



MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

June 25, 2025



Indian equity benchmarks ended near the day's high points on Wednesday, with both the Nifty and Sensex closing with significant gains. The rally was driven by strong buying in IT and Teck stocks. Markets made a gap-up opening and remained in positive territory throughout the session, supported by strong global cues amid easing tensions in the Middle East after a tentative ceasefire between Israel and Iran.

Some of the important factors in today's trade:

Free trade agreements with US, EU to be concluded soon: Traders took encouragement with Finance Minister Nirmala Sitharaman's statement that negotiations for the proposed free trade agreements with the US and European Union (EU) are progressing at a fast pace and would be concluded soon.

India firmly on track to become \$5 trillion economy by 2027: Traders took support with Union Commerce and Industry Minister Piyush Goyal's statement that India is firmly on track to become a \$5 trillion economy by 2027 despite global turbulence, driven by a collective national effort and strong leadership under Prime Minister Narendra Modi.

BTA with US likely to reduce India's goods trade surplus with US: Traders took note of a research report by CRISIL stating that the imminent bilateral trade agreements (BTA) with the US is likely to reduce India's goods trade surplus with that country.

Global front: European markets were trading mostly in red, as traders took note of comments from Fed Chair Jerome Powell that rate cuts can wait until the economic effects of tariff increases are better known. Asian markets ended mostly in green as Israel-Iran truce lifted the investors' mood.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	82755.51	700.40	0.85
NIFTY	25244.75	200.40	0.80
MIDCAP	46106.45	288.04	0.63
SMLCAP	53897.25	844.25	1.59
BSEFMC	20140.41	170.57	0.85
HEALTHCARE	43591.40	476.67	1.11
AUTO	53323.69	530.10	1
POWER	6774.45	36.49	0.54
REALTY	7914.57	45.50	0.68
BSE IT	38204.35	630.36	1.68
BANKEX	63698.80	67.44	0.11
OIL GAS	27077.59	-10.22	-0.04
METAL	31023.66	113.27	0.37
INDIA VIX	12.96	-0.68	-4.99

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	2135	775	80
BSE	2821	1207	134

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	6401	11364	(44)
NSE CASH	101658	111594	(9)
NSE F&O	383798	473856	(19)

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	22.69	3.67	1.11
SENSEX	23.70	4.40	0.96

KEY NUMBERS TRACKER



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

FII-DII*	Buy	Sell	Net
DII	12345	10327	2018
FII	13140	15446	(2306)

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)

FII	Buy	Sell	Net
Ind. Futures	6913.66	6385.40	528
Ind. Options	1816975.25	1795882.33	21093
Stk. Futures	107917.42	103794.24	4123
Stk. Options	89660.13	91294.64	(1635)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.11	0.86
BANK NIFTY	0.99	0.92

DOLLAR INDEX

Dollar Index	Current	Previous	% Change
DXY	97.92	97.86	0.06

10-YEARS G-SEC YIELD

Country	Current	Previous	% Change
INDIA	6.288	6.247	0.59
USA	4.310	4.299	0.47

KEY COMMODITIES TRACKER (in \$)

Commodity	Current	Change Points	% Change
Gold	3329.80	5.70	0.17
Silver	36.20	0.26	0.71
Crude-Oil	65.65	0.60	0.92
Brent-Crude	68.33	0.56	0.81

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES

Expiry	Close	Change Points	% Change
26 JUNE-25 USD-INR	86.09	0.02	0.02
26 JUNE-25 EUR-INR	99.94	0.02	0.02
26 JUNE-25 GBP-INR	117.37	0.09	0.07
26 JUNE-25 JPY- INR	59.57	0.21	0.36

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS

Index	Close	S2	S1	Pivot	R1	R2
NIFTY	25245	25070	25158	25212	25299	25354
SENSEX	82756	82161	82458	82637	82934	83113
NIFTY FUTURES	25252	25064	25158	25224	25318	25384
BANK NIFTY	56621	56314	56467	56574	56728	56835
CNX IT	39046	38417	38731	38920	39235	39424
CNX MIDCAP	58882	58594	58738	58851	58995	59109
CNX SMALLCAP	18728	18466	18597	18674	18805	18882
INDIA VIX	12.96	12.43	12.69	13.17	13.43	13.91

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	Buy	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

BSOFT, MCX, TITAGARH

TECHNICAL VIEWS



NIFTY

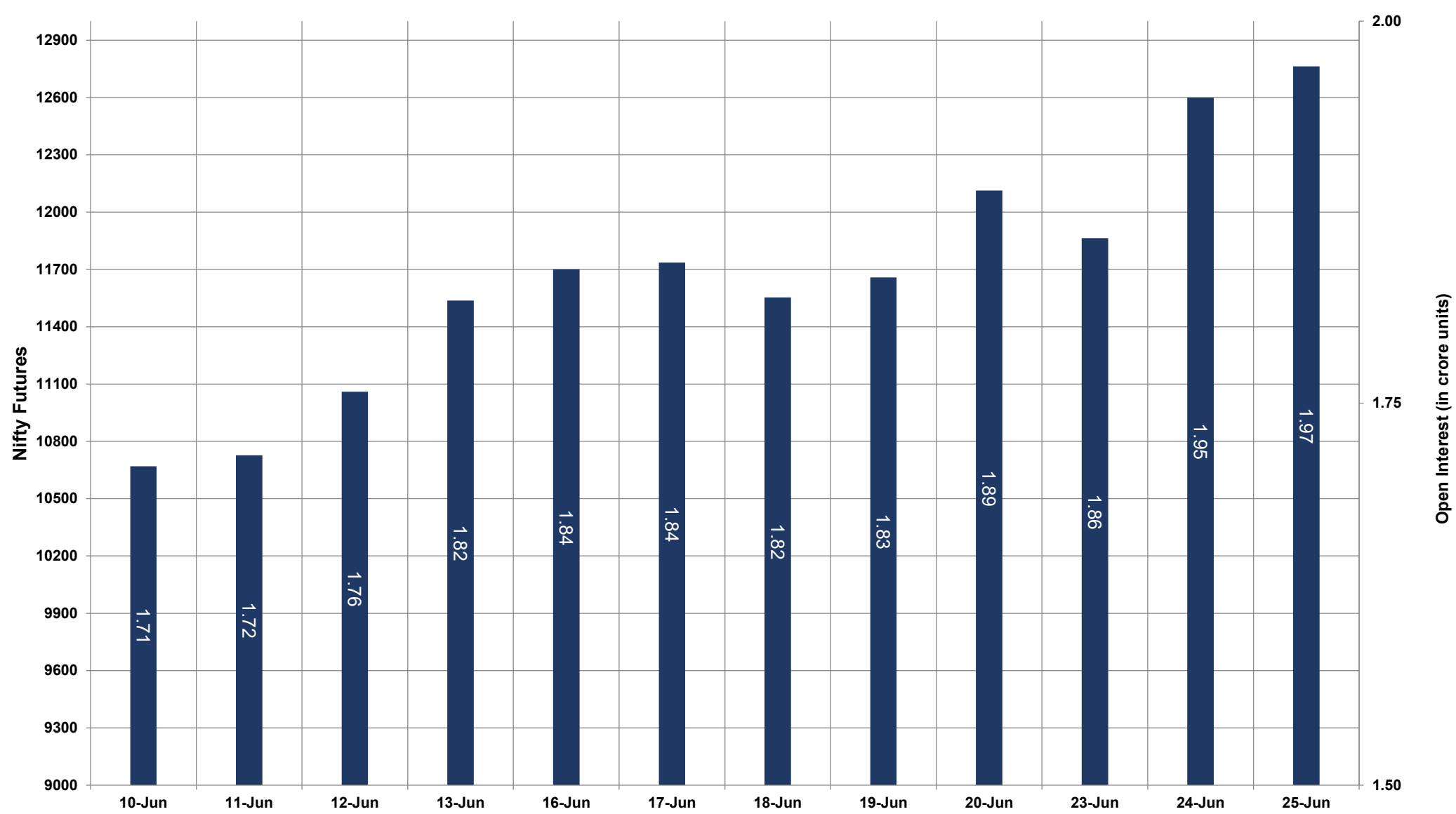


- Nifty Cash = **25244.75 (0.80%)**
- Resistance levels = **25350** and **25450**
- Support levels = **25100** and **25000**

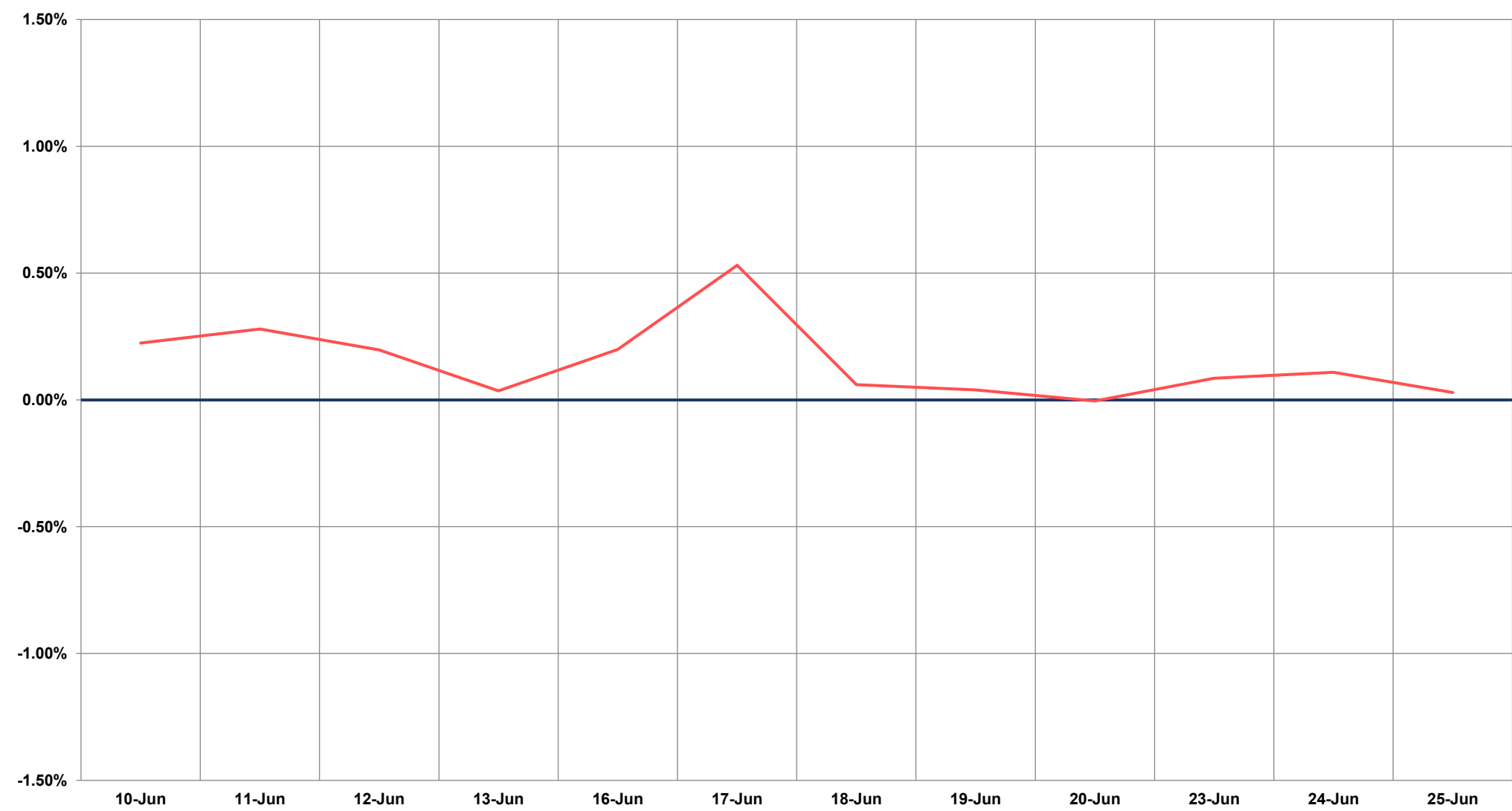
TECHNICAL VIEWS



NIFTY FUTURES



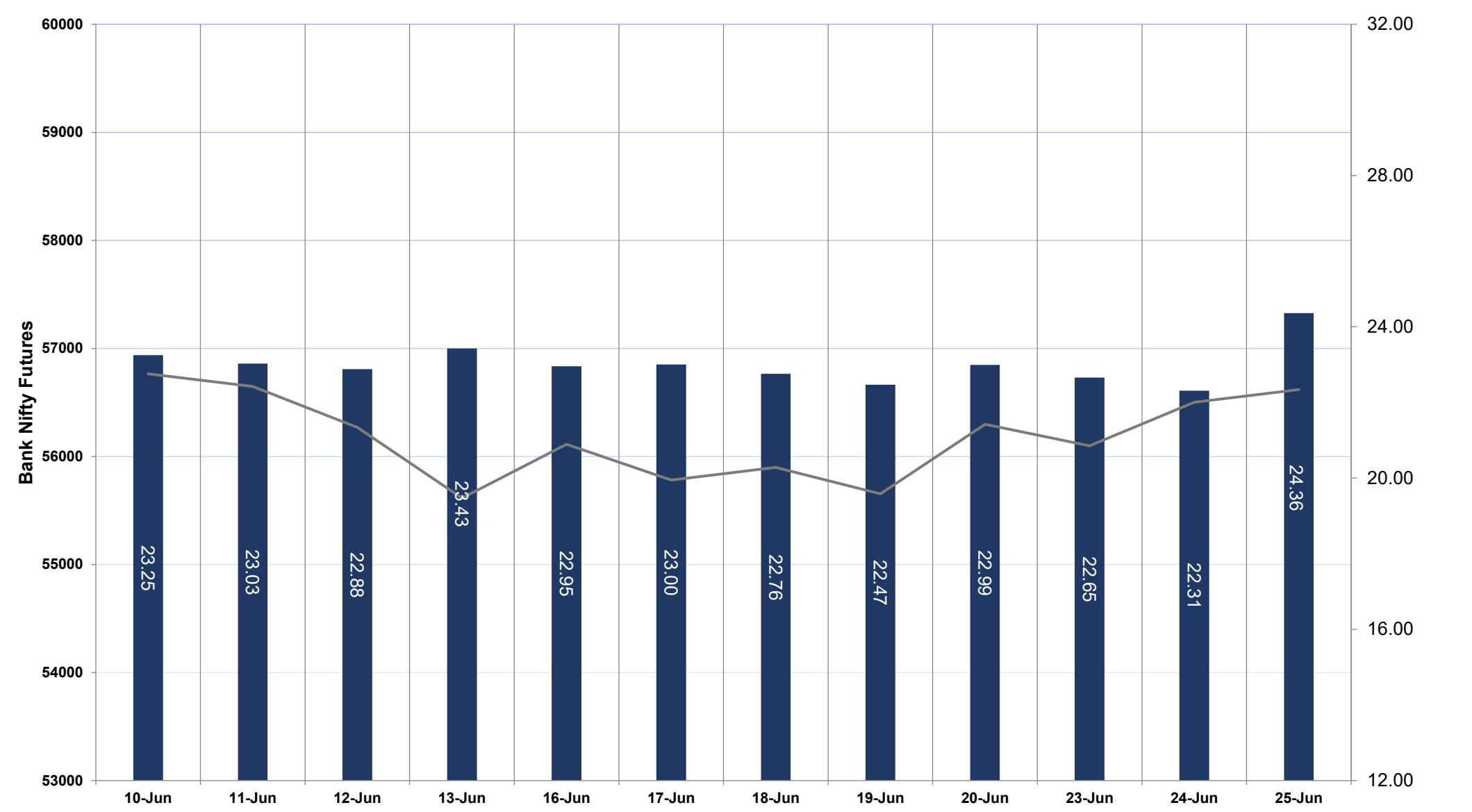
SPREAD: FUTURE & SPOT



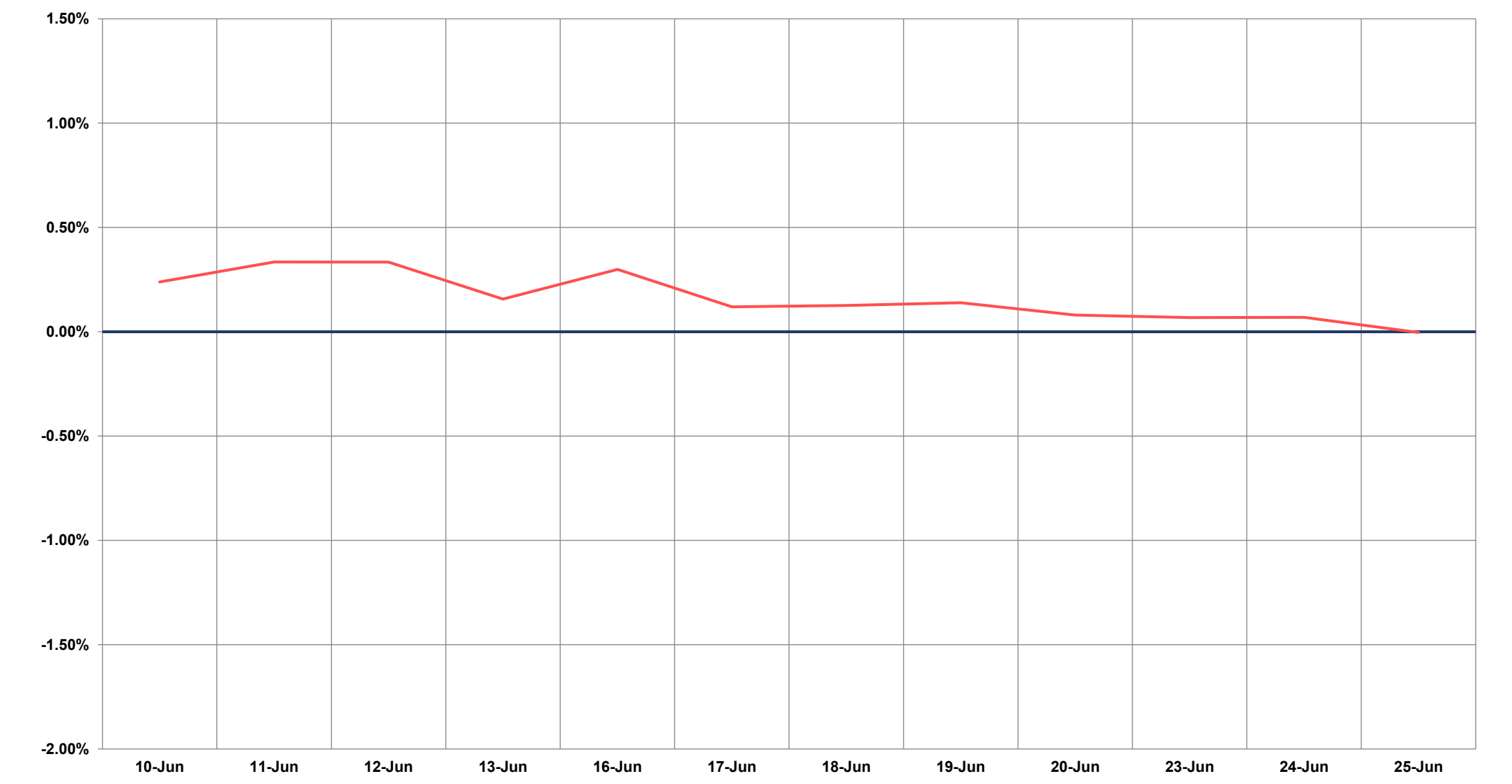
TECHNICAL VIEWS



BANK NIFTY FUTURES



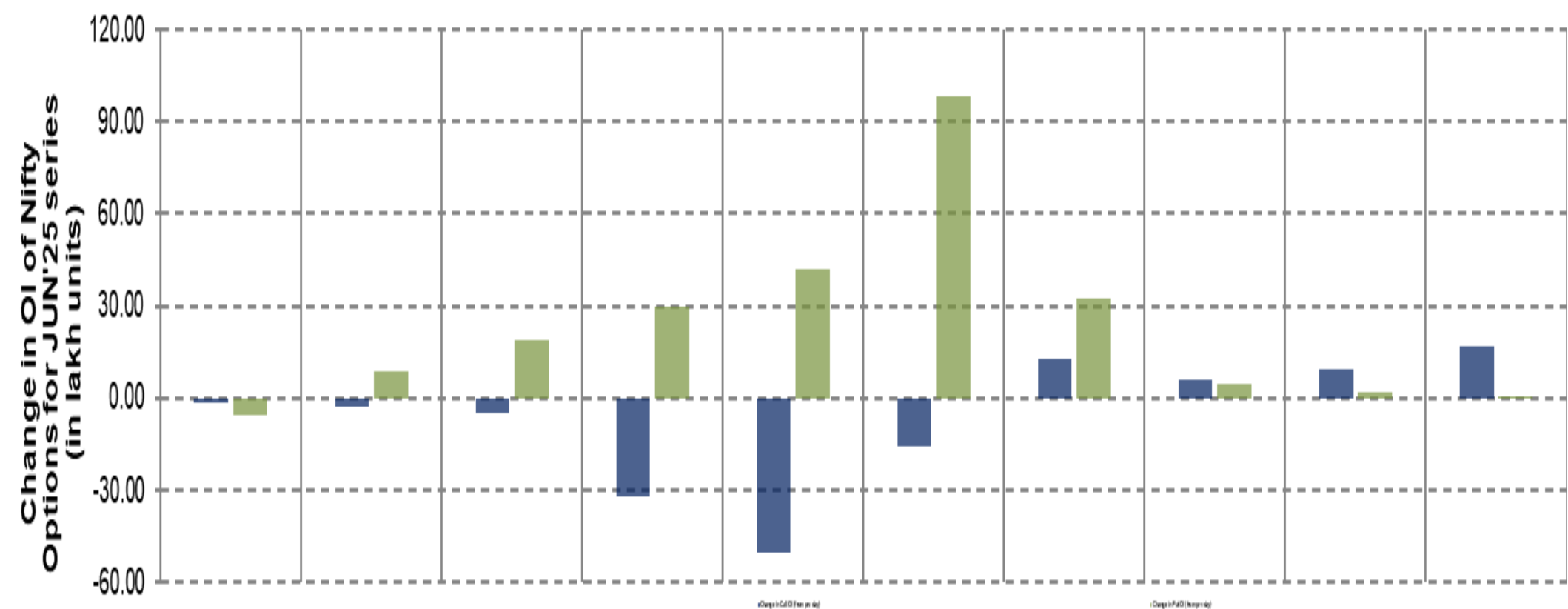
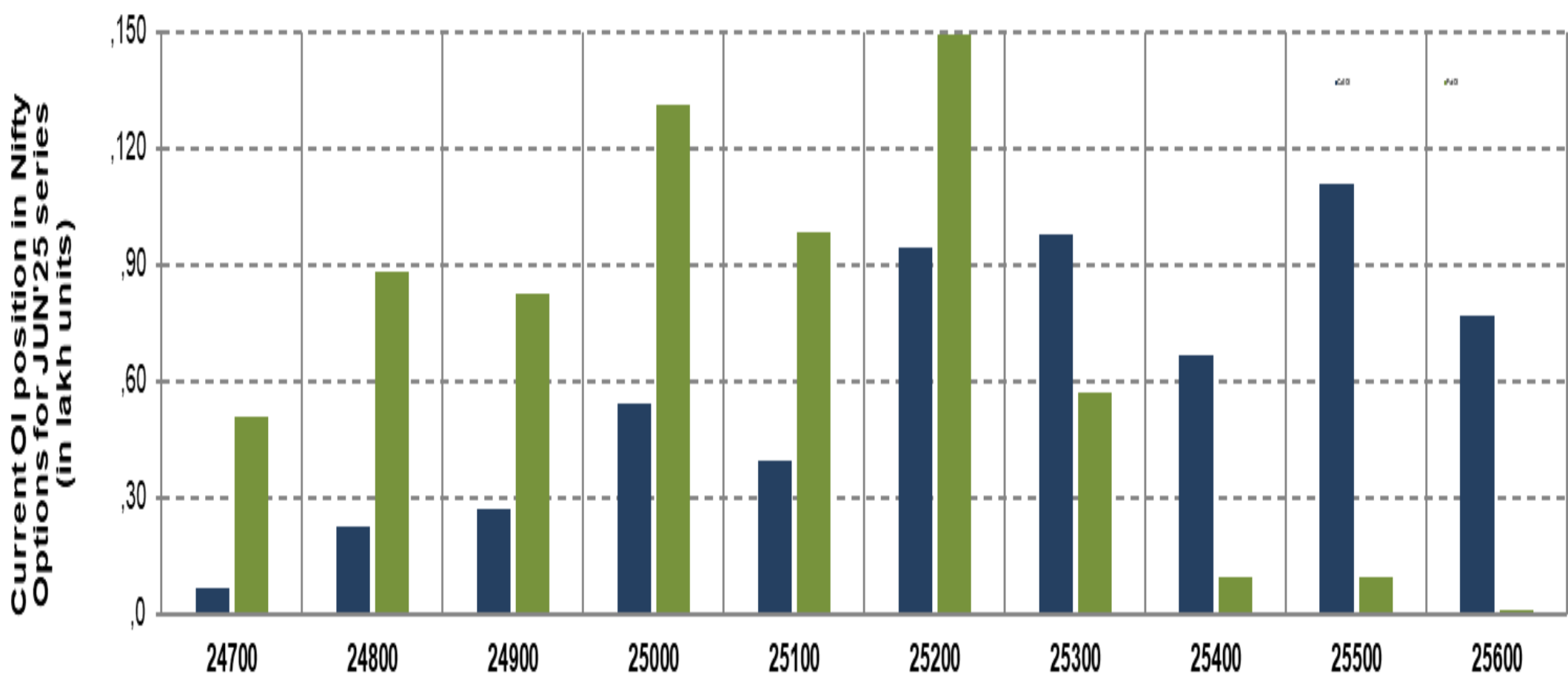
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an reduction of 5.05 million in Open Interests is **Strike Price of 25100**
- **Most Active Nifty Put** with a addition of 9.85 millions in Open Interests is **Strike Price of 25200**
- **Maximum Open Interest** an outstanding was 11.07 millions for Calls at **Strike Price of 25500**
- **Maximum Open Interest** an outstanding was 14.93 millions for puts at **Strike Price of 25200**

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