



# MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

June 24, 2025



Indian equity benchmarks ended in positive territory with modest gains on Tuesday, supported by buying in stocks including Adani Enterprises and Adani Ports and Tata Steel. Indices made a gap-up opening and traded near their intra-day high points in early trade, after US President Donald Trump announced that Israel and Iran have agreed to a ceasefire. However, gains were trimmed in the afternoon session, as traders turned cautious following reports that Israel has accused Iran of violating the ceasefire agreement. But markets managed to close in positive territory.

Some of the important factors in today's trade:

S&P raises India's GDP forecast to 6.5% for FY26: Sentiments remained up-beat as S&P Global Ratings raised India's Gross Domestic Product (GDP) forecast for current fiscal to 6.5 per cent assuming a normal monsoon, lower crude oil prices, income-tax concessions and monetary easing.

India, US trying to finalise interim trade deal before July 9: Traders took some support as India and the US are reportedly engaged in negotiations for an interim trade deal and are trying to finalise the pact before July 9.

Government holds extensive consultations on FTAs to safeguard industry interests: Traders took note of Commerce and Industry Minister Piyush Goyal's statement that the government holds extensive stakeholder consultations on the free trade agreements (FTAs) and is pursuing these pacts while keeping in mind the interests of the domestic industry.

Global front: European markets were trading in green after German business morale improved more than expected in June amid improvement in companies' future prospects. Asian markets ended mostly in green after US President Donald Trump announced that Iran and Israel have agreed to a ceasefire.

# MARKET SELFIE



## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	82055.11	158.32	0.19
NIFTY	25044.35	72.45	0.29
MIDCAP	45818.41	246.72	0.54
SMLCAP	53053	374.26	0.71
BSEFMC	19969.84	71.46	0.36
HEALTHCARE	43114.73	76.88	0.18
AUTO	52793.59	326.12	0.62
POWER	6737.96	37.09	0.55
REALTY	7869.07	12.57	0.16
BSE IT	37573.99	-39.95	-0.11
BANKEX	63631.36	457.03	0.72
OIL GAS	27087.81	-46.20	-0.17
METAL	30910.39	293.95	0.96
INDIA VIX	13.64	-0.41	-2.92

## ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1963	917	96
BSE	2615	1385	144

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	11364	8228	38
NSE CASH	111594	90775	23
NSE F&O	473856	407339	16

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	22.51	3.64	1.12
SENSEX	23.49	4.37	0.97

# KEY NUMBERS TRACKER



FII – DII ACTIVITY IN CASH SEGMENT (₹ in Crs)			
FII-DII*	Buy	Sell	Net
DII	13936	9633	4303
FII	13084	16057	(2973)

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)			
FII	Buy	Sell	Net
Ind. Futures	12646.69	14104.46	(1458)
Ind. Options	2071072.05	2102876.98	(31805)
Stk. Futures	146172.44	144165.29	2007
Stk. Options	118299.13	115664.19	2635

PUT-CALL RATIO		
Index	Current	Previous
NIFTY	0.86	1.05
BANK NIFTY	0.92	0.93

DOLLAR INDEX			
Dollar Index	Current	Previous	% Change
DXY	97.88	-0.54	-0.55

10-YEARS G-SEC YIELD			
Country	Current	Previous	% Change
INDIA	6.247	6.308	-0.97
USA	4.299	4.318	-0.46

KEY COMMODITIES TRACKER (in \$)			
Commodity	Current	Change Points	% Change
Gold	3319.70	-24.48	-0.73
Silver	35.75	-0.12	-0.33
Crude-Oil	64.37	-2.80	-4.20
Brent-Crude	67.15	-2.96	-4.14



# CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES			
Expiry	Close	Change Points	% Change
26 JUNE-25 USD-INR	86.05	-0.74	-0.85
26 JUNE-25 EUR-INR	99.94	0.37	0.37
26 JUNE-25 GBP-INR	117.20	1.02	0.87
26 JUNE-25 JPY- INR	59.52	0.52	0.89

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS						
Index	Close	S2	S1	Pivot	R1	R2
NIFTY	25044	24803	24923	25121	25241	25439
SENSEX	82055	81206	81631	82324	82749	83443
NIFTY FUTURES	25072	24840	24956	25152	25268	25465
BANK NIFTY	56462	55948	56205	56533	56791	57119
CNX IT	38418	38022	38220	38578	38776	39135
CNX MIDCAP	58622	58249	58436	58674	58861	59100
CNX SMALLCAP	18453	18333	18393	18472	18532	18610
INDIA VIX	13.64	12.73	13.19	13.76	14.22	14.79

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	Buy	Buy	Buy
INDIA VIX	Sell	Neutral	Neutral

SECURITIES BAN IN F&O TRADES FOR 25-06-2025
TITAGARH

# TECHNICAL VIEWS



## NIFTY

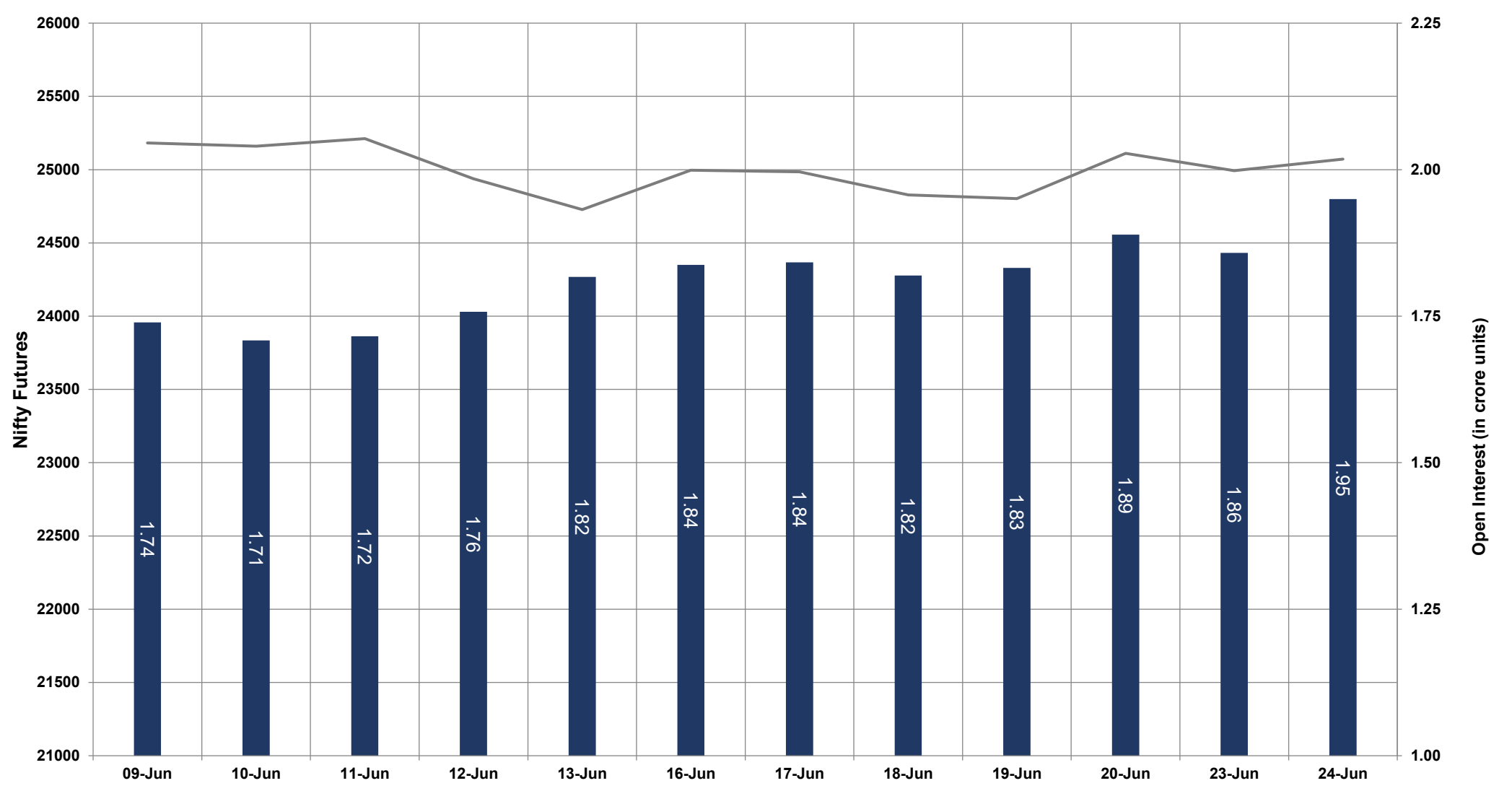


- Nifty Cash = **25044.35 (0.29%)**
- Resistance levels = **25250** and **25350**
- Support levels = **24950** and **24800**

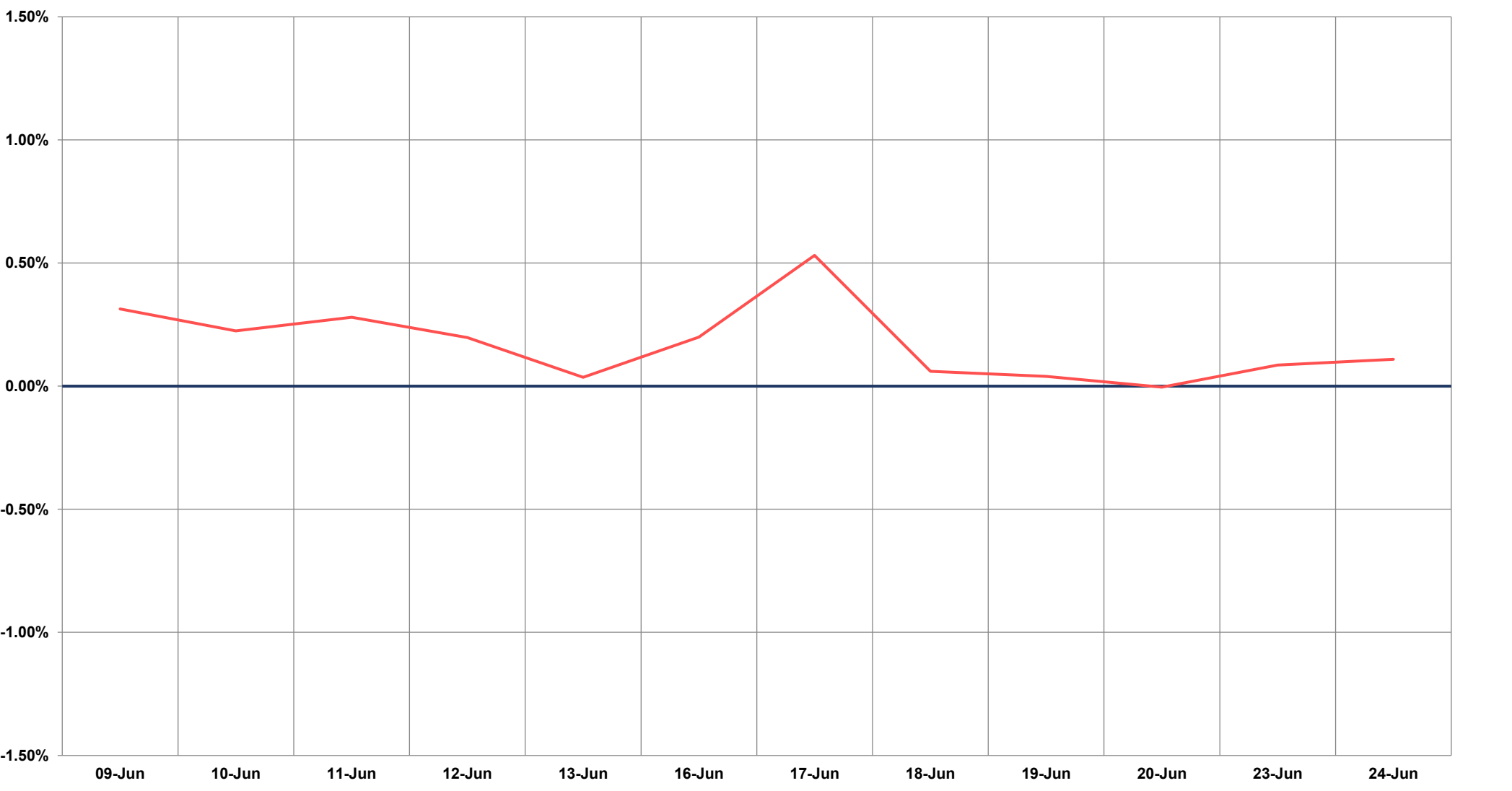
# TECHNICAL VIEWS



## NIFTY FUTURES



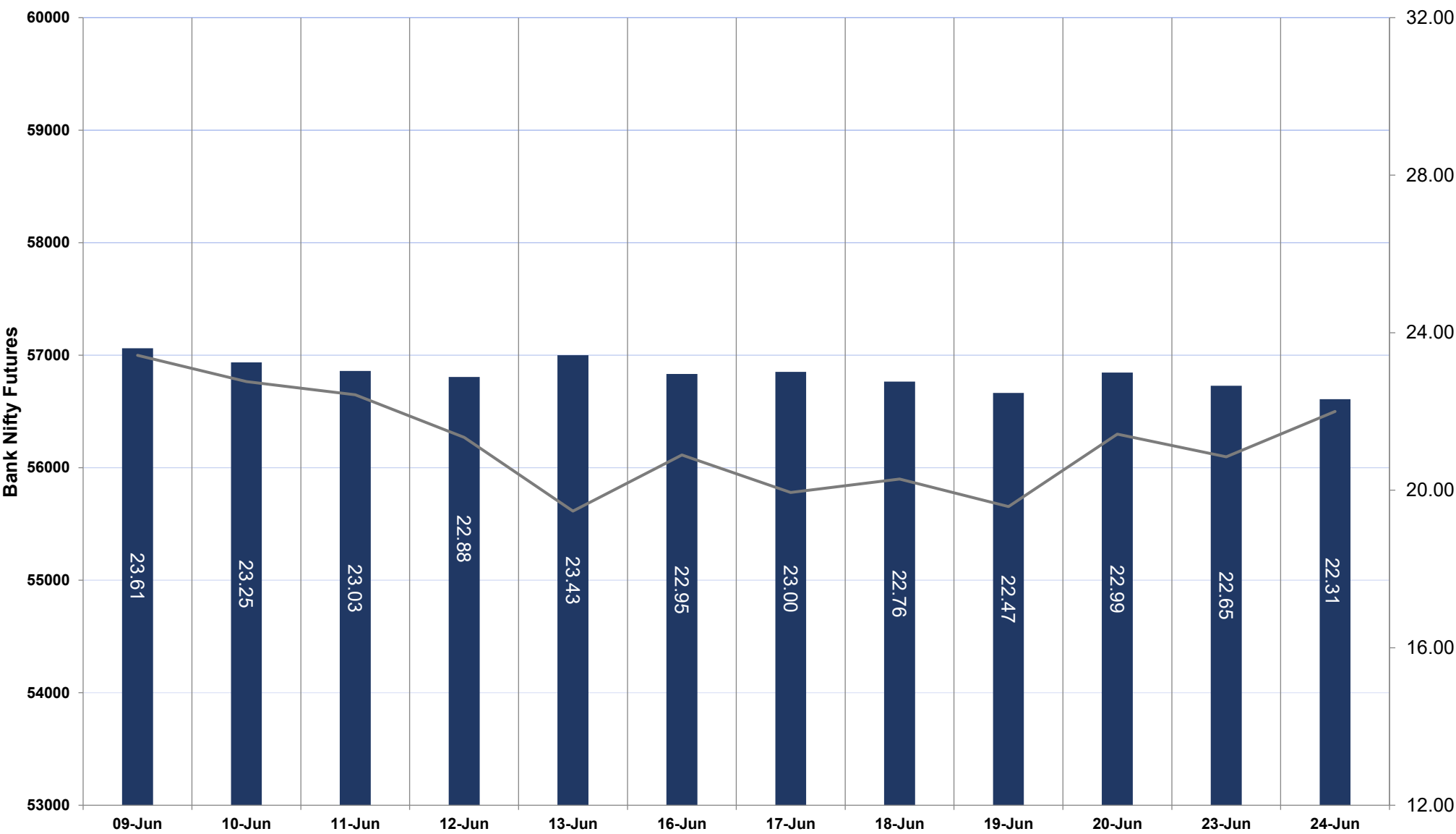
## SPREAD: FUTURE & SPOT



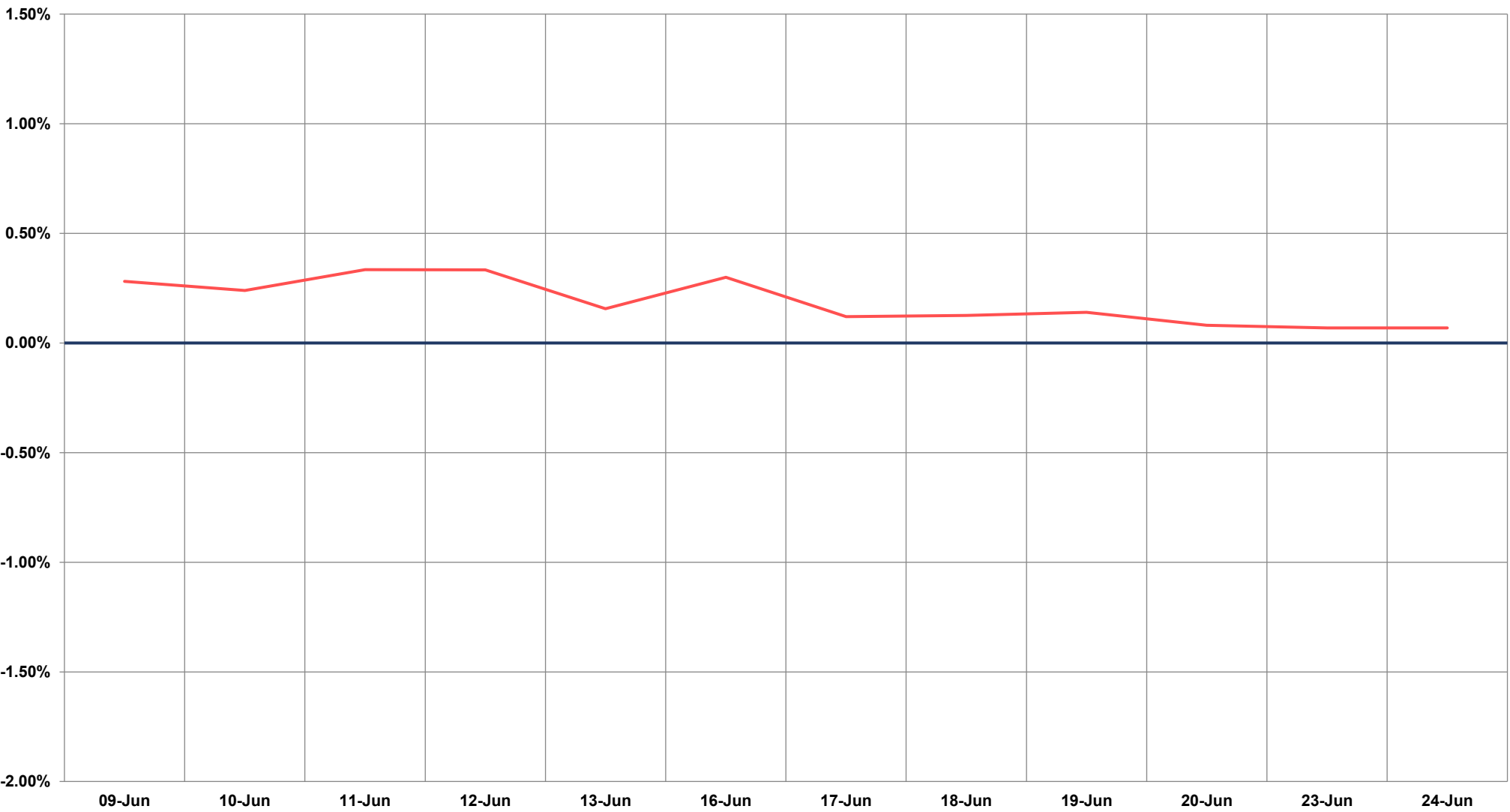
# TECHNICAL VIEWS



## BANK NIFTY FUTURES



## SPREAD: FUTURE & SPOT

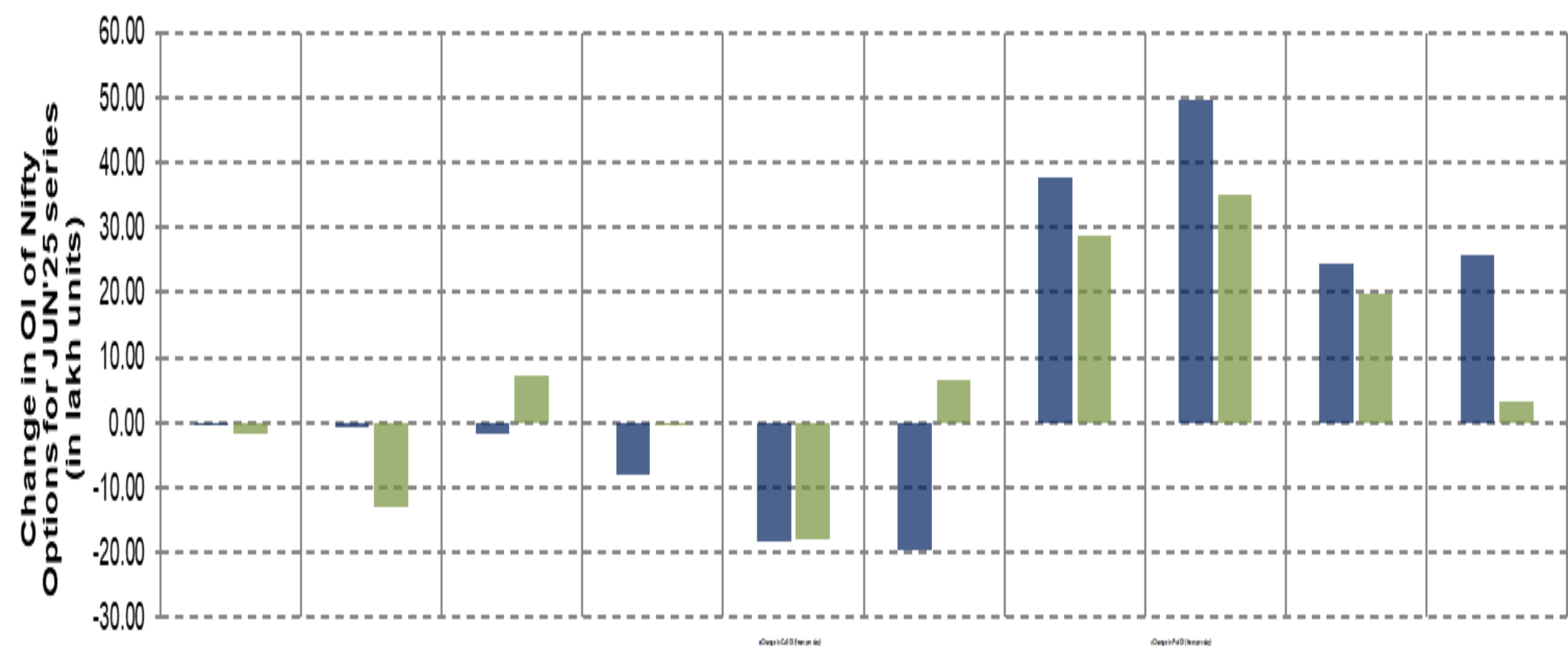
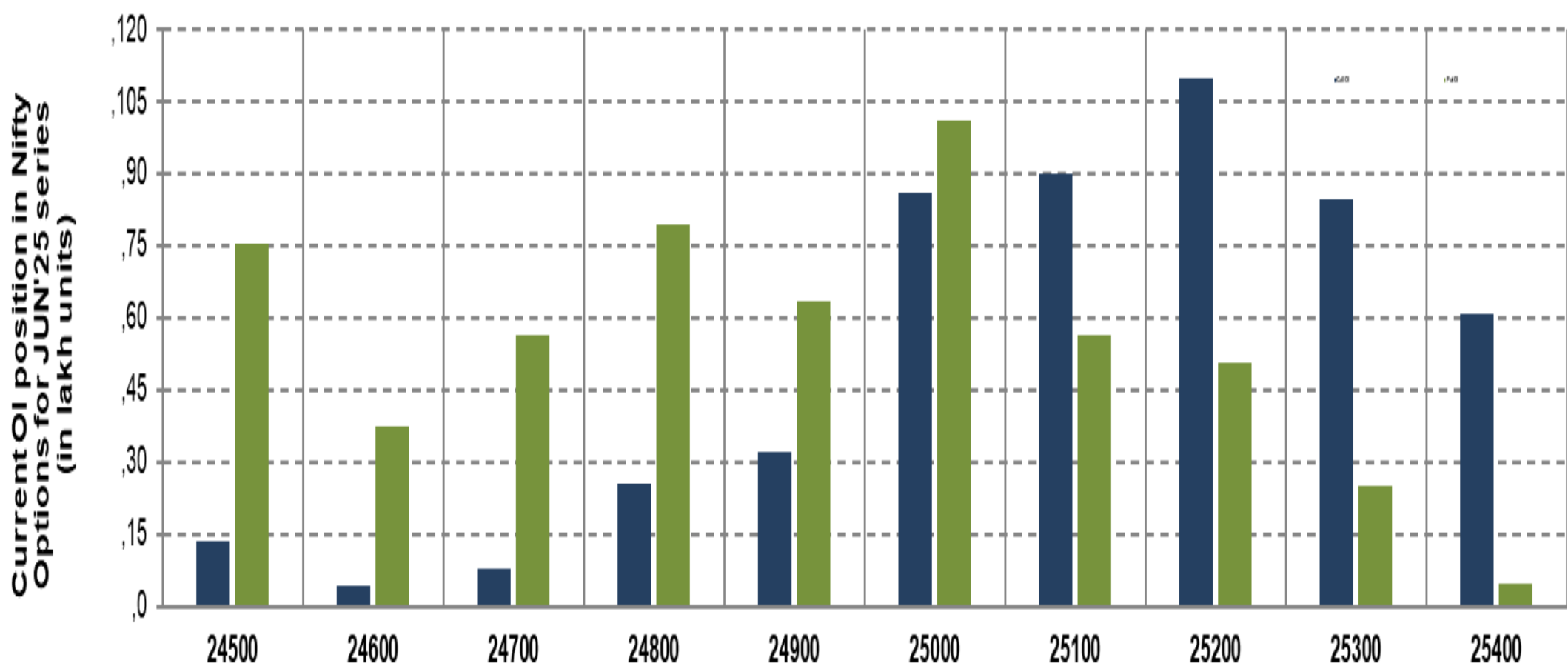




# TECHNICAL VIEWS



## NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 2.58 million in Open Interests is **Strike Price of 25400**
- **Most Active Nifty Put** with a addition of 3.51 millions in Open Interests is **Strike Price of 25200**
- **Maximum Open Interest an outstanding** was 11 millions for Calls at **Strike Price of 25200**
- **Maximum Open Interest an outstanding** was 10.1 millions for puts at **Strike Price of 25000**

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