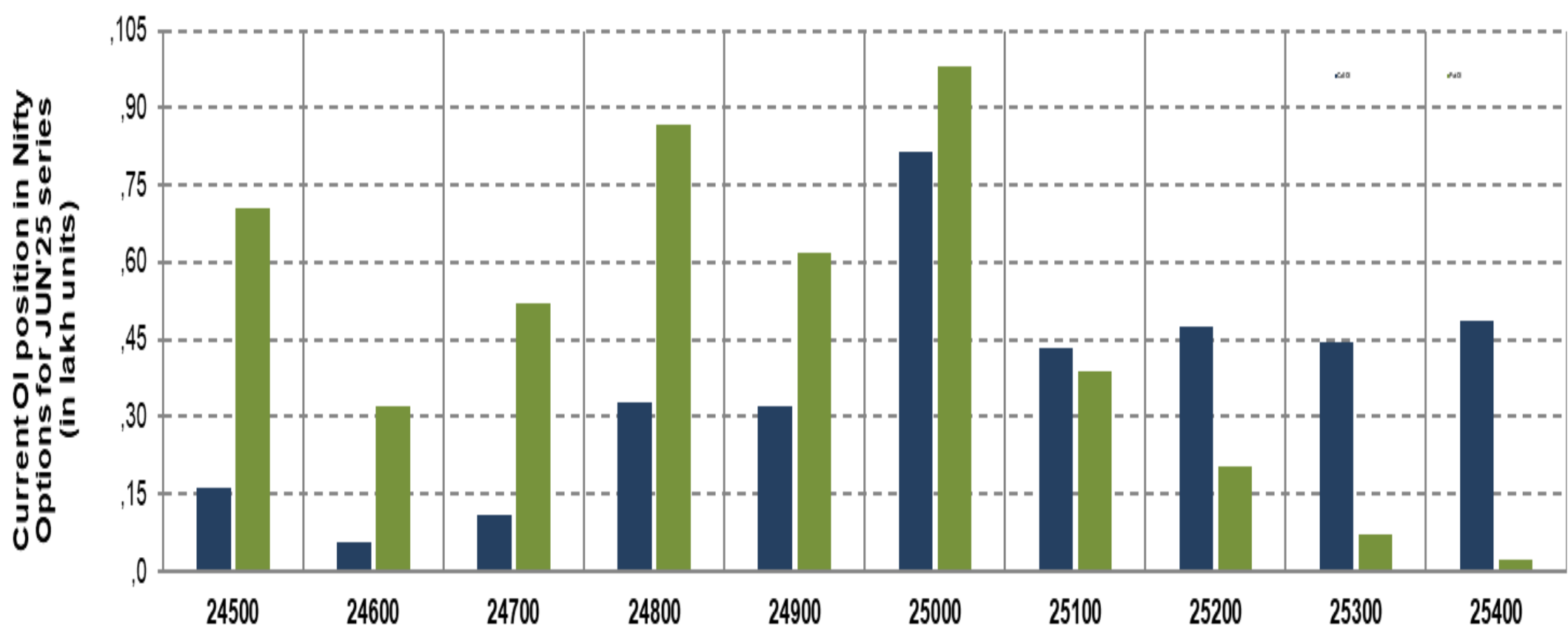




# TECHNICAL VIEWS



## NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 2.72 million in Open Interests is **Strike Price of 25400**
- **Most Active Nifty Put** with a addition of 5.82 millions in Open Interests is **Strike Price of 25000**
- **Maximum Open Interest an outstanding** was 8.14 millions for Calls at **Strike Price of 25000**
- **Maximum Open Interest an outstanding** was 9.79 millions for puts at **Strike Price of 25000**

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