



# MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

July 03, 2025



Indian equity benchmarks failed to sustain early gains and ended in negative territory on Thursday. After making a cautious start, soon indices added some gains to trade higher as traders took support with a survey showing that India's services sector enjoyed its strongest growth in ten months in June, fuelled by robust demand and cooling price pressures. In last hour of trade, markets erased all intraday gains and closed with modest losses, as investors turned cautious ahead of the anticipated India-US trade deal.

Some of the important factors in today's trade:

**Ongoing foreign fund outflow:** Some concern came as exchange data showed Foreign institutional investors (FIIs) offloaded equities worth Rs 1,542.56 crore on a net basis on Wednesday.

**India's services PMI grows to 60.4 in June:** HSBC final India Services Purchasing Managers' Index (PMI), compiled by S&P Global, climbed to 60.4 in June from 58.8 in May. The HSBC India Composite PMI Output Index -- which measures both manufacturing and services -- also surged to 61.0 in June as against 59.3 in May.

**Jaishankar holds talks with American counterparts:** Traders paid no attention towards External Affairs Minister S Jaishankar and his American counterpart Marco Rubio have hold talks focused on ways to deepen the India-US collaboration in key sectors such as trade, defence, energy, mobility and critical technologies.

**Global front:** European markets were trading mostly in red, as traders were cautious ahead of the deadline of July 9 set by the US President Donald Trump for reaching trade deals with its partner countries. Asian markets ended mostly in green as investors reacted to a U.S.-Vietnam trade deal and awaited the monthly U.S. nonfarm payroll data later in the day for directional cues.

# MARKET SELFIE



## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	83239.47	-170.22	-0.20
NIFTY	25405.30	-48.10	-0.19
MIDCAP	46708.33	-26.99	-0.06
SMLCAP	54738.17	254.25	0.47
BSEFMC	20116.81	36.93	0.18
HEALTHCARE	44608.11	326.43	0.74
AUTO	53702.70	214.20	0.40
POWER	6837.05	-19.13	-0.28
REALTY	7475.38	-45.79	-0.61
BSE IT	38063.84	21.06	0.06
BANKEX	63384.67	-306.10	-0.48
OIL GAS	28003.78	124.79	0.45
METAL	32001.43	-246.93	-0.77
INDIA VIX	12.38	-0.07	-0.56

## ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1450	1473	103
BSE	2009	2001	158

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	7335	6996	5
NSE CASH	96739	105117	(8)
NSE F&O	161113	152217	6

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	22.87	3.68	1.25
SENSEX	23.83	4.43	1.12

# KEY NUMBERS TRACKER



FII – DII ACTIVITY IN CASH SEGMENT (₹ in Crs)			
FII-DII*	Buy	Sell	Net
DII	12140	11062	1079
FII	10947	12719	(1771)

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)			
FII	Buy	Sell	Net
Ind. Futures	2945.88	5389.47	(2444)
Ind. Options	3907212.65	3841721.45	65491
Stk. Futures	15860.96	16038.62	(178)
Stk. Options	43203.19	43587.36	(384)

PUT-CALL RATIO		
Index	Current	Previous
NIFTY	0.84	0.77
BANK NIFTY	0.98	1.02

DOLLAR INDEX			
Dollar Index	Current	Previous	% Change
DXY	96.80	96.78	0.02

10-YEARS G-SEC YIELD			
Country	Current	Previous	% Change
INDIA	6.287	6.288	-0.02
USA	4.261	4.290	-0.68

KEY COMMODITIES TRACKER (in \$)			
Commodity	Current	Change Points	% Change
Gold	3344.85	-4.50	-0.09
Silver	36.90	0.50	1.39
Crude-Oil	67.33	-0.17	-0.25
Brent-Crude	68.97	-0.13	-0.19



# CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES				
Expiry		Close	Change Points	% Change
29 JULY-25	USD-INR	85.43	-0.30	-0.35
29 JULY-25	EUR-INR	100.92	-0.10	-0.10
29 JULY-25	GBP-INR	116.76	-0.80	-0.68
29 JULY-25	JPY- INR	59.84	0.29	0.49

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS						
Index	Close	S2	S1	Pivot	R1	R2
NIFTY	25405	25256	25331	25459	25534	25662
SENSEX	83239	82762	83001	83425	83664	84089
NIFTY FUTURES	25509	25370	25439	25555	25624	25739
BANK NIFTY	56792	56487	56640	56916	57069	57346
CNX IT	38854	38554	38704	38954	39104	39354
CNX MIDCAP	59683	59409	59546	59751	59888	60093
CNX SMALLCAP	19027	18902	18964	19023	19085	19143
INDIA VIX	12.38	11.94	12.16	12.41	12.63	12.88

INDEX TREND ANALYSIS			
Index	Daily	Weekly	Monthly
NIFTY	Neutral	Buy	Buy
SENSEX	Neutral	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 04-07-2025
RBLBANK

# TECHNICAL VIEWS



## NIFTY

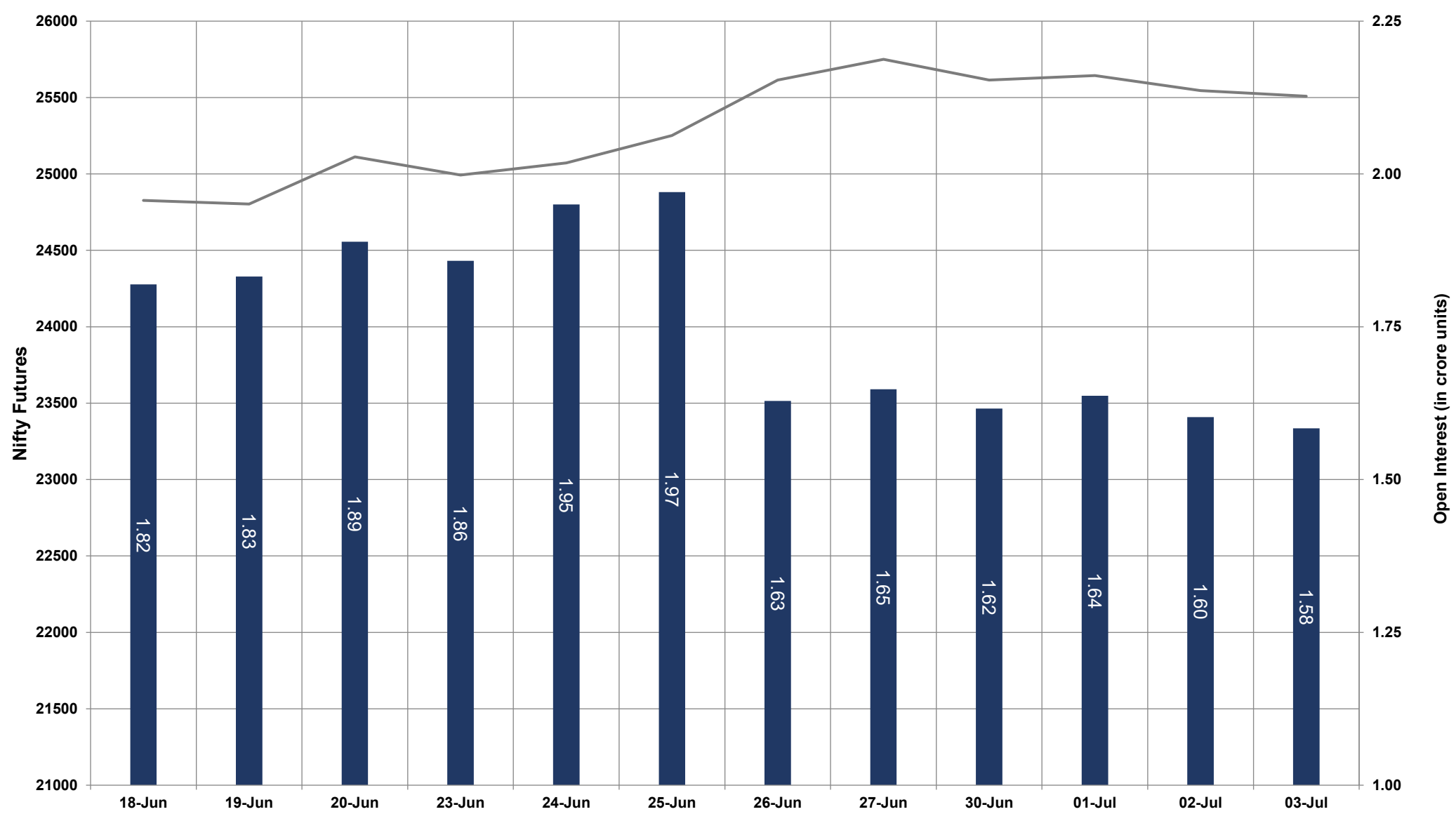


- Nifty Cash = **25405.30 (-0.19%)**
- Resistance levels = **25545** and **25610**
- Support levels = **25310** and **25240**

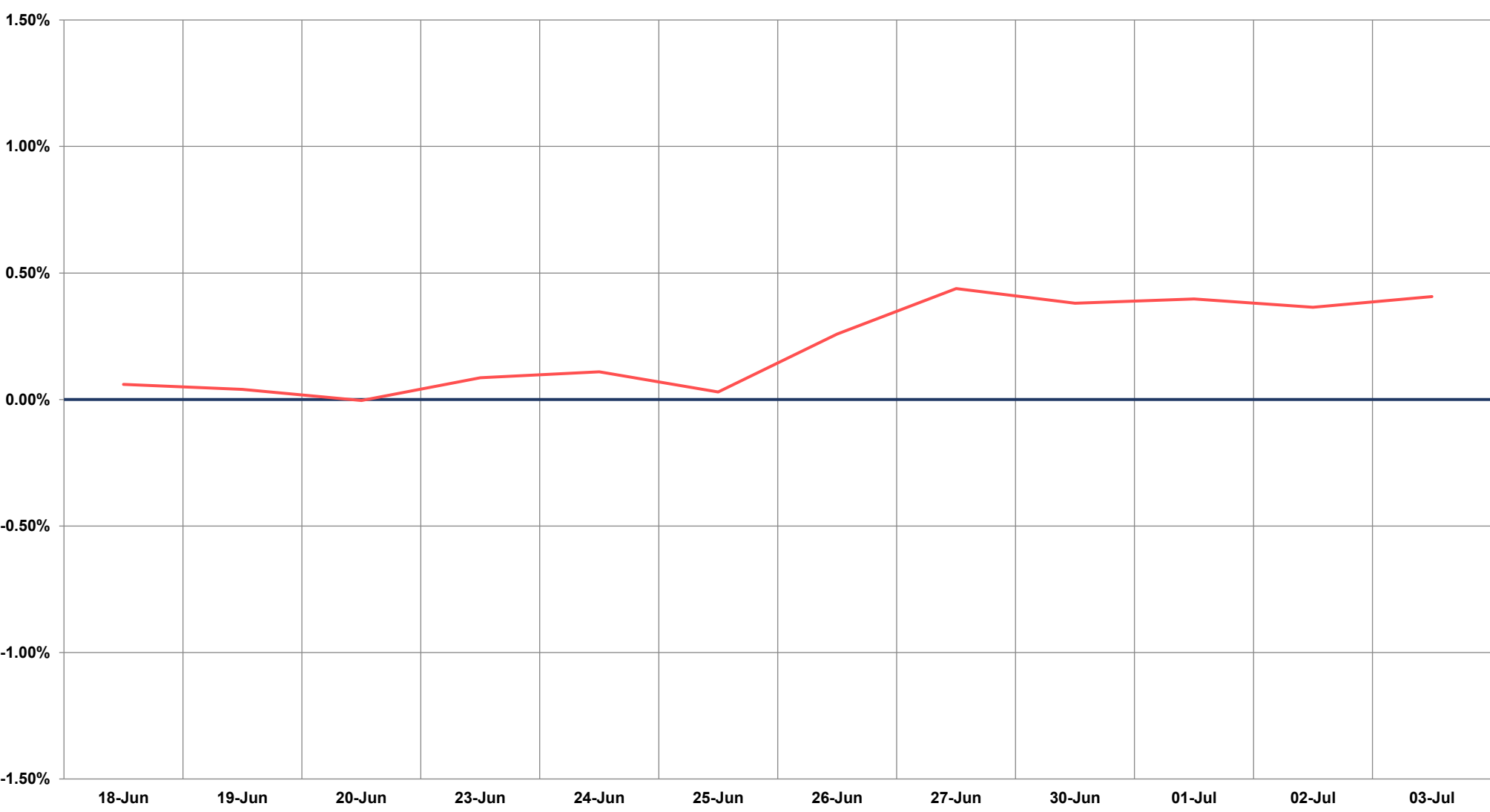
# TECHNICAL VIEWS



## NIFTY FUTURES



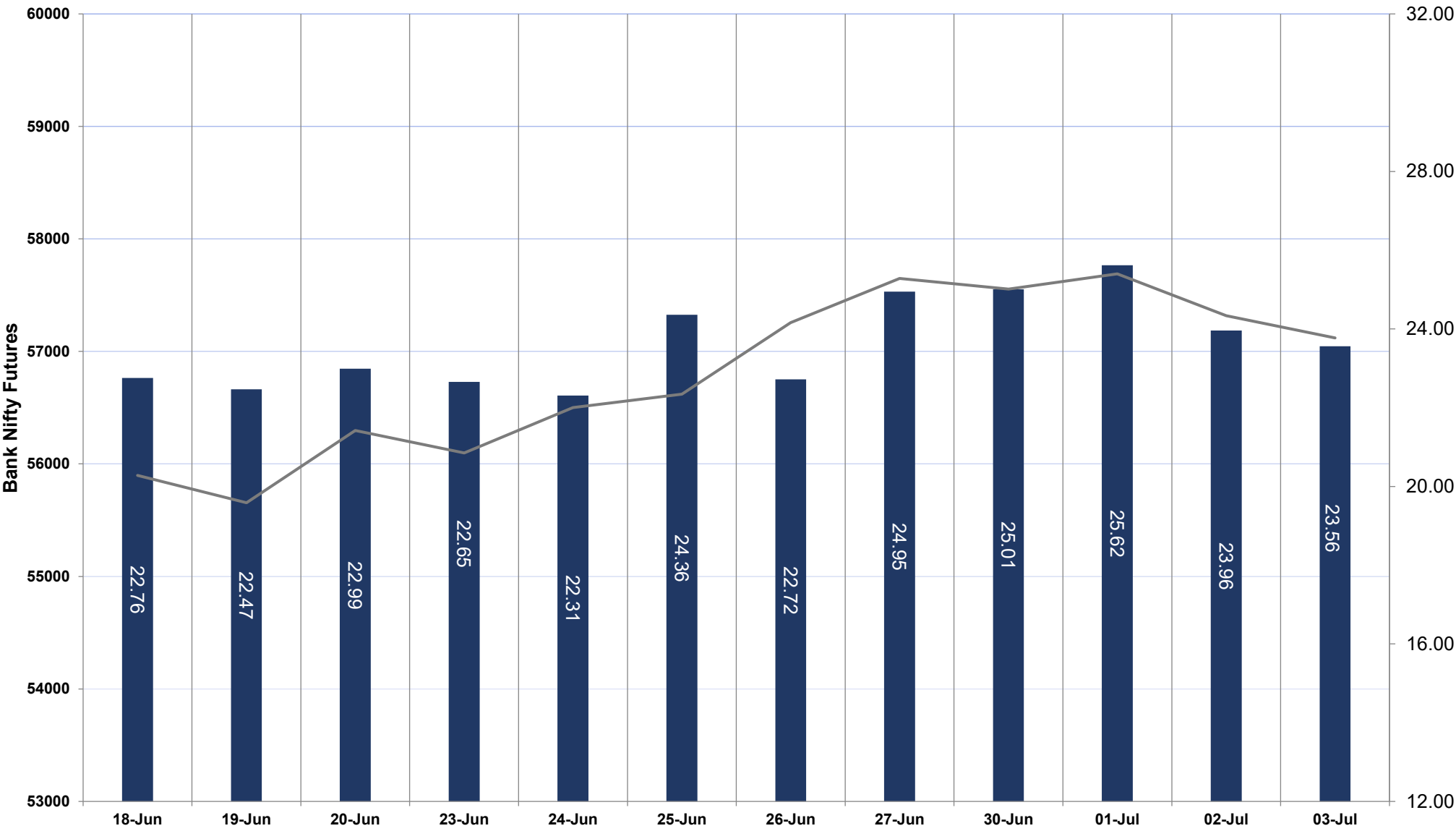
## SPREAD: FUTURE & SPOT



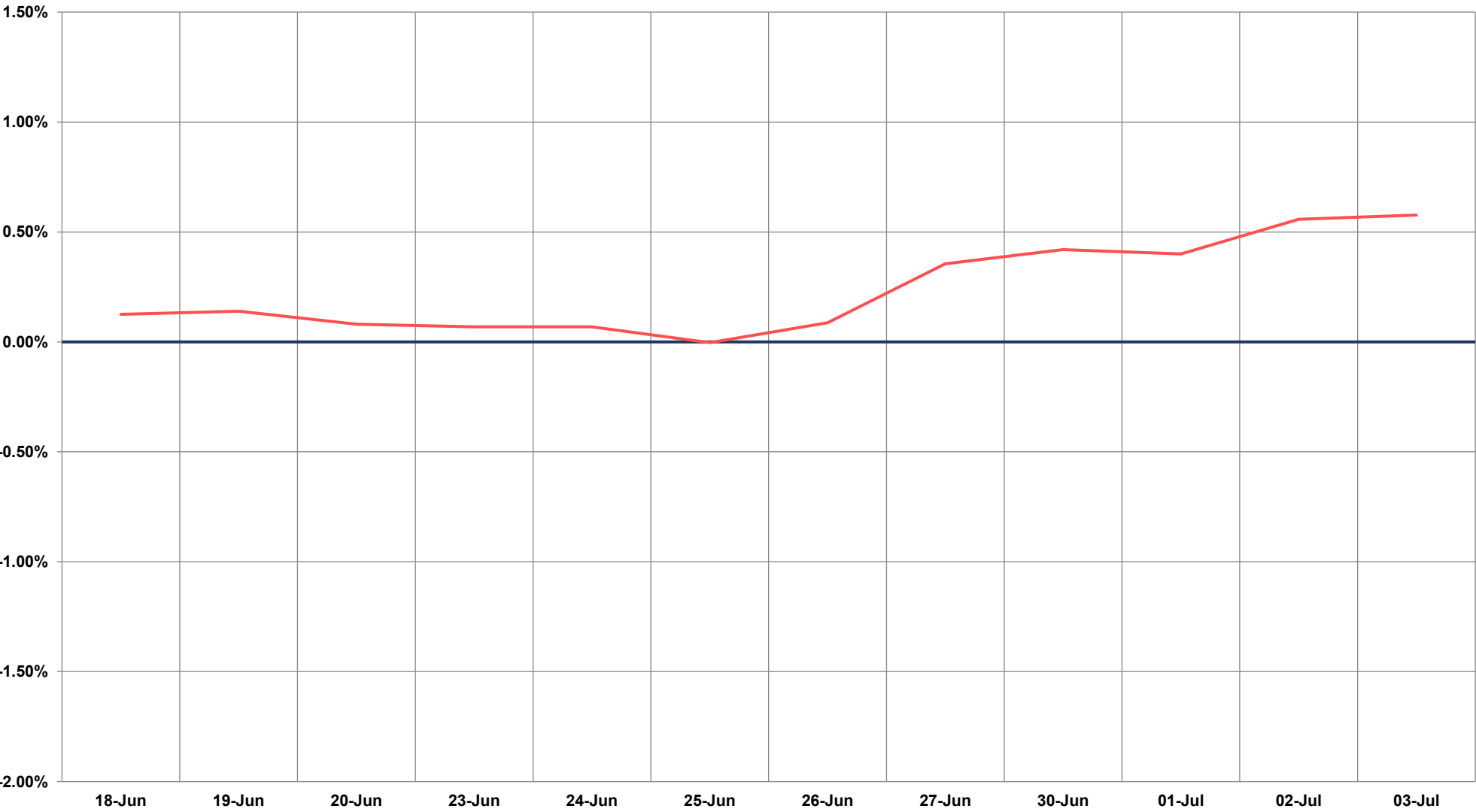
# TECHNICAL VIEWS



## BANK NIFTY FUTURES



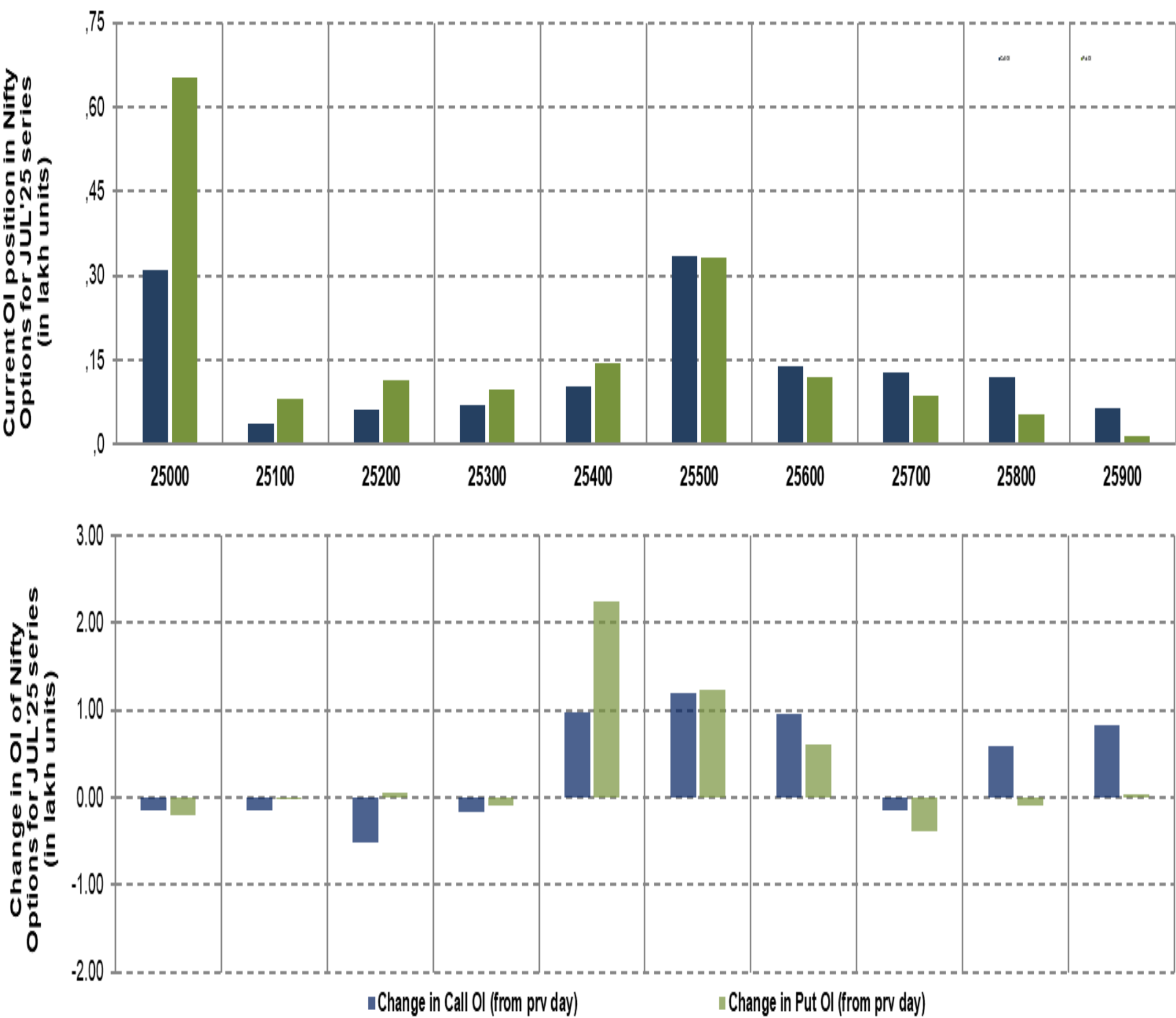
## SPREAD: FUTURE & SPOT







NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.12 million in Open Interests is **Strike Price of 25500**
- **Most Active Nifty Put** with a addition of 0.12 millions in Open Interests is **Strike Price of 25500**
- **Maximum Open Interest an outstanding** was 3.35 millions for Calls at **Strike Price of 25500**
- **Maximum Open Interest an outstanding** was 6.53 millions for puts at **Strike Price of 25000**

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