



# MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

June 23, 2025



Indian equity benchmarks ended in negative terrain on Monday, with both the Nifty and Sensex closing over half-percent cut, weighed down by broad-based selling across sectors. IT and Auto stocks were among the top losers. Indices made a gap-down opening, tracking weak global cues amid escalation in the middle-east conflict after the U.S. joined Israel in the weeks-long war with Iran, with US carrying out a ‘successful’ airstrike on three nuclear sites in Iran over the weekend. In afternoon session, markets trimmed most their losses, but ended in red.

Some of the important factors in today’s trade:

Net direct tax collection slips 1.39% to Rs 4.59 lakh crore so far in FY26: Traders were concerned as Government data showed that net direct tax collection so far this fiscal year dropped 1.39 per cent to Rs 4.59 lakh crore, on slowdown in advance tax mop-up and higher refunds.

Output of eight key infrastructure sectors slows to 0.7% in May: Traders remained cautious as the Ministry of Commerce & Industry in its latest data showed that the output of eight key infrastructure sectors slowed down to 0.7 per cent, lowest in nine months, in May 2025 against 6.9 per cent in the same month last year.

India’s flash PMI indicates strong growth in June: Traders overlooked India’s flash PMI indicated strong growth in the month of June, as new export orders continued to fuel private sector business activity, especially in manufacturing.

Global front: European markets were trading in red as investors waited for Iran's response to the weekend US air strikes on its nuclear sites. Asian markets ended mostly in red on Monday, dragged by concerns over the ongoing tension in the Middle East region.

# MARKET SELFIE



## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	81896.79	-511.38	-0.62
NIFTY	24971.90	-140.50	-0.56
MIDCAP	45571.69	91.43	0.20
SMLCAP	52678.74	300.22	0.57
BSEFMC	19898.38	-124.91	-0.62
HEALTHCARE	43037.85	-43.95	-0.10
AUTO	52464.47	-466.90	-0.88
POWER	6700.87	-11.36	-0.17
REALTY	7856.50	-15.31	-0.19
BSE IT	37613.94	-557.56	-1.46
BANKEX	63174.33	-237.86	-0.38
OIL GAS	27134.01	80.17	0.30
METAL	30616.44	214.89	0.71
INDIA VIX	14.04	0.37	2.71

## ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1363	1544	88
BSE	1788	2273	179

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	8228	7366	12
NSE CASH	90775	159097	(43)
NSE F&O	407339	227478	79

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	22.44	3.63	1.13
SENSEX	23.45	4.36	0.97

# KEY NUMBERS TRACKER



FII – DII ACTIVITY IN CASH SEGMENT (₹ in Crs)			
FII-DII*	Buy	Sell	Net
DII	10951	7723	3229
FII	8393	10371	(1977)

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)			
FII	Buy	Sell	Net
Ind. Futures	6223.73	7398.09	(1174)
Ind. Options	1192191.59	1178545.56	13646
Stk. Futures	146676.65	146988.54	(312)
Stk. Options	111337.48	106317.69	5020

PUT-CALL RATIO		
Index	Current	Previous
NIFTY	1.05	1.17
BANK NIFTY	0.93	0.92

DOLLAR INDEX			
Dollar Index	Current	Previous	% Change
DXY	99.31	98.71	0.61

10-YEARS G-SEC YIELD			
Country	Current	Previous	% Change
INDIA	6.308	6.316	-0.13
USA	4.318	4.376	-1.30

KEY COMMODITIES TRACKER (in \$)			
Commodity	Current	Change Points	% Change
Gold	3381.45	13.80	0.40
Silver	36.23	0.25	0.71
Crude-Oil	73.52	-0.45	-0.62
Brent-Crude	76.68	-0.54	-0.74

# CURRENCY FUTURES & INDEX TRENDS TRACKER



## CURRENCY FUTURES

Expiry	Close	Change Points	% Change
26 JUNE-25 USD-INR	86.78	0.12	0.13
26 JUNE-25 EUR-INR	99.86	1.56	1.58
26 JUNE-25 GBP-INR	116.35	-0.34	-0.29
26 JUNE-25 JPY- INR	58.82	-1.07	-1.79

## INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS

Index	Close	S2	S1	Pivot	R1	R2
NIFTY	24972	24719	24846	24951	25078	25183
SENSEX	81897	81155	81526	81848	82219	82541
NIFTY FUTURES	24993	24704	24849	24969	25114	25234
BANK NIFTY	56059	55570	55815	56024	56269	56478
CNX IT	38414	38079	38246	38446	38614	38814
CNX MIDCAP	58207	57209	57708	58036	58535	58863
CNX SMALLCAP	18321	17950	18136	18242	18427	18533
INDIA VIX	14.05	13.22	13.63	14.08	14.49	14.94

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

## SECURITIES BAN IN F&O TRADES FOR 24-06-2025

<p><b>BIOCON, RBLBANK</b></p>	
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# TECHNICAL VIEWS



## NIFTY

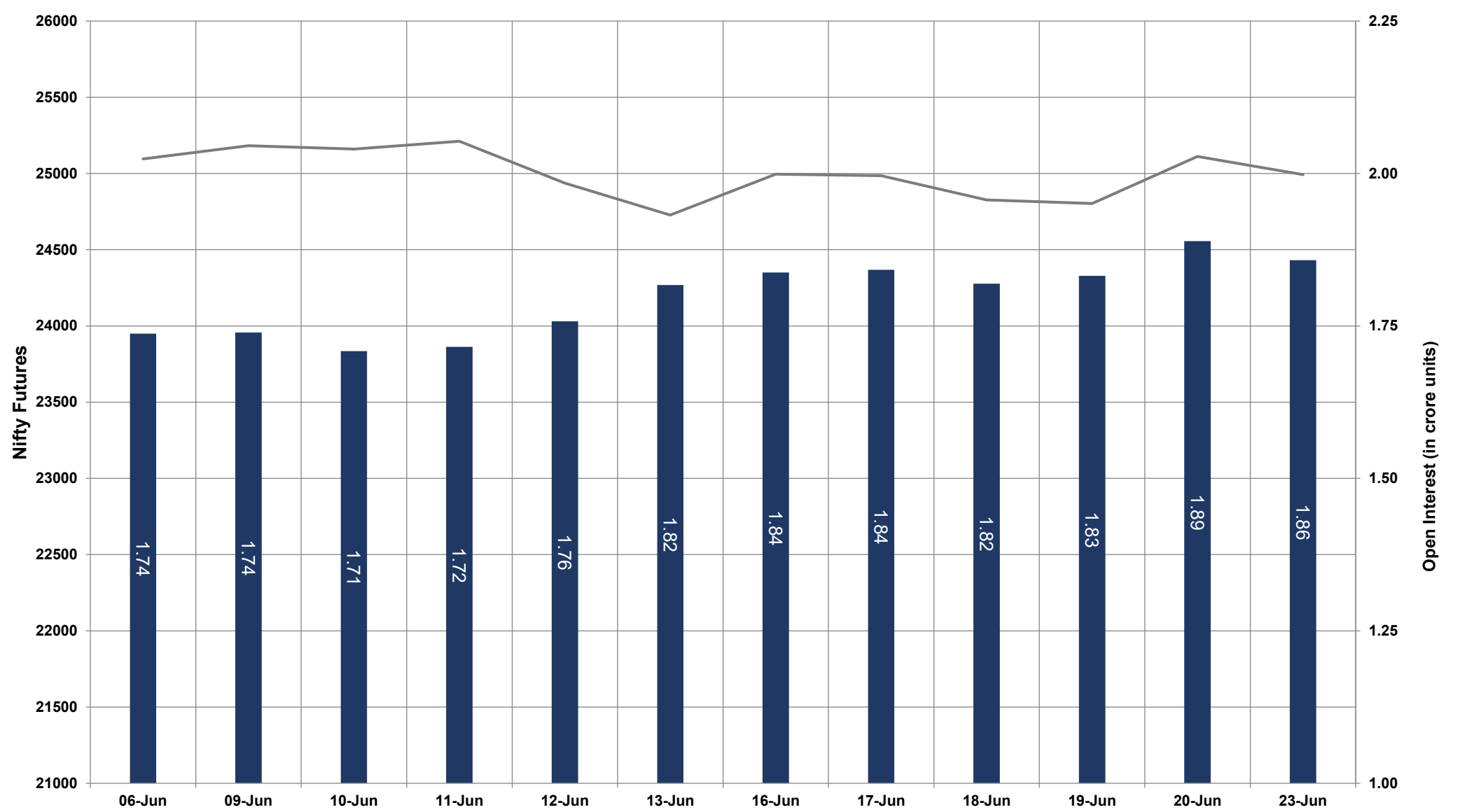


- Nifty Cash = **24971.90 (-0.56%)**
- Resistance levels = **25200** and **25350**
- Support levels = **24800** and **24650**

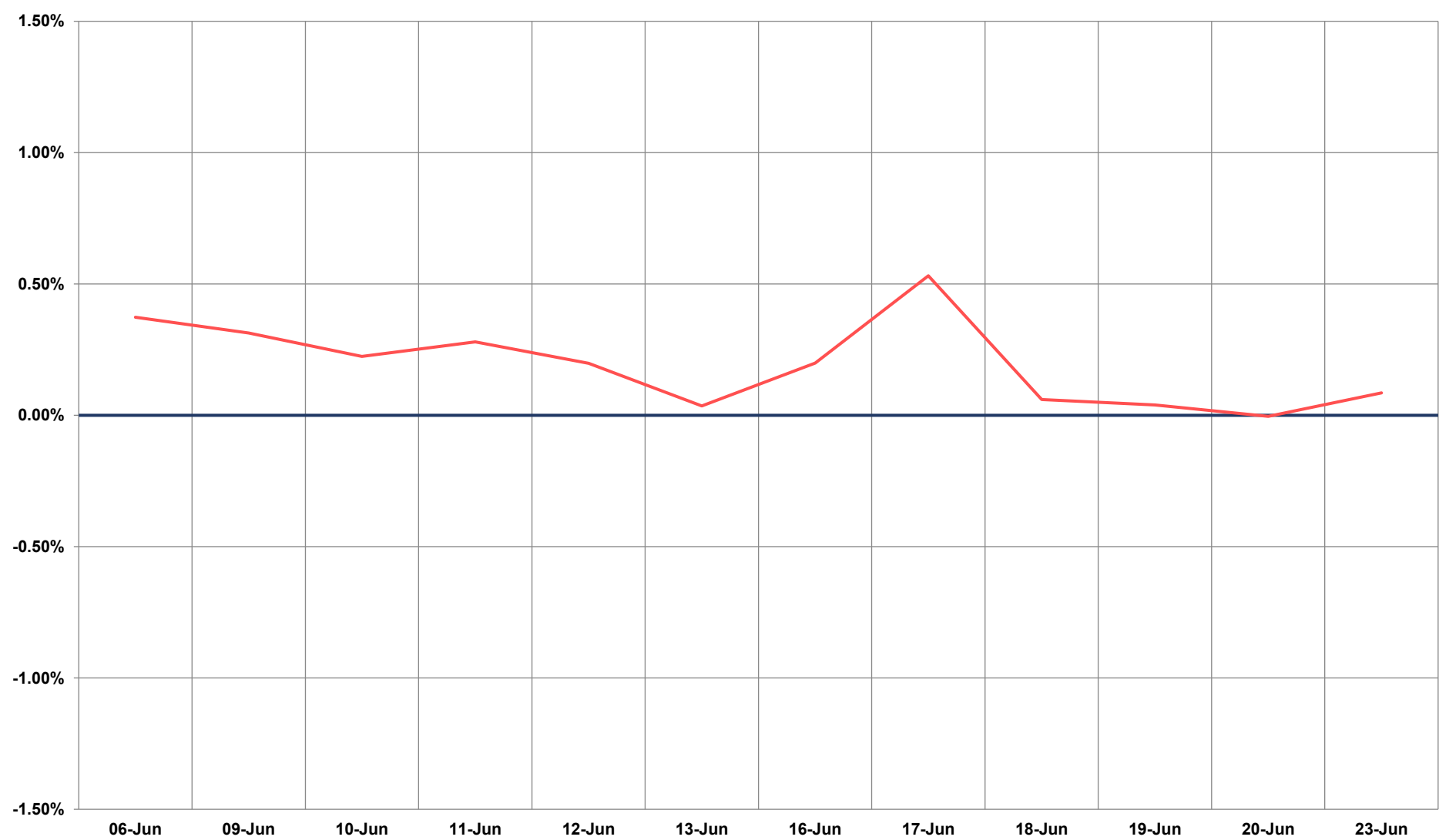
# TECHNICAL VIEWS



## NIFTY FUTURES



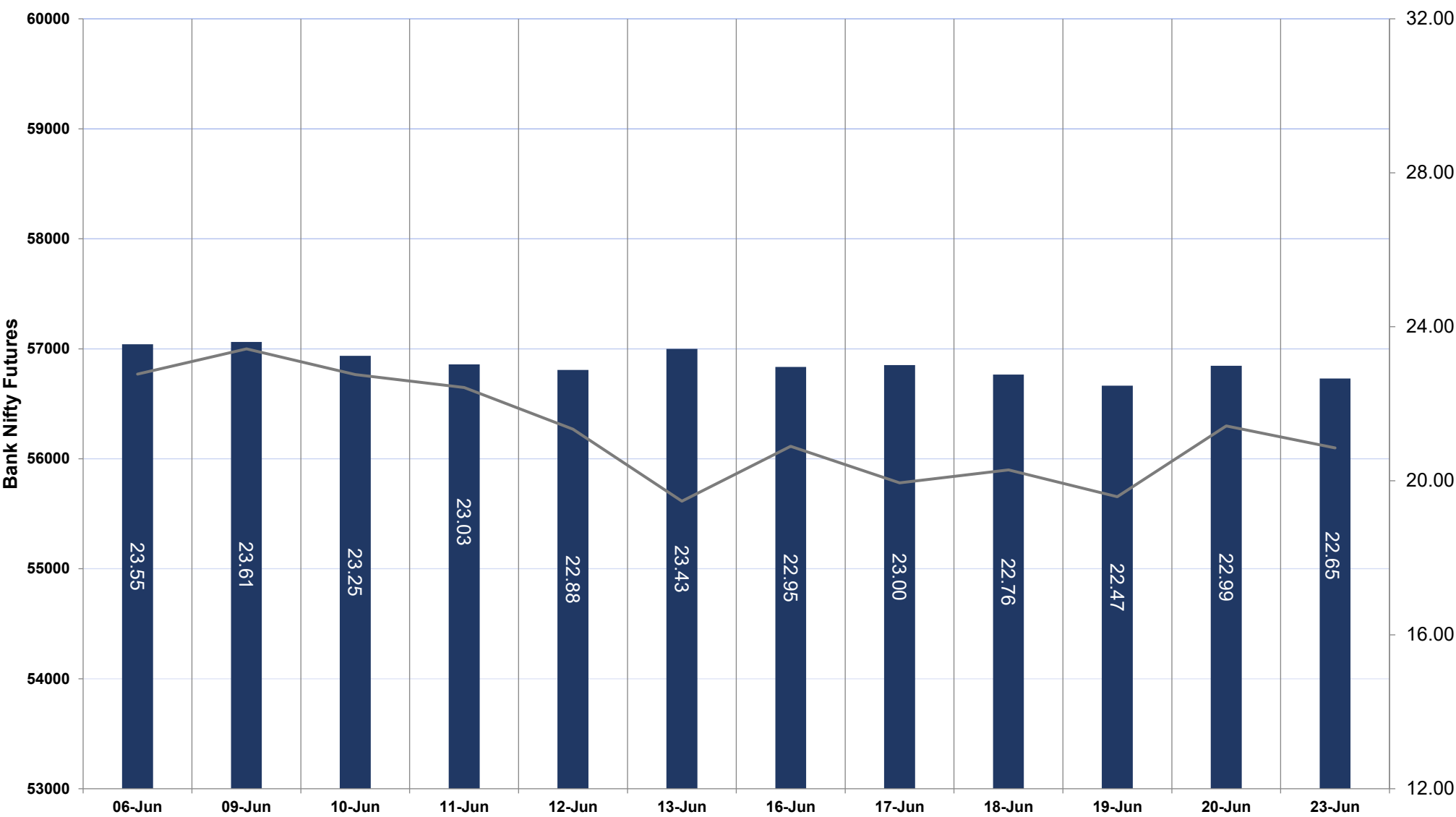
## SPREAD: FUTURE & SPOT



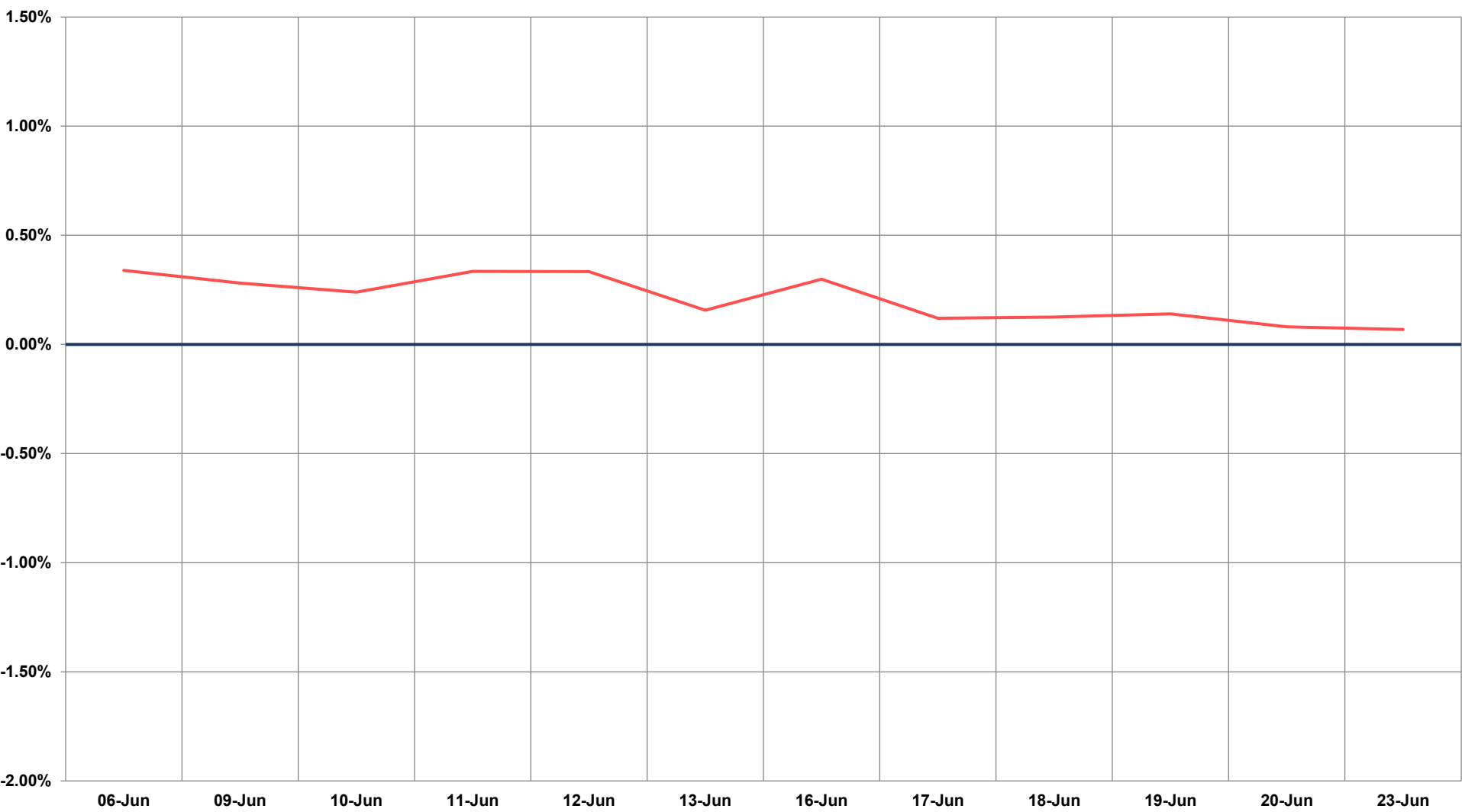
# TECHNICAL VIEWS



## BANK NIFTY FUTURES



## SPREAD: FUTURE & SPOT

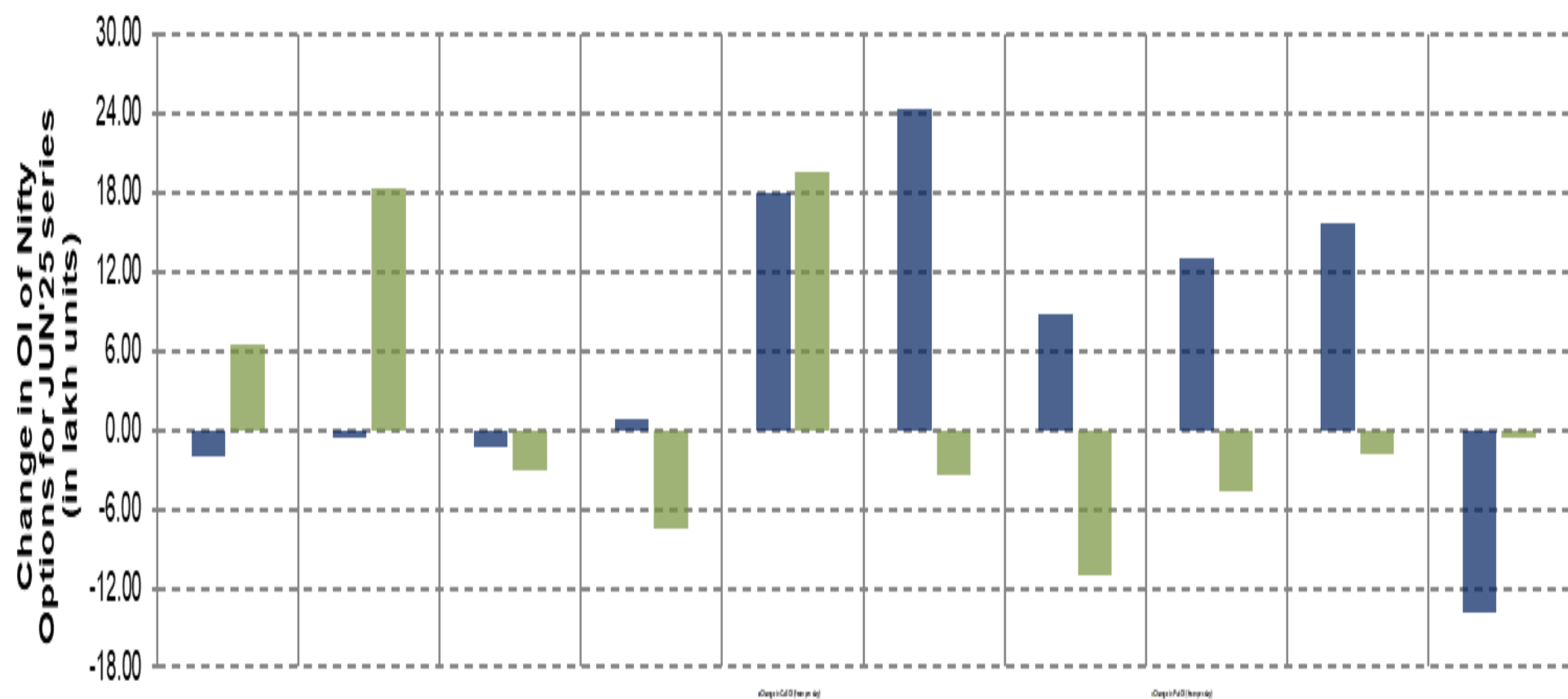
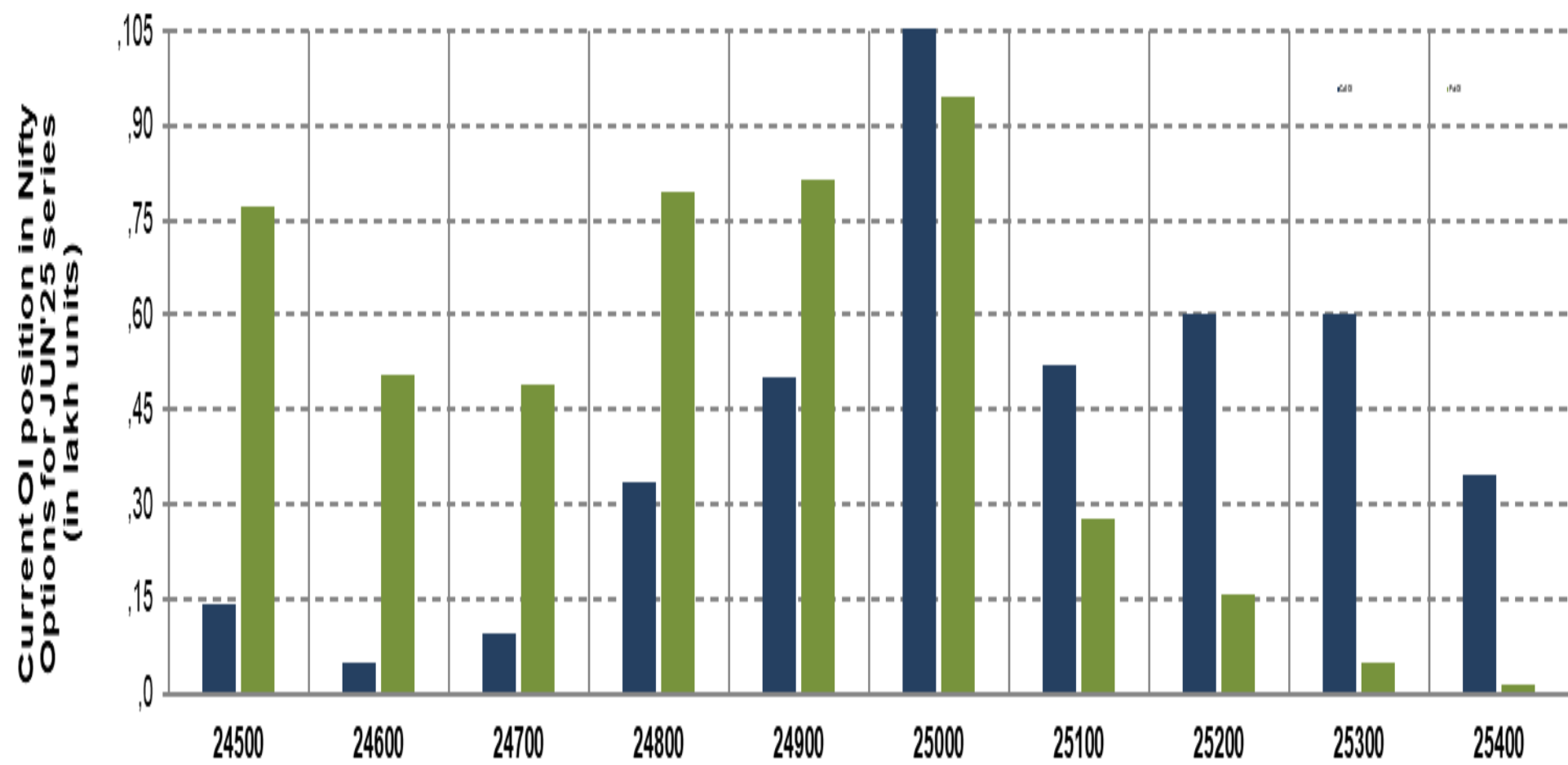




# TECHNICAL VIEWS



## NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 2.43 million in Open Interests is **Strike Price of 25000**
- **Most Active Nifty Put** with a addition of 1.95 millions in Open Interests is **Strike Price of 24900**
- **Maximum Open Interest an outstanding** was 10.57 millions for Calls at **Strike Price of 25000**
- **Maximum Open Interest an outstanding** was 9.45 millions for puts at **Strike Price of 25000**

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