



# MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

June 30, 2025



Indian equity benchmarks snapped four-day winning streak on Monday and ended with cut of near half a percent despite easing geopolitical tensions. After making cautious start, indices extended their losses and held their downward trend till the end of the session. Traders were cautious ahead of industrial production data, which is due later in a day. Besides, HSBC manufacturing PMI final data is going to be out tomorrow.

Some of the important factors in today's trade:

India's external debt rises 10% to \$736.3 billion: Investors were worried as RBI has said that India's external debt increased by 10 per cent to \$736.3 billion at the end of March 2025 compared to \$668.8 billion in the year-ago period. As a percentage of the GDP, the external debt increased to 19.1 per cent at the end of the recently concluded financial year (FY25) from 18.5 per cent a year ago.

India posts current account surplus of \$13.5 billion in Q4FY25: Traders overlooked RBI in its latest report 'India's Balance of Payments during the Fourth Quarter (January-March) of 2024-25' has said that the country posted a current account surplus of \$13.5 billion or 1.3 per cent of GDP in March quarter 2024-25 (Q4FY25) as compared with \$4.6 billion in the year-ago period mainly on account of surge in services exports and higher remittances.

Foreign fund inflows: The exchange data showed foreign institutional investors (FIIs) were net buyers on June 27, purchasing equities worth Rs 1,397.02 crore.

Global front: European markets were trading lower as investors eyed progress in global trade negotiations ahead of the impending July 9 deadline for U.S. reciprocal tariffs. Asian markets ended mixed as Industrial production in Japan was up a seasonally adjusted 0.5 percent on month in May. On a yearly basis, industrial production was down 1.8 percent.

# MARKET SELFIE



## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	83606.46	-452.44	-0.54
NIFTY	25517.05	-120.75	-0.47
MIDCAP	46854.46	313.21	0.67
SMLCAP	54690.91	441.51	0.81
BSEFMC	20241.32	-51.83	-0.26
HEALTHCARE	44259.41	244.71	0.56
AUTO	53495.02	-263.88	-0.49
POWER	6937.59	8.19	0.12
REALTY	7642.29	-67.24	-0.87
BSE IT	38121.71	61.57	0.16
BANKEX	64177.72	-378.30	-0.59
OIL GAS	27866.79	-53.04	-0.19
METAL	31695.95	-154.70	-0.49
INDIA VIX	12.78	0.39	3.21

## ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1752	1186	114
BSE	2320	1800	170

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	5666	7248	(22)
NSE CASH	108192	153035	(29)
NSE F&O	141483	175660	(19)

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	22.97	3.70	1.24
SENSEX	23.94	4.45	1.12

# KEY NUMBERS TRACKER



FII – DII ACTIVITY IN CASH SEGMENT (₹ in Crs)			
FII-DII*	Buy	Sell	Net
DII	15733	12350	3383
FII	12862	13650	(788)

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)			
FII	Buy	Sell	Net
Ind. Futures	3070.28	3973.13	(903)
Ind. Options	1048007.24	1058911.63	(10904)
Stk. Futures	14669.14	18160.49	(3491)
Stk. Options	42185.99	41991.72	194

PUT-CALL RATIO		
Index	Current	Previous
NIFTY	0.81	1.24
BANK NIFTY	1.08	1.13

DOLLAR INDEX			
Dollar Index	Current	Previous	% Change
DXY	96.92	97.40	-0.50

10-YEARS G-SEC YIELD			
Country	Current	Previous	% Change
INDIA	6.324	6.316	0.01
USA	4.236	4.274	-0.02

KEY COMMODITIES TRACKER (in \$)			
Commodity	Current	Change Points	% Change
Gold	3295.43	22.27	0.68
Silver	35.97	0.00	0.00
Crude-Oil	64.95	-0.15	-0.23
Brent-Crude	66.59	-0.82	-1.22



# CURRENCY FUTURES & INDEX TRENDS TRACKER



## CURRENCY FUTURES

Expiry	Close	Change Points	% Change
29 JULY-25 USD-INR	85.90	0.27	0.31
29 JULY-25 EUR-INR	100.88	0.42	0.42
29 JULY-25 GBP-INR	117.75	0.13	0.11
29 JULY-25 JPY- INR	59.57	-0.16	-0.27

## INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS

Index	Close	S2	S1	Pivot	R1	R2
NIFTY	25517	25357	25437	25553	25633	25749
SENSEX	83606	83112	83359	83729	83977	84347
NIFTY FUTURES	25614	25443	25529	25661	25746	25878
BANK NIFTY	57313	56953	57133	57374	57554	57794
CNX IT	38950	38512	38731	38871	39091	39231
CNX MIDCAP	59741	59291	59516	59656	59881	60021
CNX SMALLCAP	19075	18955	19015	19084	19144	19213
INDIA VIX	12.78	12.09	12.44	12.73	13.08	13.37

## 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 30-06-2025

# RBLBANK

# TECHNICAL VIEWS



## NIFTY

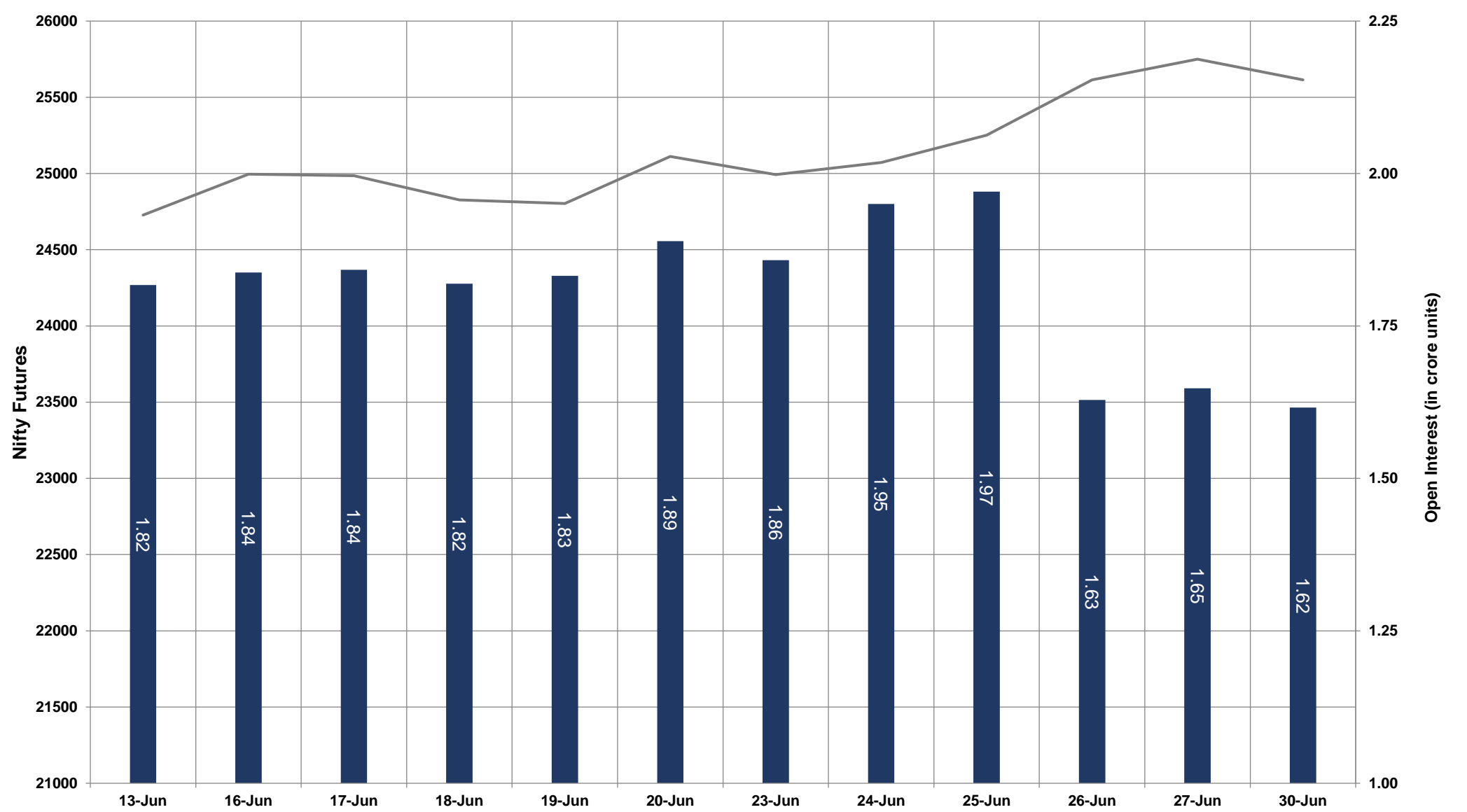


- Nifty Cash = **25517.05 (-0.47%)**
- Resistance levels = **25650** and **25750**
- Support levels = **25350** and **25280**

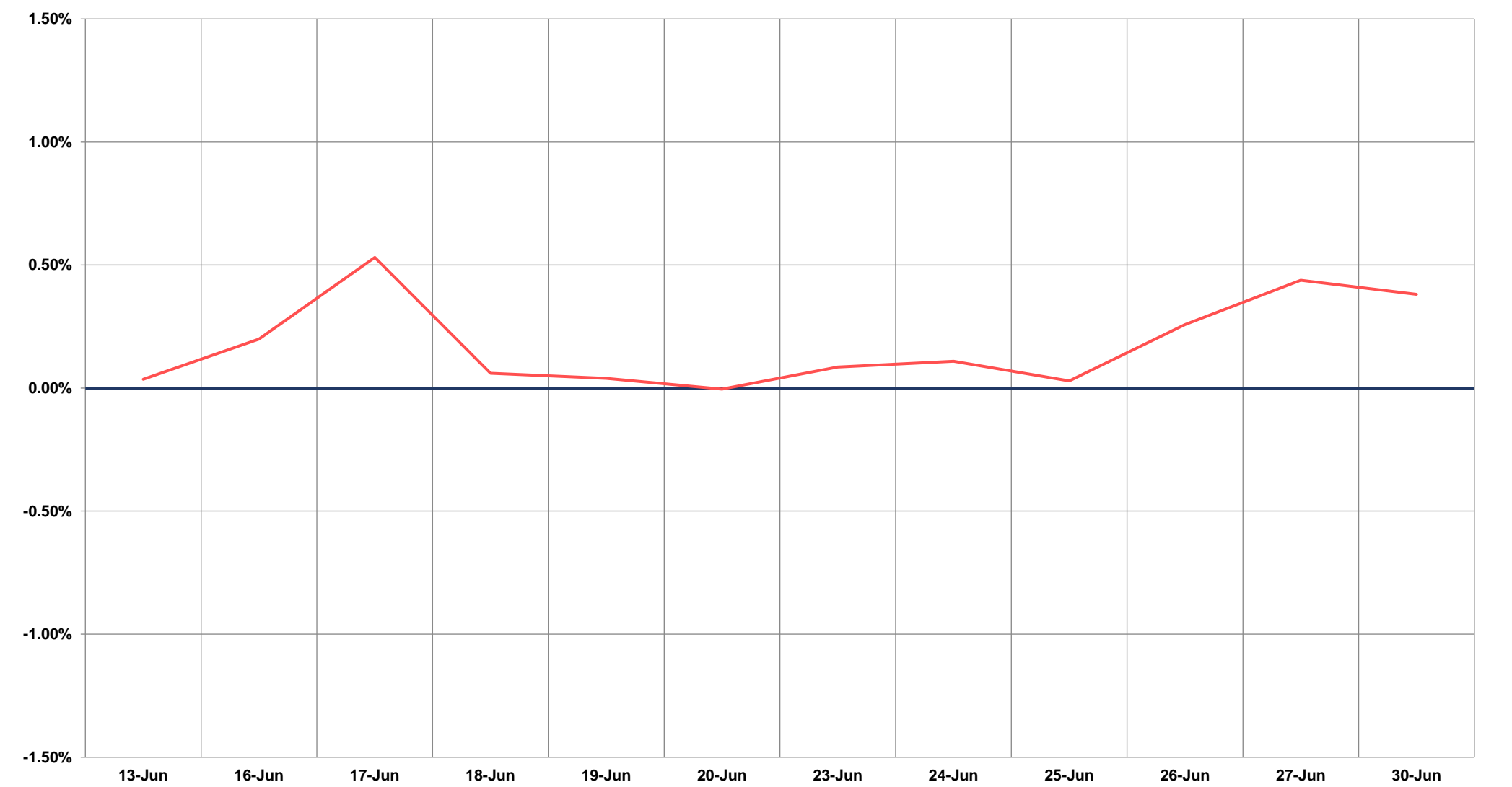
# TECHNICAL VIEWS



## NIFTY FUTURES



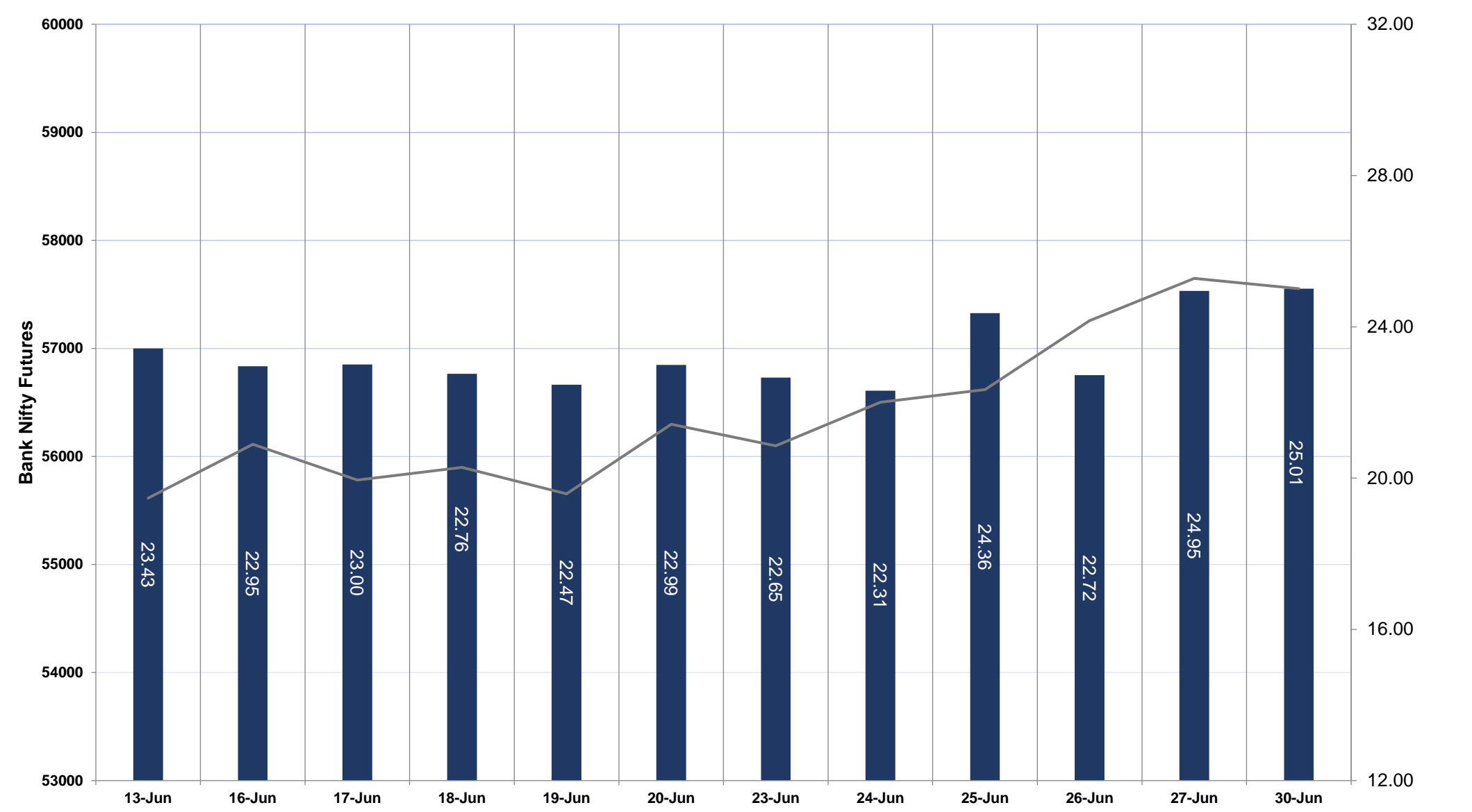
## SPREAD: FUTURE & SPOT



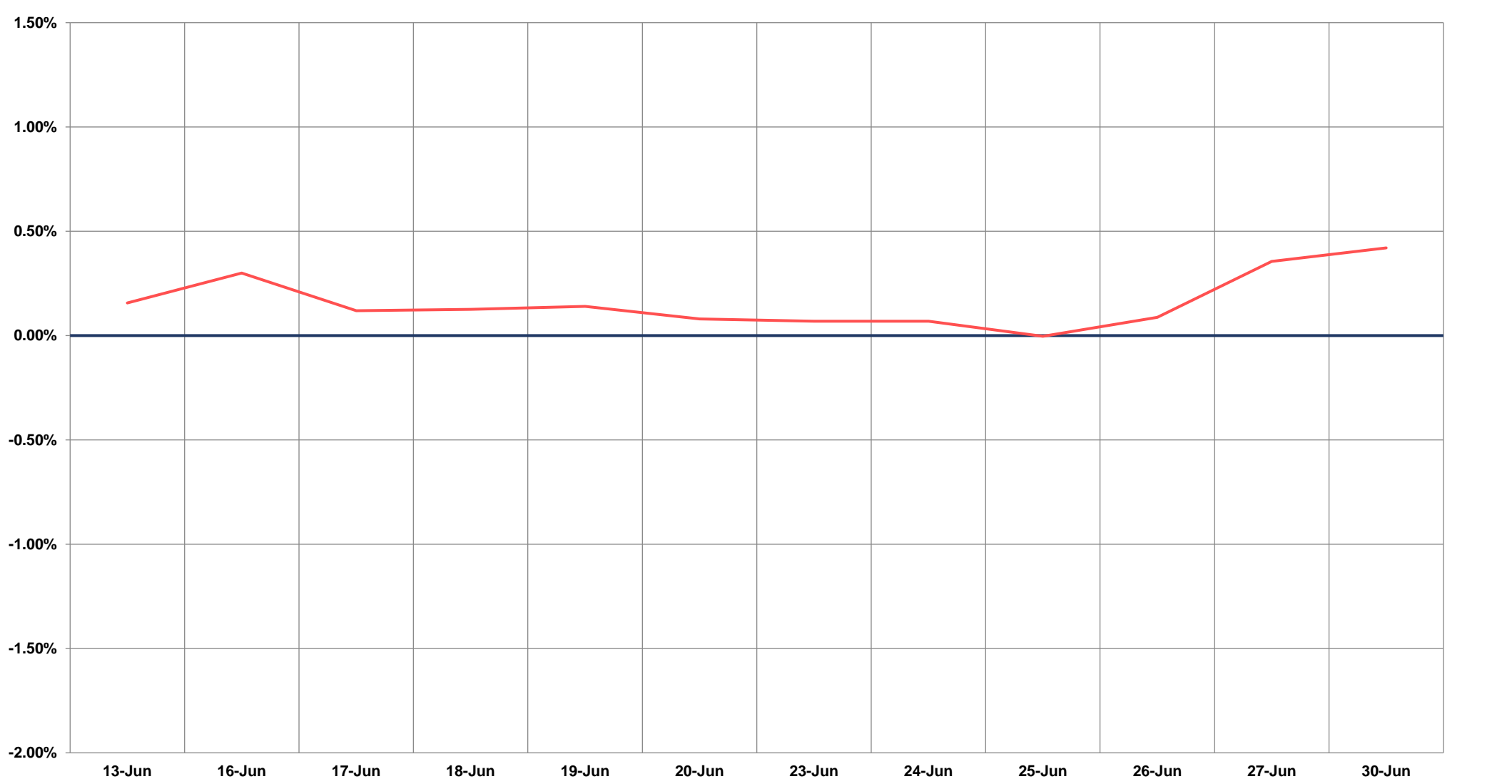
# TECHNICAL VIEWS



## BANK NIFTY FUTURES



## SPREAD: FUTURE & SPOT

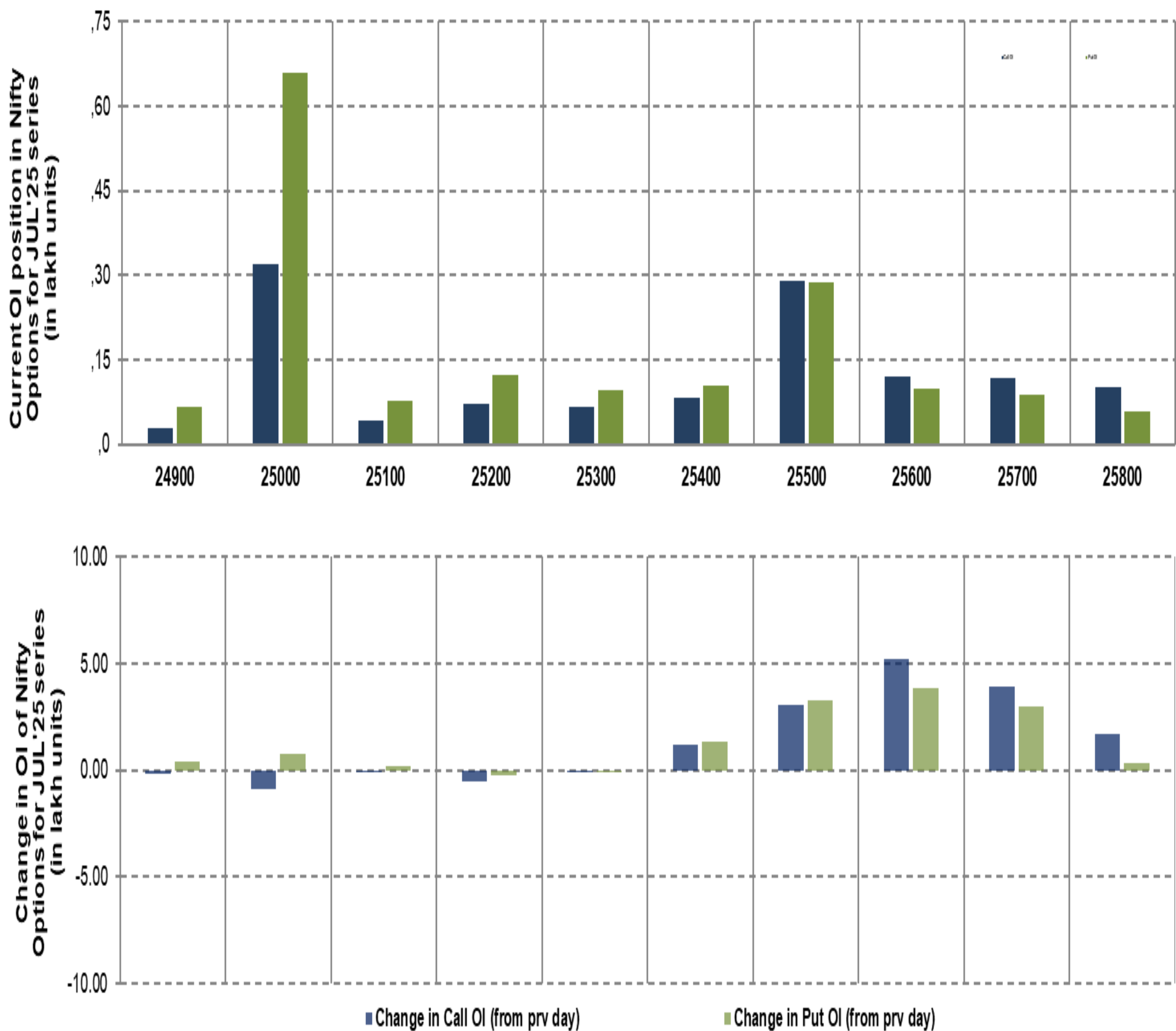




# TECHNICAL VIEWS



## NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.52 million in Open Interests is **Strike Price of 25600**
- **Most Active Nifty Put** with a addition of 0.38 millions in Open Interests is **Strike Price of 25600**
- **Maximum Open Interest an outstanding** was 3.20 millions for Calls at **Strike Price of 25000**
- **Maximum Open Interest an outstanding** was 6.60 millions for puts at **Strike Price of 25000**

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