



MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

June 27, 2025



Indian equity benchmarks continued northward journey for fourth straight session on Friday, amid positive global cues. After making a cautious start, soon indices gain traction and remained higher till end of the day, supported by buying in index heavyweight stocks including Reliance Industries, ICICI Bank, and Bharti Airtel. Besides, traders remained watchful ahead of key economic data, including IIP, Manufacturing PMI and current account deficit in the coming week.

Some of the important factors in today's trade:

Foreign capital inflows: Traders took some support as the exchange data showed that Foreign Institutional Investors (FIIs) bought equities worth Rs 12,594.38 crore on Thursday.

Manufacturing sector sales grow 6% in FY25: Some support also came in as RBI in its report said that the sales of listed manufacturing sector companies rose by 6 per cent during 2024-25 as compared to 3.5 per cent growth in the preceding year, mainly led by automobiles, electrical machinery, food and beverages, and pharmaceuticals industries.

India to become net exporter of energy in six-seven years: Traders took note of report that Union Minister Nitin Gadkari has said that India will become the net exporter of energy in next six to seven years. He noted that 'Today we are the importer of the energy but within six to seven years we will be exporter of the energy'.

Global front: European markets were trading in green, after a White House official said the United States has struck a deal with China to expedite rare earth shipments, marking a significant step towards resolving their ongoing trade war. Asian markets ended mixed as China industrial profits declined notably in May as tariff tensions damped activity. Industrial profits decreased 9.1 percent in May from a year ago.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	84058.90	303.03	0.36
NIFTY	25637.80	88.80	0.35
MIDCAP	46541.25	178.48	0.38
SMLCAP	54249.40	288.83	0.54
BSEFMC	20293.15	29.25	0.14
HEALTHCARE	44014.70	300.35	0.69
AUTO	53758.90	162.20	0.30
POWER	6929.40	78.11	1.14
REALTY	7709.53	-122.85	-1.57
BSE IT	38060.14	-92.57	-0.24
BANKEX	64556.02	250.34	0.39
OIL GAS	27919.83	333.96	1.21
METAL	31850.65	118.36	0.37
INDIA VIX	12.38	-0.20	-1.61

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1679	1228	79
BSE	2165	1846	154

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	7248	6822	6
NSE CASH	153035	118579	29
NSE F&O	175660	413675	(58)

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	23.04	3.73	1.25
SENSEX	24.07	4.47	1.11

KEY NUMBERS TRACKER



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

FII-DII*	Buy	Sell	Net
DII	40672	41438	(766)
FII	19589	18084	1505

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)

FII	Buy	Sell	Net
Ind. Futures	2715.78	2424.98	291
Ind. Options	841409.04	853460.63	(12052)
Stk. Futures	30132.09	29213.01	919
Stk. Options	57699.85	63128.52	(5429)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.24	1.30
BANK NIFTY	1.13	1.05

DOLLAR INDEX

Dollar Index	Current	Previous	% Change
DXY	97.25	97.15	0.11

10-YEARS G-SEC YIELD

Country	Current	Previous	% Change
INDIA	6.316	6.274	0.04
USA	4.274	4.263	0.02

KEY COMMODITIES TRACKER (in \$)

Commodity	Current	Change Points	% Change
Gold	3273.43	-45.16	-1.36
Silver	35.96	-0.65	-1.79
Crude-Oil	65.10	-0.11	-0.17
Brent-Crude	67.41	-0.34	-0.49

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES				
Expiry		Close	Change Points	% Change
29 JULY-25	USD-INR	85.60	-0.25	-0.29
29 JULY-25	EUR-INR	100.45	-0.25	-0.24
29 JULY-25	GBP-INR	117.62	-0.20	-0.17
29 JULY-25	JPY- INR	59.74	-0.16	-0.26

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS						
Index	Close	S2	S1	Pivot	R1	R2
NIFTY	25638	25475	25556	25605	25687	25736
SENSEX	84059	83487	83773	83931	84217	84375
NIFTY FUTURES	25750	25582	25666	25719	25803	25856
BANK NIFTY	57444	56823	57133	57304	57615	57786
CNX IT	38823	38312	38567	38963	39218	39613
CNX MIDCAP	59385	59115	59250	59472	59607	59829
CNX SMALLCAP	18977	18801	18889	18943	19031	19085
INDIA VIX	12.39	11.94	12.17	12.54	12.77	13.14

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	Sell	Neutral

SECURITIES BAN IN F&O TRADES FOR 28-06-2025
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TECHNICAL VIEWS



NIFTY

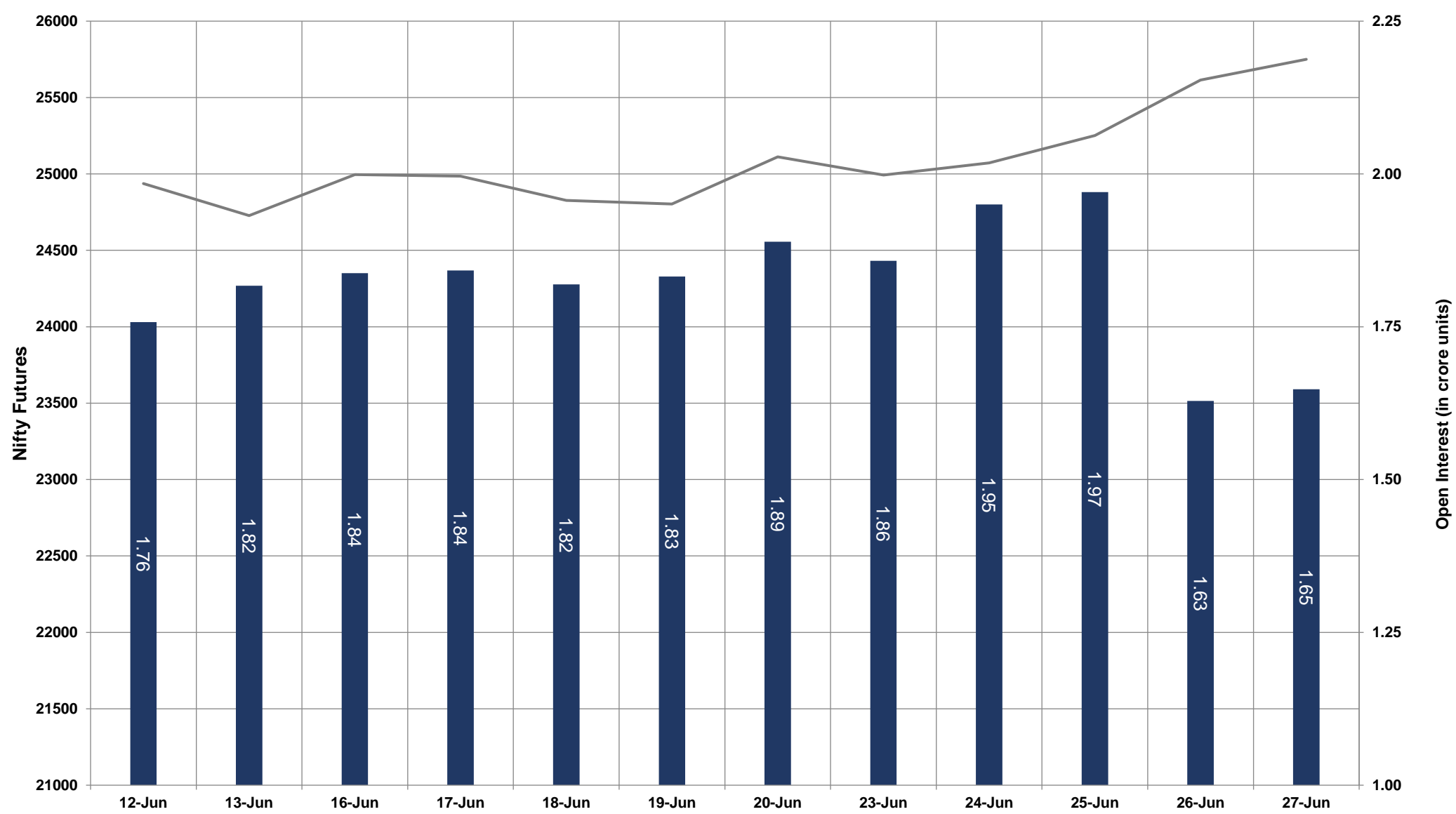


- Nifty Cash = **25637.80 (0.35%)**
- Resistance levels = **25750** and **25900**
- Support levels = **25550** and **25450**

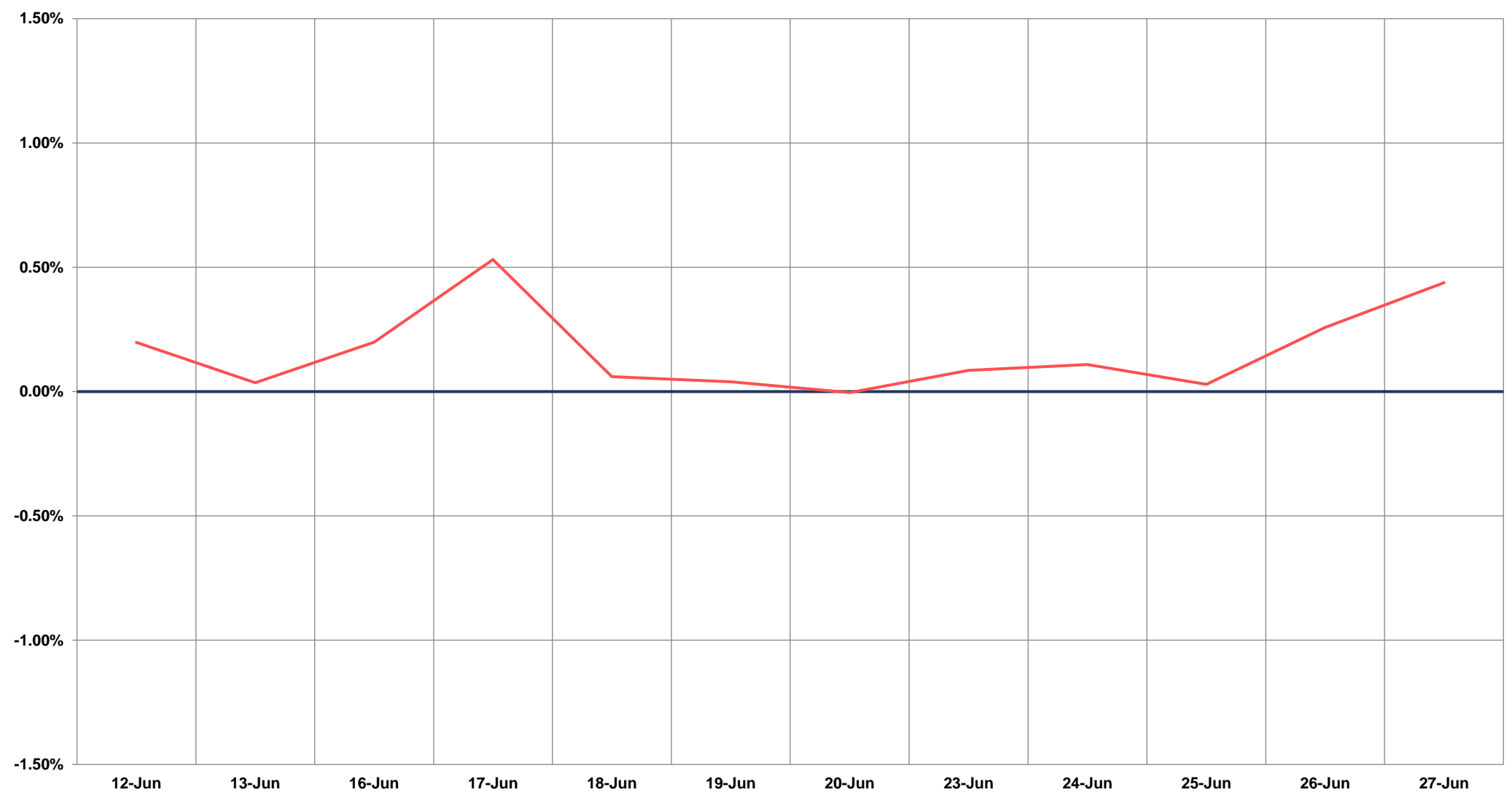
TECHNICAL VIEWS



NIFTY FUTURES



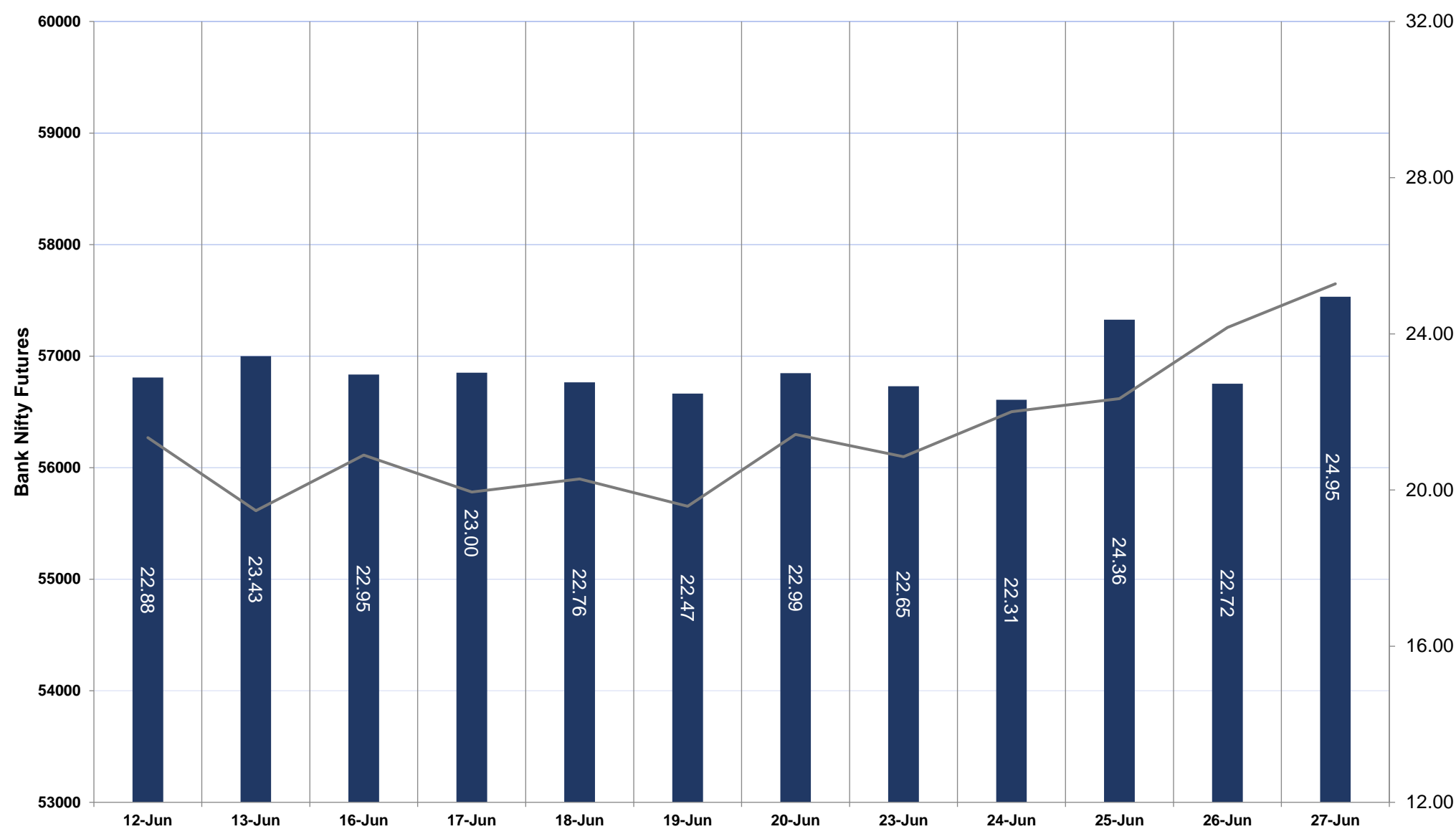
SPREAD: FUTURE & SPOT



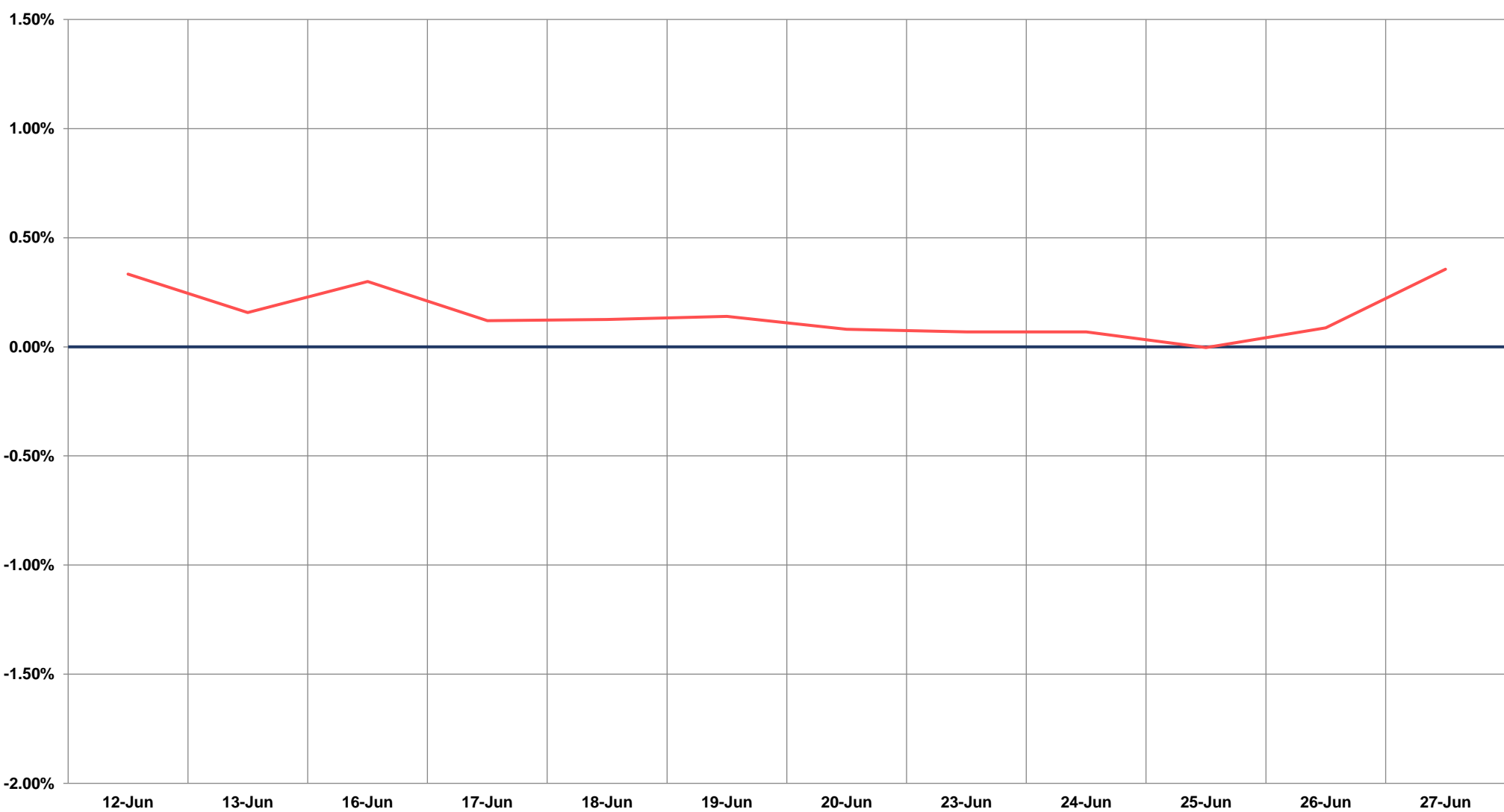
TECHNICAL VIEWS



BANK NIFTY FUTURES



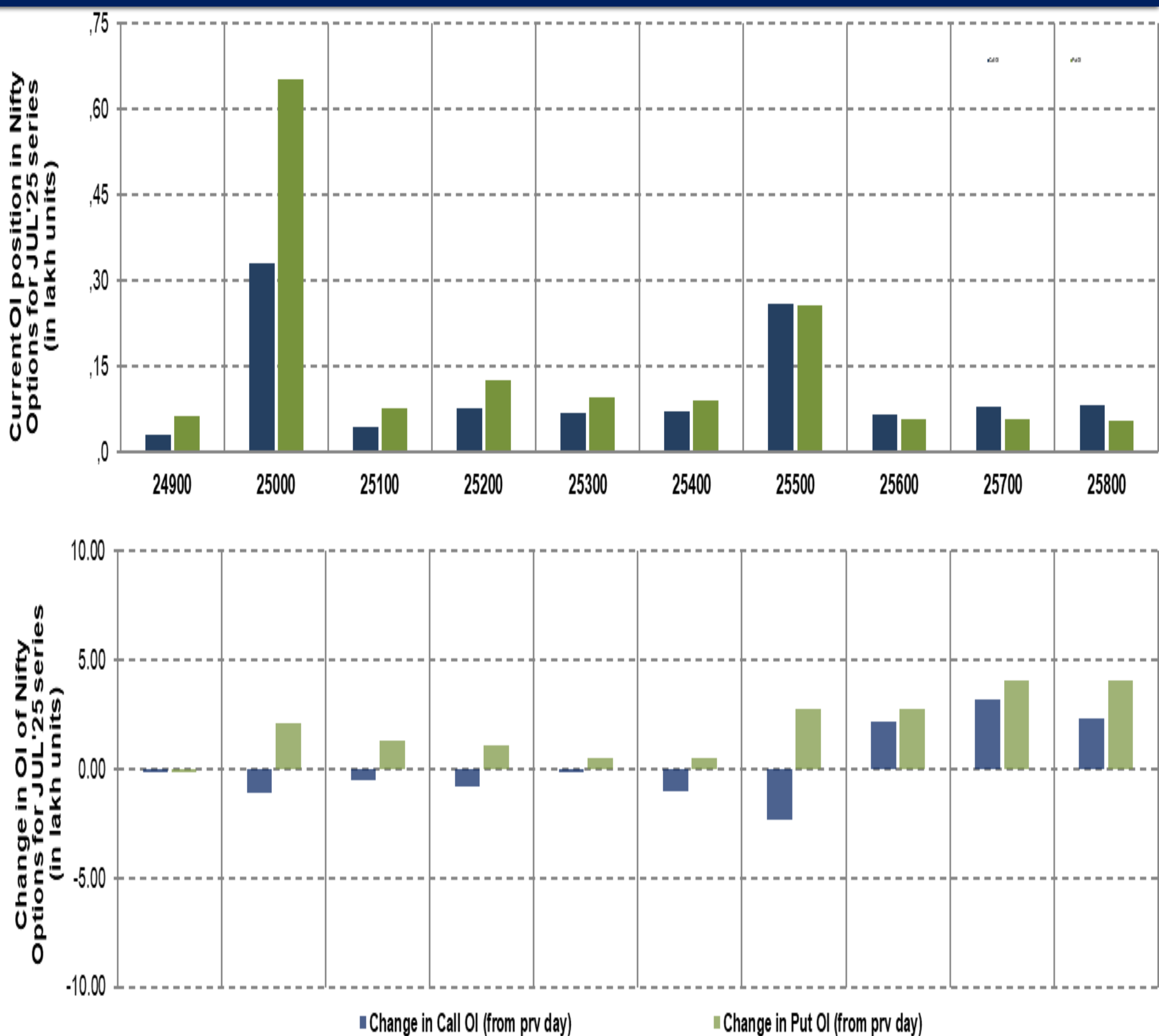
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.31 million in Open Interests is **Strike Price of 25700**
- **Most Active Nifty Put** with a addition of 0.40 millions in Open Interests is **Strike Price of 25800**
- **Maximum Open Interest an outstanding** was 3.29 millions for Calls at **Strike Price of 25000**
- **Maximum Open Interest an outstanding** was 6.52 millions for puts at **Strike Price of 25000**

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