



MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

July 07, 2025



Indian equity benchmarks ended flat with positive bias on Monday, amid geopolitical tensions in the Middle East. After making a slightly negative start, indices hovered near the neutral lines throughout the session, amid US Treasury Secretary Scott Bessent's comments that tariffs will be enforced starting August 1 for countries that haven't finalised an agreement with the Trump administration.

Some of the important factors in today's trade:

Foreign fund outflows: Sentiments remained downbeat as Foreign Institutional Investors (FIIs) offloaded equities worth Rs 760.11 crore on Friday, according to exchange data.

GTRI cautions against imports of GM farm products from US: Some concerns also came as Economic think tank GTRI cautioned that allowing genetically modified (GM) farm products from the US under the proposed trade pact would have implications for India as it may affect the country's agri exports to regions like the European Union.

India needs nominal GDP growth rate of 10% annually to achieve Viksit Bharat goal: Traders took note of report that the Confederation of Indian Industry (CII) President Rajiv Memani has said India needs an average nominal Gross Domestic Product (GDP) growth rate of 10% annually.

Global front: European markets were trading mostly in green as relief at the extension of the tariff deadline to August 1. Asian markets ended mixed as Japan's leading index increased more than expected in May after falling in the previous three months. The leading index, which measures future economic activity, rose to 105.3 in May from 104.2 in April.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	83442.50	9.61	0.01
NIFTY	25461.30	0.30	0.00
MIDCAP	46743.36	-70.98	-0.15
SMLCAP	54651.08	-179.26	-0.33
BSEFMC	20477.54	301.71	1.50
HEALTHCARE	44877.43	-18.23	-0.04
AUTO	53539.13	-79.58	-0.15
POWER	6869.05	21.46	0.31
REALTY	7544.98	4.70	0.06
BSE IT	38067.81	-249.26	-0.65
BANKEX	63575.99	-85.84	-0.13
OIL GAS	28444.89	88.36	0.31
METAL	31663.97	-190.74	-0.60
INDIA VIX	12.56	0.25	1.99

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1152	1791	117
BSE	1649	2436	176

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	5042	6224	(19)
NSE CASH	76916	88821	(13)
NSE F&O	101424	127576	(20)

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	22.92	3.65	1.27
SENSEX	23.89	4.44	1.15

KEY NUMBERS TRACKER



FII – DII ACTIVITY IN CASH SEGMENT (₹ in Crs)			
FII-DII*	Buy	Sell	Net
DII	10849	9109	1740
FII	8872	8550	323

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)			
FII	Buy	Sell	Net
Ind. Futures	2131.82	2799.86	(668)
Ind. Options	753074.66	756859.13	(3784)
Stk. Futures	13232.63	13425.87	(193)
Stk. Options	14034.56	14027.29	7

PUT-CALL RATIO		
Index	Current	Previous
NIFTY	0.79	0.80
BANK NIFTY	0.94	1.01

DOLLAR INDEX			
Dollar Index	Current	Previous	% Change
DXY	97.57	96.89	0.40

10-YEARS G-SEC YIELD			
Country	Current	Previous	% Change
INDIA	6.294	6.290	-0.02
USA	4.388	4.328	1.67

KEY COMMODITIES TRACKER (in \$)			
Commodity	Current	Change Points	% Change
Gold	3329.91	-7.09	-0.21
Silver	36.68	-0.21	-0.56
Crude-Oil	67.29	0.85	1.29
Brent-Crude	69.03	0.55	0.80

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES				
Expiry		Close	Change Points	% Change
29 JULY-25	USD-INR	85.97	0.50	0.59
29 JULY-25	EUR-INR	100.90	0.08	0.07
29 JULY-25	GBP-INR	117.03	0.22	0.18
29 JULY-25	JPY- INR	59.75	-0.04	-0.07

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS						
Index	Close	S2	S1	Pivot	R1	R2
NIFTY	25461	25370	25416	25453	25498	25535
SENSEX	83443	83153	83298	83407	83552	83662
NIFTY FUTURES	25539	25431	25485	25530	25584	25629
BANK NIFTY	56949	56666	56808	56980	57121	57294
CNX IT	38867	38571	38719	38948	39096	39325
CNX MIDCAP	59516	59227	59371	59565	59709	59902
CNX SMALLCAP	18950	18828	18889	18975	19036	19122
INDIA VIX	12.56	11.58	12.07	12.43	12.92	13.28

INDEX TREND ANALYSIS			
Index	Daily	Weekly	Monthly
NIFTY	Buy	Buy	Buy
SENSEX	Buy	Buy	Buy
NIFTY FUTURES	Buy	Buy	Buy
BANK NIFTY	Neutral	Buy	Buy
CNX IT	Neutral	Neutral	Neutral
CNX MIDCAP	Neutral	Buy	Buy
CNX SMALLCAP	Neutral	Buy	Buy
INDIA VIX	Neutral	Sell	Neutral

SECURITIES BAN IN F&O TRADES FOR 07-07-2025
RBLBANK

TECHNICAL VIEWS



NIFTY

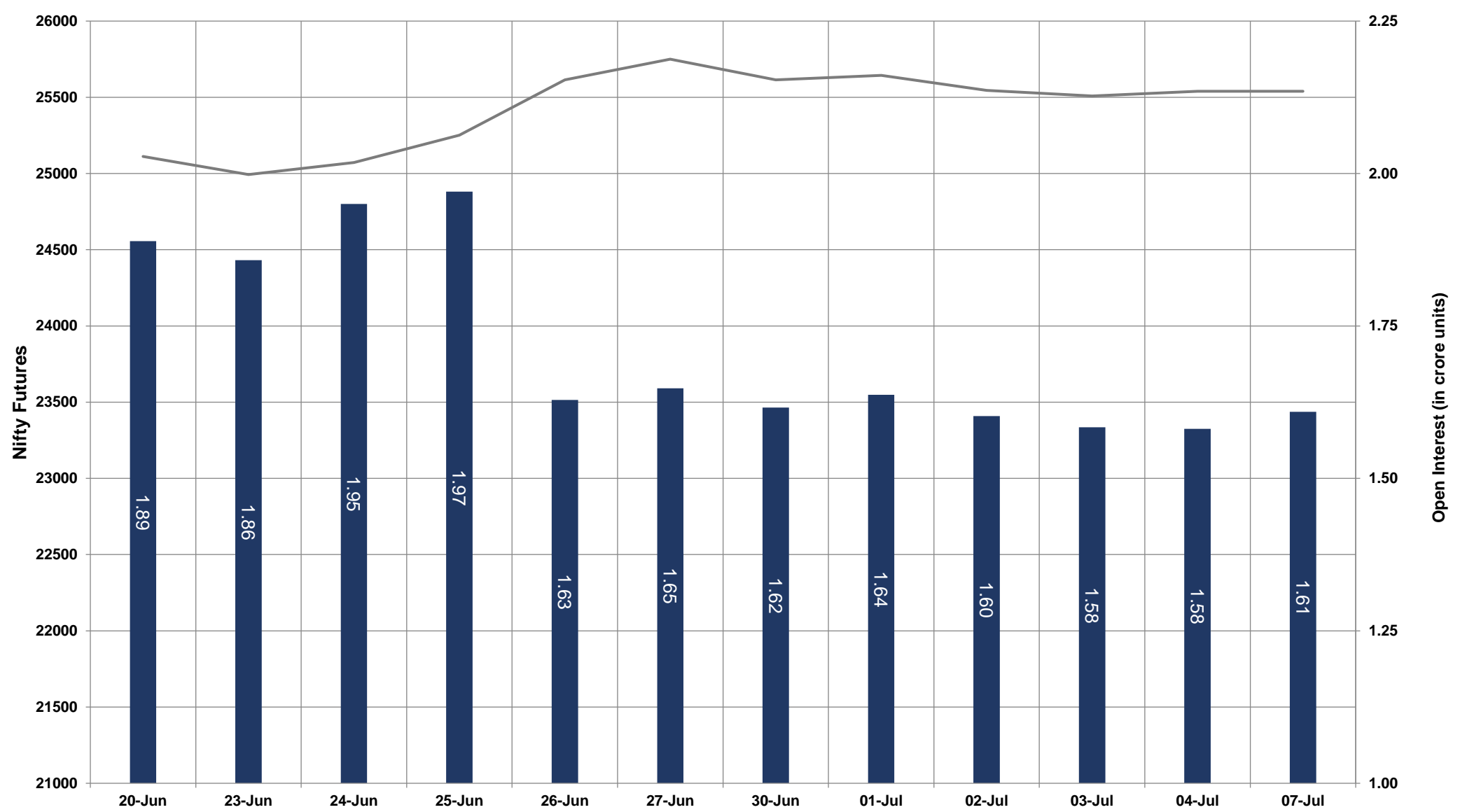


- Nifty Cash = **25461.30 (0.00%)**
- Resistance levels = **25620** and **25750**
- Support levels = **25350** and **25250**

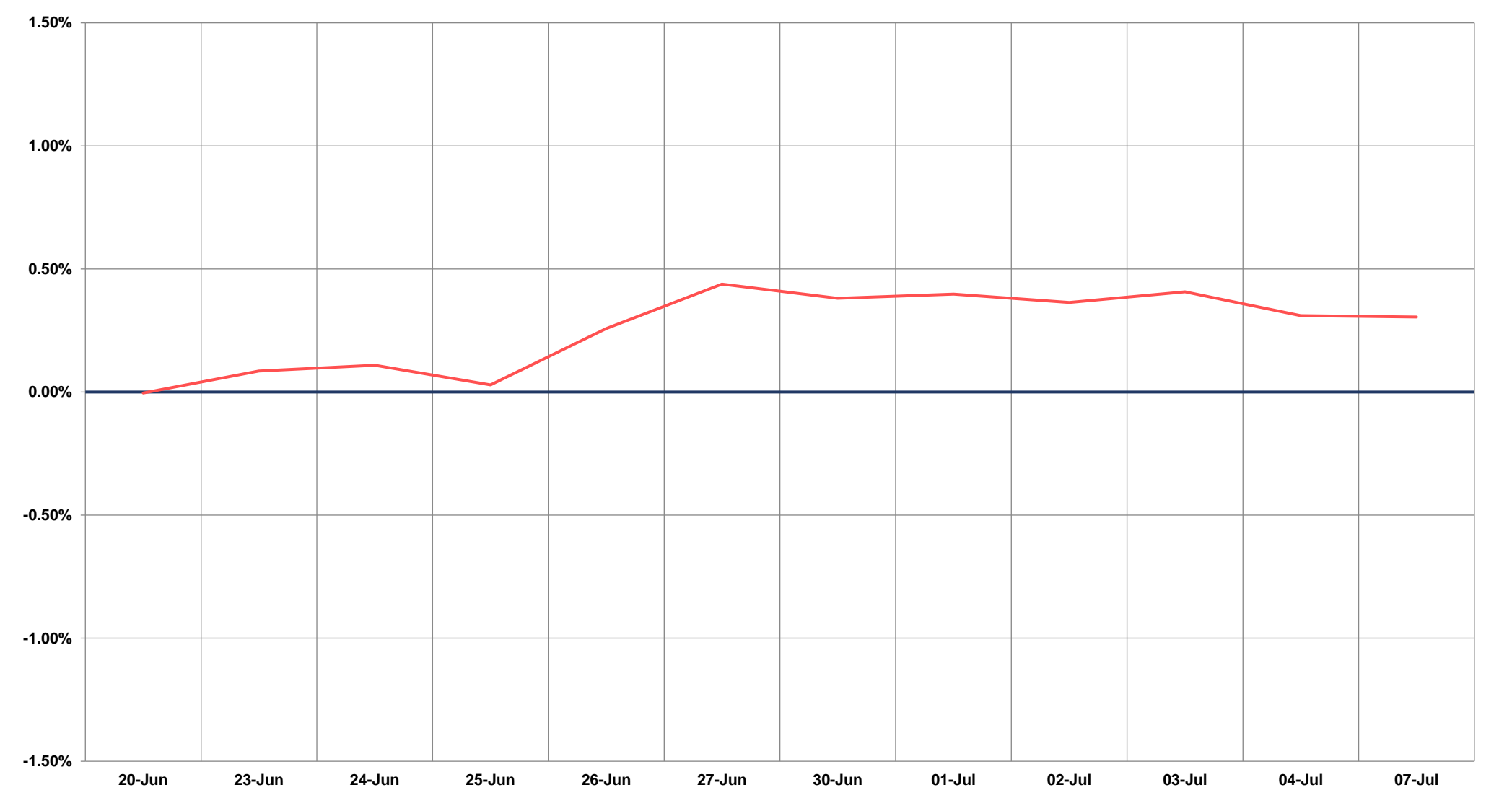
TECHNICAL VIEWS



NIFTY FUTURES



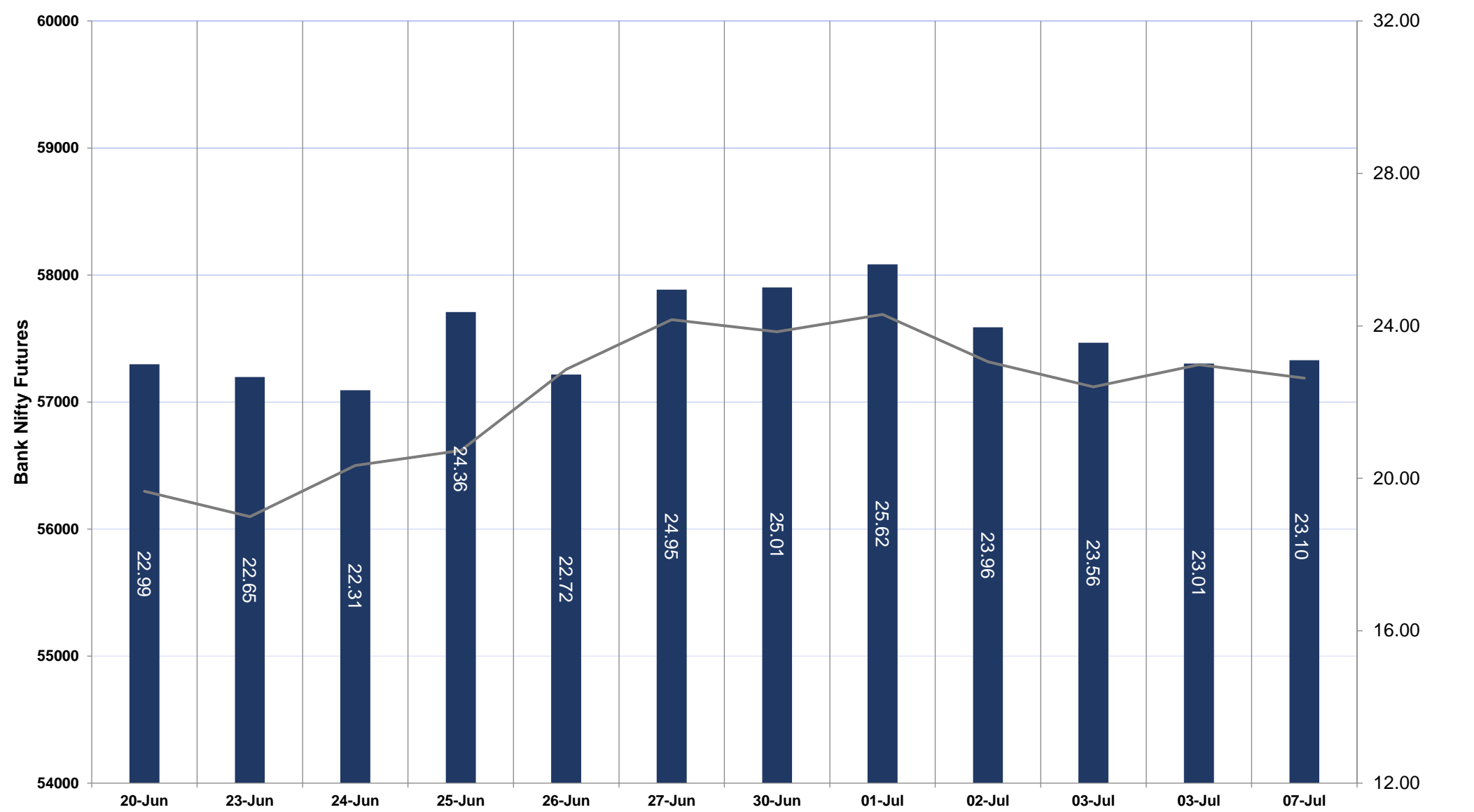
SPREAD: FUTURE & SPOT



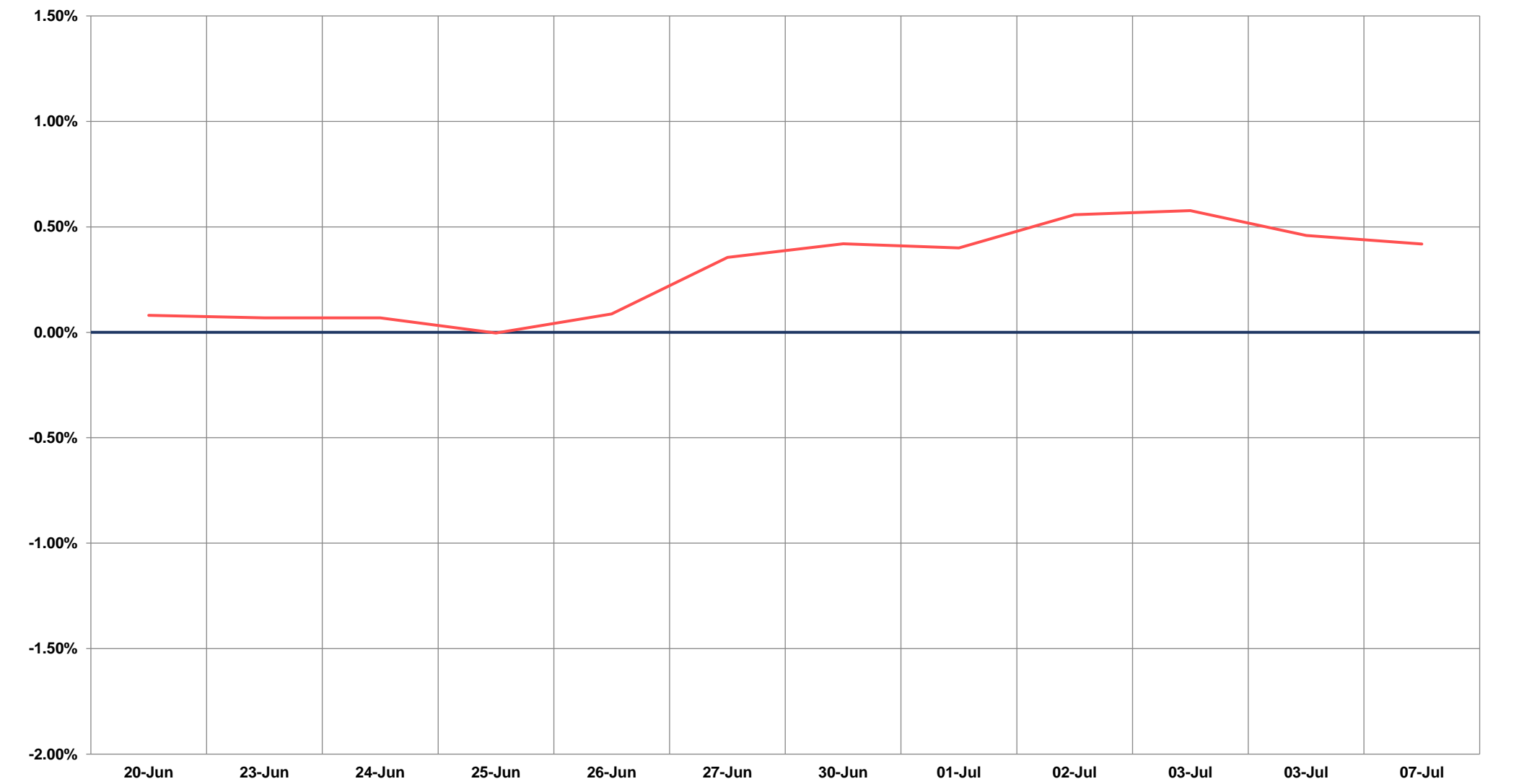
TECHNICAL VIEWS



BANK NIFTY FUTURES

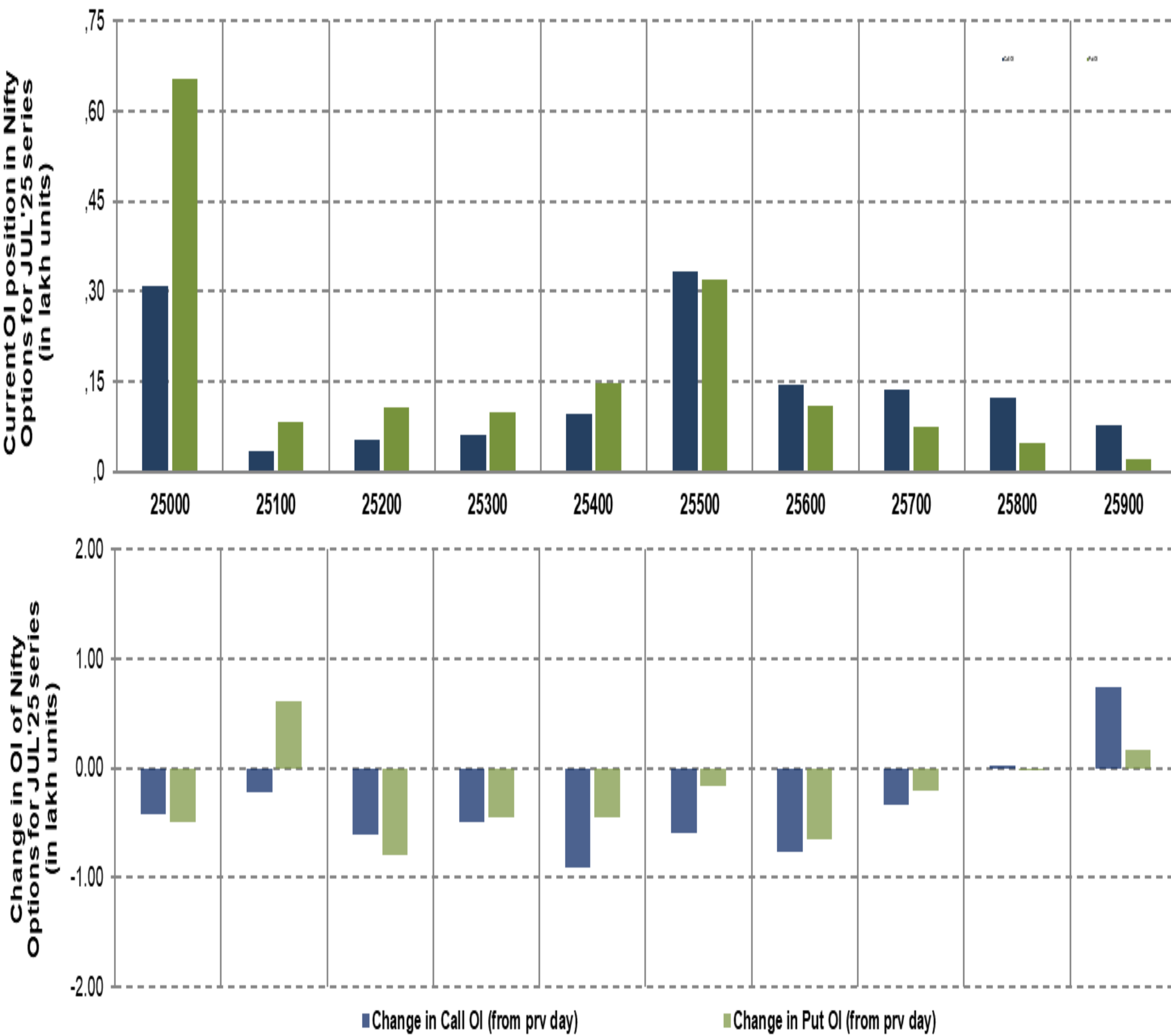


SPREAD: FUTURE & SPOT





NIFTY OPTIONS



- **Most Active Nifty Call** with an subtraction of 0.09 **million** in Open Interests is **Strike Price of 25400**
- **Most Active Nifty Put** with a subtraction of 0.07 **millions** in Open Interests is **Strike Price of 25200**
- **Maximum Open Interest an outstanding** was 3.33 **millions** for Calls at **Strike Price of 25500**
- **Maximum Open Interest an outstanding** was 6.26 **millions** for puts at **Strike Price of 25000**

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