



MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

July 08, 2025



Indian equity benchmarks ended near day's high points on Tuesday, as investors turned positive ahead of a mini-trade deal announcement between the U.S. and India expected later tonight. After making a cautious start, indices traded near neutral lines for most of the session, as sentiments remained subdued due to global uncertainty following U.S. President Donald Trump's announcement of steep import tariffs on key trading partners. In final hour of trade, markets added some gains and settled higher.

Some of the important factors in today's trade:

Foreign fund inflows: Traders took some support with exchange data showed Foreign Institutional Investors (FIIs) bought equities worth Rs 321.16 crore on Monday.

US extends suspension of reciprocal tariffs on India until August 1: Traders took some support as US extended the suspension of reciprocal tariffs on India until August 1, 2025. This extension allows both nations additional time to resolve outstanding issues and potentially finalize an interim trade deal.

Debt securitisation volumes inch up to Rs 49,000 crore during Q1FY26: Traders took note of report that Crisil Ratings in its latest report has said that debt securitisation volumes have inched up to Rs 49,000 crore during April-June 2025 (Q1FY26) as compared to Rs 45,000 crore recorded in the year-ago period.

Global front: European markets were trading mostly in green, while Asian markets ended mostly higher amid renewed uncertainty over U.S. President Donald Trump's tariff policies after he again extended the implementation of new reciprocal tariffs until at least August 1.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	83712.51	270.01	0.32
NIFTY	25522.50	61.20	0.24
MIDCAP	46748.41	5.05	0.01
SMLCAP	54558.85	-92.23	-0.17
BSEFMC	20425.89	-51.65	-0.25
HEALTHCARE	44515.04	-362.39	-0.81
AUTO	53342.26	-196.87	-0.37
POWER	6916.81	47.76	0.70
REALTY	7626.32	81.34	1.08
BSE IT	38176.09	108.28	0.28
BANKEX	64036.82	460.83	0.72
OIL GAS	28553.07	108.18	0.38
METAL	31647.74	-16.23	-0.05
INDIA VIX	12.20	-0.37	-2.91

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1350	1561	113
BSE	1854	2176	138

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	6442	5042	28
NSE CASH	91044	76916	18
NSE F&O	115101	101424	13

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	22.97	3.66	1.28
SENSEX	23.97	4.46	1.15

KEY NUMBERS TRACKER



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

FII-DII*	Buy	Sell	Net
DII	12924	11593	1331
FII	12039	11997	42

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)

FII	Buy	Sell	Net
Ind. Futures	1982.24	2251.15	(269)
Ind. Options	715600.84	718308.41	(2708)
Stk. Futures	15914.28	17570.43	(1656)
Stk. Options	16789.37	17329.54	(540)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	0.93	0.79
BANK NIFTY	0.98	0.94

DOLLAR INDEX

Dollar Index	Current	Previous	% Change
DXY	97.55	97.48	0.08

10-YEARS G-SEC YIELD

Country	Current	Previous	% Change
INDIA	6.306	6.294	0.19
USA	4.418	4.388	0.52

KEY COMMODITIES TRACKER (in \$)

Commodity	Current	Change Points	% Change
Gold	3306.02	-28	-0.84
Silver	36.68	-0.10	-0.28
Crude-Oil	68.36	0.45	0.67
Brent-Crude	70.15	0.60	0.86

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES				
Expiry		Close	Change Points	% Change
29 JULY-25	USD-INR	85.75	-0.21	-0.25
29 JULY-25	EUR-INR	100.73	-0.17	-0.16
29 JULY-25	GBP-INR	116.57	-0.44	-0.37
29 JULY-25	JPY- INR	59.33	-0.41	-0.69

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS						
Index	Close	S2	S1	Pivot	R1	R2
NIFTY	25523	25374	25448	25498	25572	25622
SENSEX	83713	83124	83418	83615	83910	84107
NIFTY FUTURES	25612	25447	25529	25582	25665	25718
BANK NIFTY	57256	56781	57018	57161	57399	57541
CNX IT	38983	38479	38731	38985	39237	39490
CNX MIDCAP	59415	58660	59038	59354	59731	60047
CNX SMALLCAP	18895	18598	18747	18900	19049	19202
INDIA VIX	12.20	11.67	11.94	12.32	12.59	12.97

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	Neutral	Buy	Buy
CNX SMALLCAP	Neutral	Buy	Buy
INDIA VIX	Sell	Sell	Neutral

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

TECHNICAL VIEWS



NIFTY

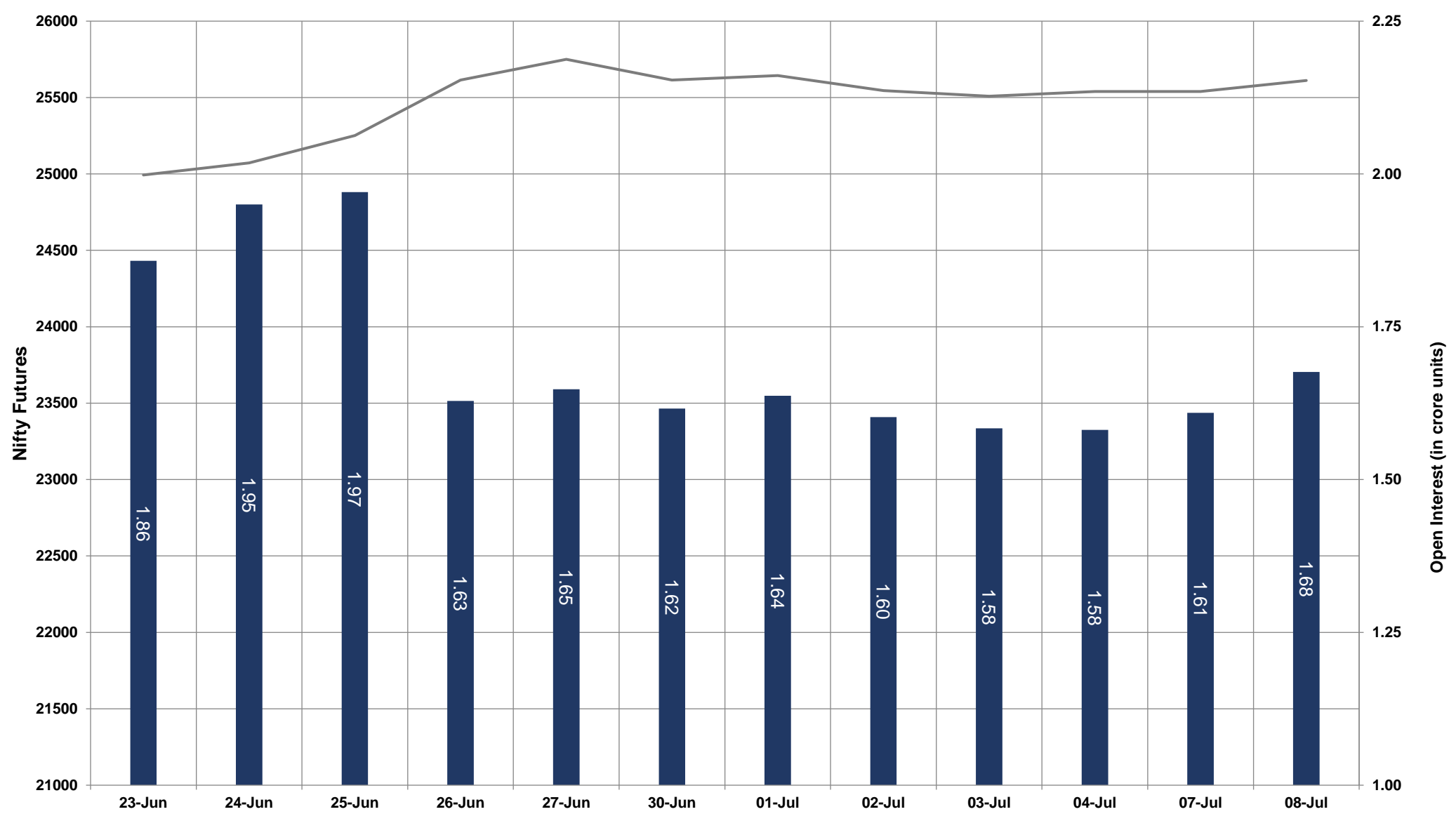


- Nifty Cash = **25522.50 (0.24%)**
- Resistance levels = **25600** and **25750**
- Support levels = **25400** and **25350**

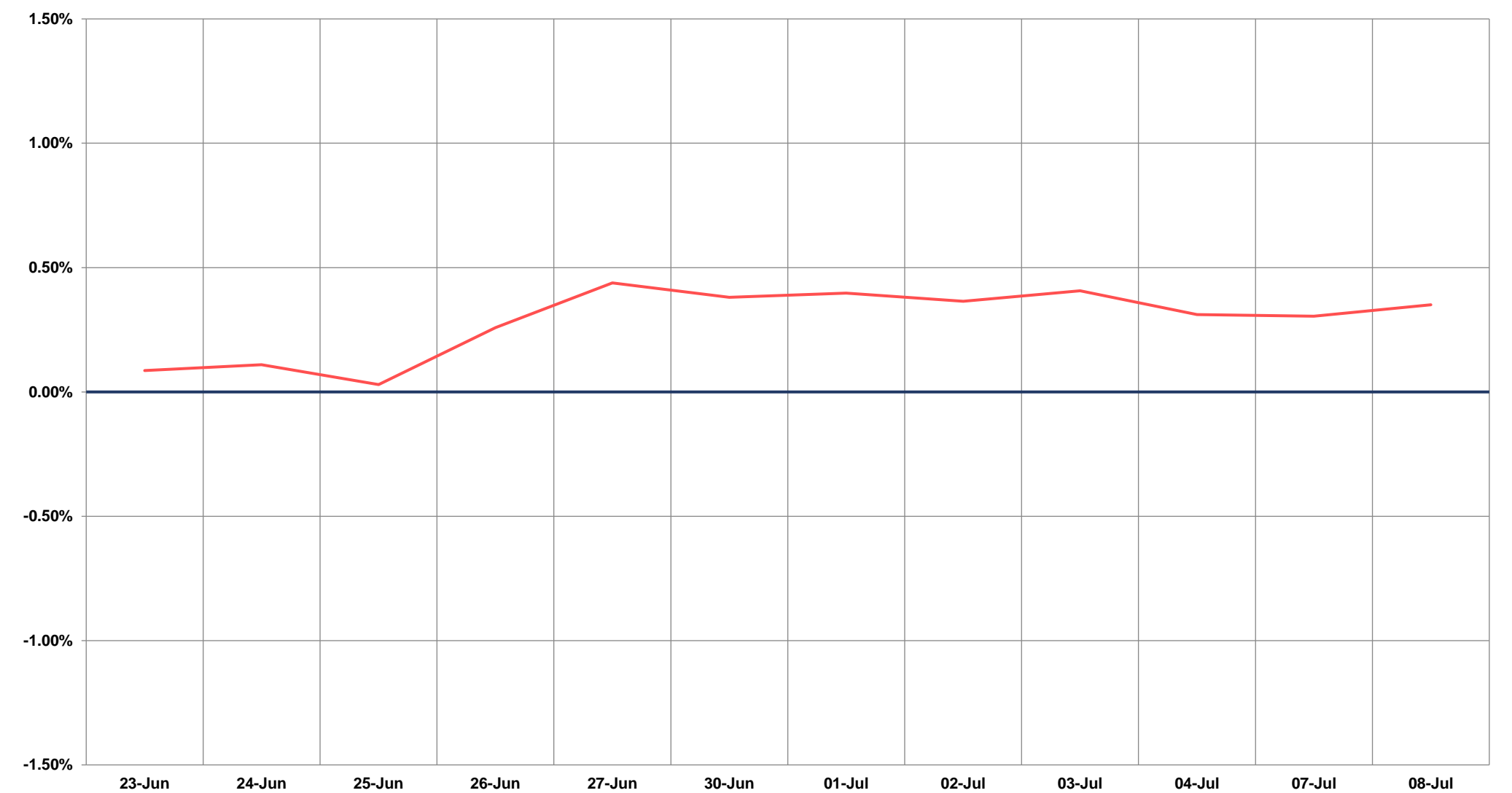
TECHNICAL VIEWS



NIFTY FUTURES



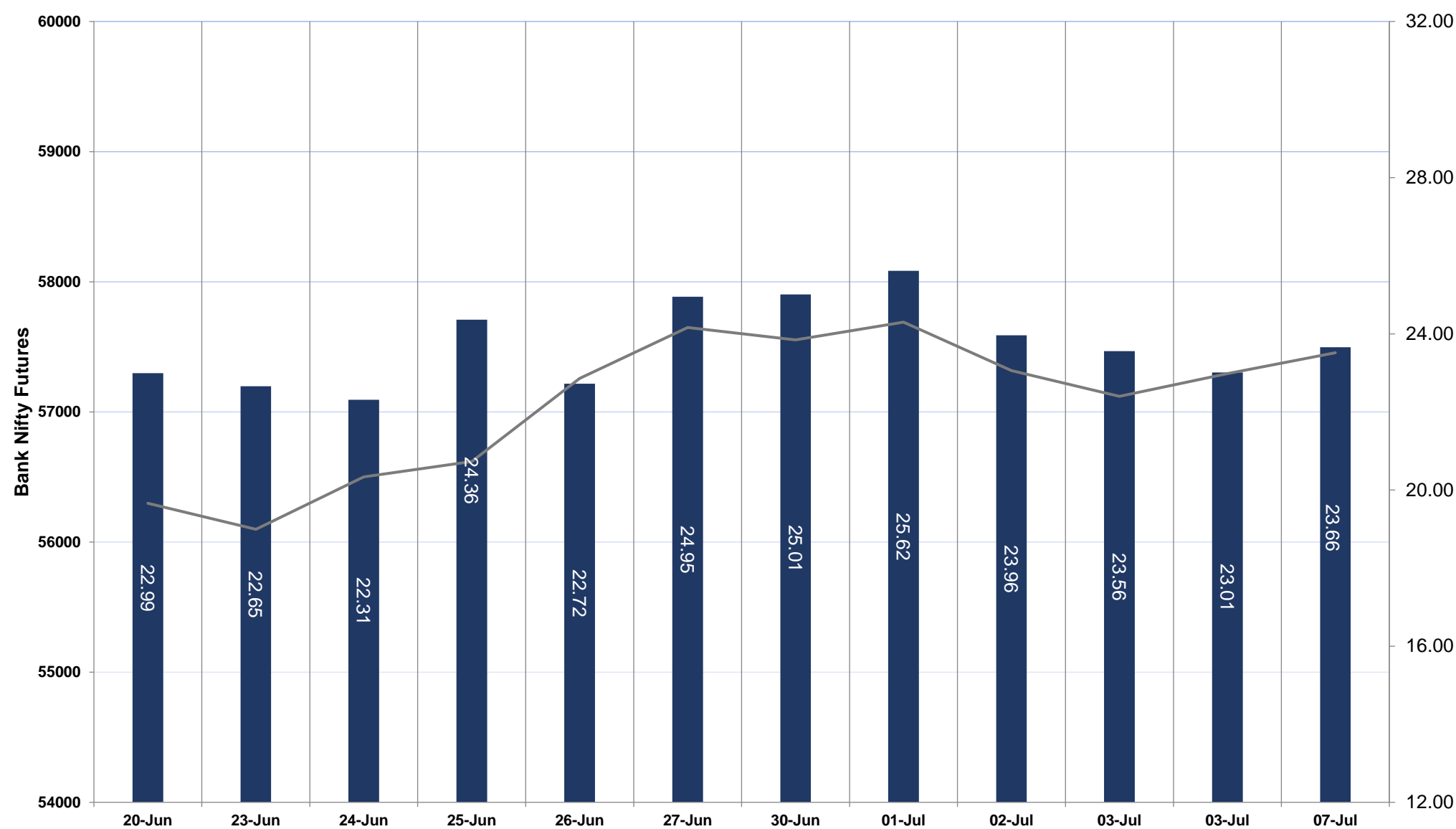
SPREAD: FUTURE & SPOT



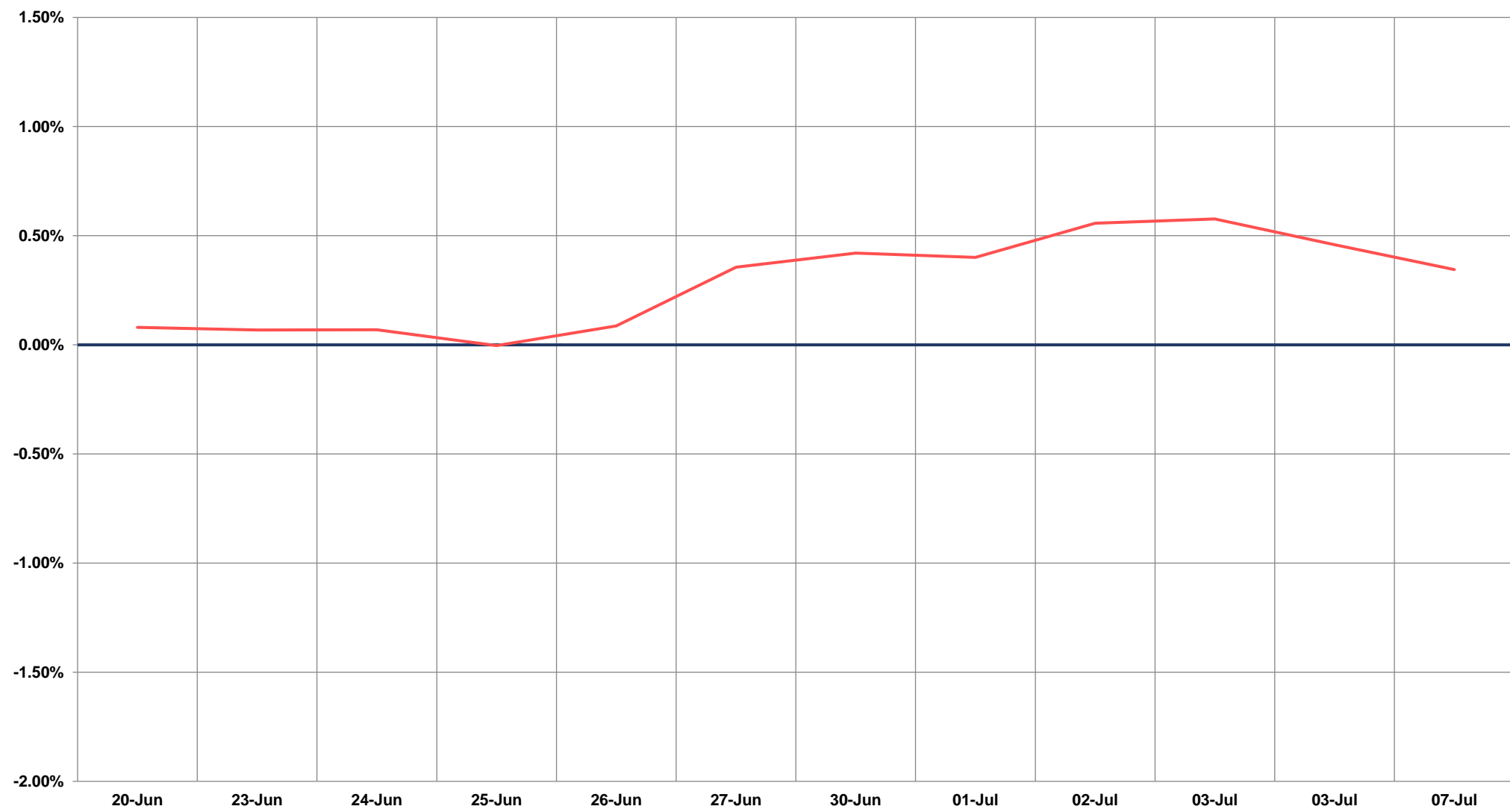
TECHNICAL VIEWS



BANK NIFTY FUTURES



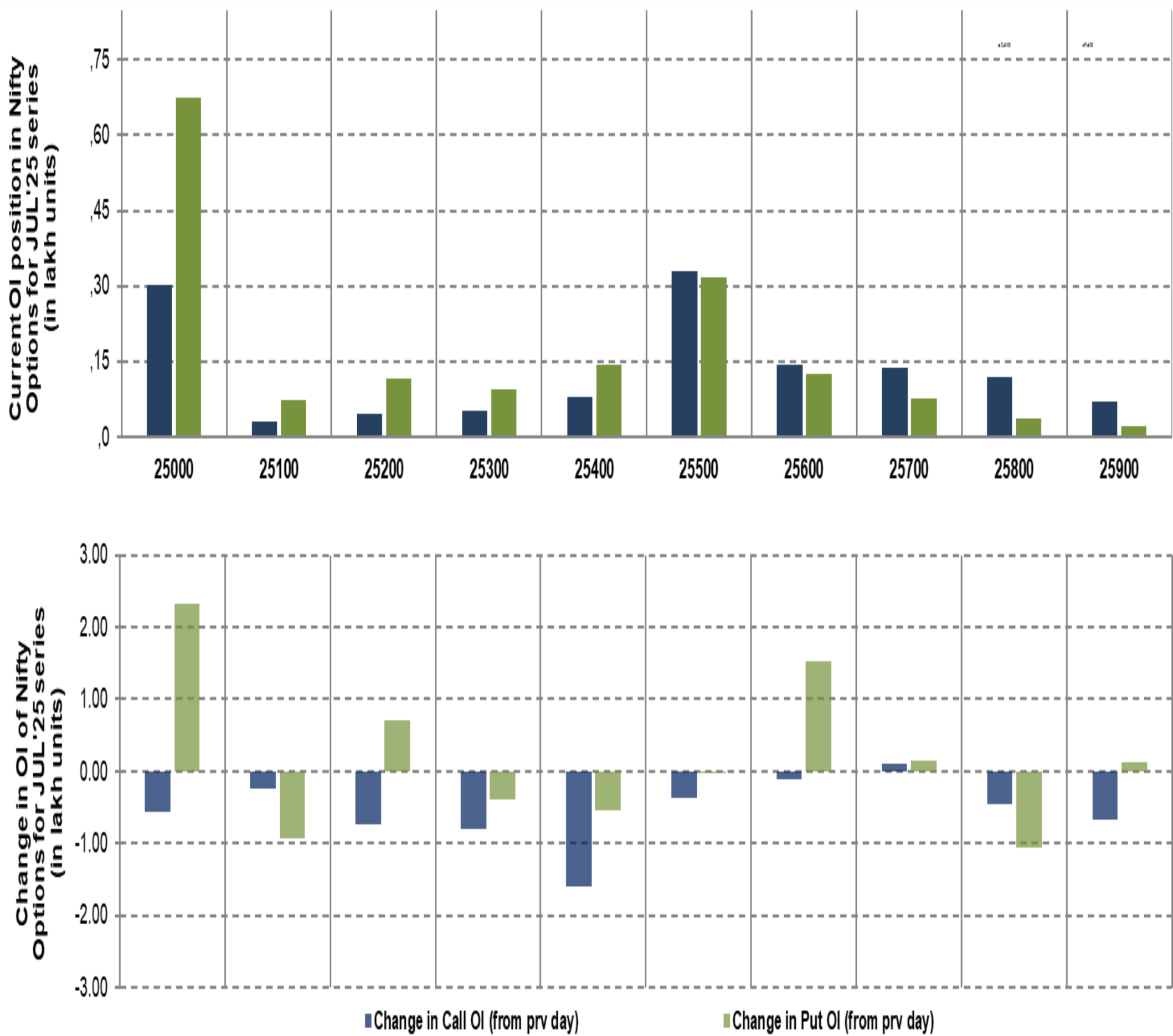
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an subtraction of 0.07 million in Open Interests is **Strike Price of 25300**
- **Most Active Nifty Put** with a addition of 0.23 millions in Open Interests is **Strike Price of 25000**
- **Maximum Open Interest an outstanding** was 3.30 millions for Calls at **Strike Price of 25500**
- **Maximum Open Interest an outstanding** was 6.75 millions for puts at **Strike Price of 25000**

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