



# MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

July 09, 2025



Indian equity benchmarks closed marginally lower on Wednesday, ahead of weakly F&O expiry. After making a negative start, indices hovered around the neutral lines for most of the session, as sentiments remained subdued after U.S. President Donald Trump offered no exceptions to his August 1 tariff start date and announced a 50 percent tariff on copper imports, expanding trade measures already in place for steel and aluminum. In final hour of trade, markets drifted into the red and ended with modest losses.

Some of the important factors in today's trade:

**Foreign fund outflows:** Traders remained cautious as exchange data showed Foreign Institutional Investors (FIIs) offloaded equities worth Rs 26.12 crore on Tuesday.

**India in talks with Australia to source rare earth minerals:** Traders took note of an Australian official's statement that India is in talks with Australia to source rare earth minerals. The development assumes significance in the wake of rare earth magnet shortage caused by Chinese export restrictions.

**India could be among countries expected to finalise trade deal with US soon:** Traders overlooked Economic think tank Global Trade Research Initiative's (GTRI) statement that India could be among the countries expected to finalise a trade deal with the US soon.

**Global front:** European markets were trading in green as traders waited for an update on the US-EU trade deal. Asian markets ended mostly in green after US President Donald Trump expanded his trade war with steep new tariffs targeting copper, semiconductors and pharmaceuticals.

# MARKET SELFIE



## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	83536.08	-176.43	-0.21
NIFTY	25476.10	-46.40	-0.18
MIDCAP	46723.58	-24.83	-0.05
SMLCAP	54805.20	246.35	0.45
BSEFMC	20577.63	151.74	0.74
HEALTHCARE	44480.38	-34.66	-0.08
AUTO	53558.01	215.75	0.40
POWER	6925.23	8.42	0.12
REALTY	7519.31	-107.01	-1.40
BSE IT	37920.28	-255.81	-0.67
BANKEX	63969.15	-67.67	-0.11
OIL GAS	28149.59	-403.48	-1.41
METAL	31200.70	-447.04	-1.41
INDIA VIX	11.94	-0.25	-2.09

## ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1476	1453	103
BSE	1992	2013	137

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	6355	6442	(1)
NSE CASH	95306	91044	5
NSE F&O	124252	115101	8

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	22.93	3.66	1.27
SENSEX	23.92	4.45	1.15

# KEY NUMBERS TRACKER



FII – DII ACTIVITY IN CASH SEGMENT (₹ in Crs)			
FII-DII*	Buy	Sell	Net
DII	12976	11939	1037
FII	12604	12529	74

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)			
FII	Buy	Sell	Net
Ind. Futures	1746	2737	(991)
Ind. Options	1111789	1115075	(3287)
Stk. Futures	16858	17416	(558)
Stk. Options	21961	20463	1498

PUT-CALL RATIO		
Index	Current	Previous
NIFTY	0.70	0.93
BANK NIFTY	0.95	0.98

DOLLAR INDEX			
Dollar Index	Current	Previous	% Change
DXY	97.55	97.52	0.03

10-YEARS G-SEC YIELD			
Country	Current	Previous	% Change
INDIA	6.314	6.306	0.13
USA	4.335	4.418	-1.83

KEY COMMODITIES TRACKER (in \$)			
Commodity	Current	Change Points	% Change
Gold	3315.62	13.26	0.40
Silver	36.38	-0.15	-0.43
Crude-Oil	68.27	0.10	0.16
Brent-Crude	70.10	0.12	0.17

# CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES				
Expiry		Close	Change Points	% Change
29 JULY-25	USD-INR	85.77	0.00	0.00
29 JULY-25	EUR-INR	100.56	-0.16	-0.16
29 JULY-25	GBP-INR	116.60	-0.01	-0.01
29 JULY-25	JPY- INR	59.17	-0.16	-0.28

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS						
Index	Close	S2	S1	Pivot	R1	R2
NIFTY	25476	25359	25417	25483	25542	25607
SENSEX	83536	83167	83352	83567	83751	83966
NIFTY FUTURES	25559	25453	25506	25576	25629	25699
BANK NIFTY	57214	56928	57071	57181	57324	57433
CNX IT	38681	38281	38481	38740	38940	39200
CNX MIDCAP	59340	59058	59199	59380	59520	59701
CNX SMALLCAP	12	11	12	12	12	13
INDIA VIX	19007.40	18853.27	18930.33	18984.12	19061.18	19114.97

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

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



# TECHNICAL VIEWS



## NIFTY

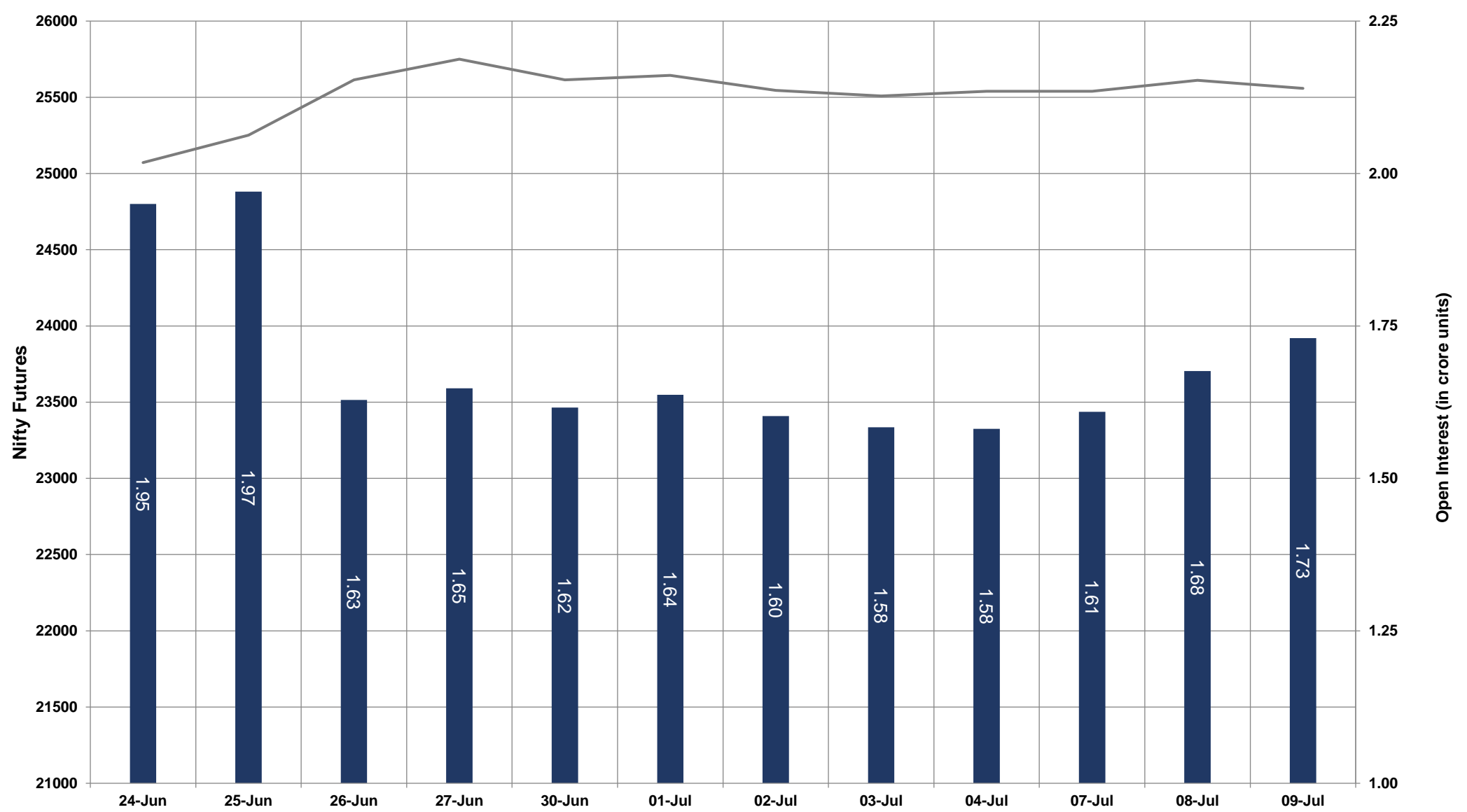


- Nifty Cash = **25476.10 (0.18%)**
- Resistance levels = **25550** and **25650**
- Support levels = **25350** and **25250**

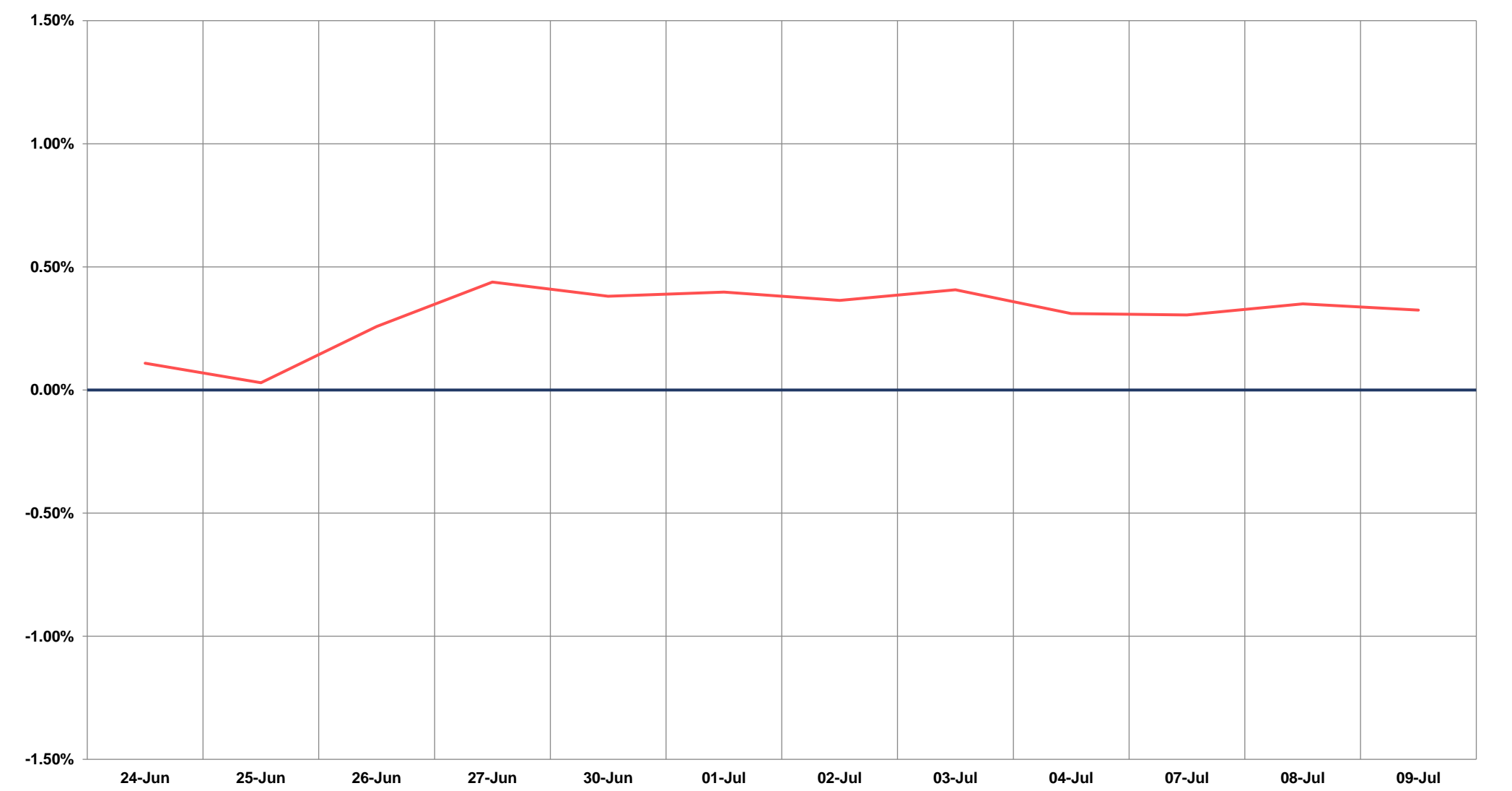
# TECHNICAL VIEWS



## NIFTY FUTURES



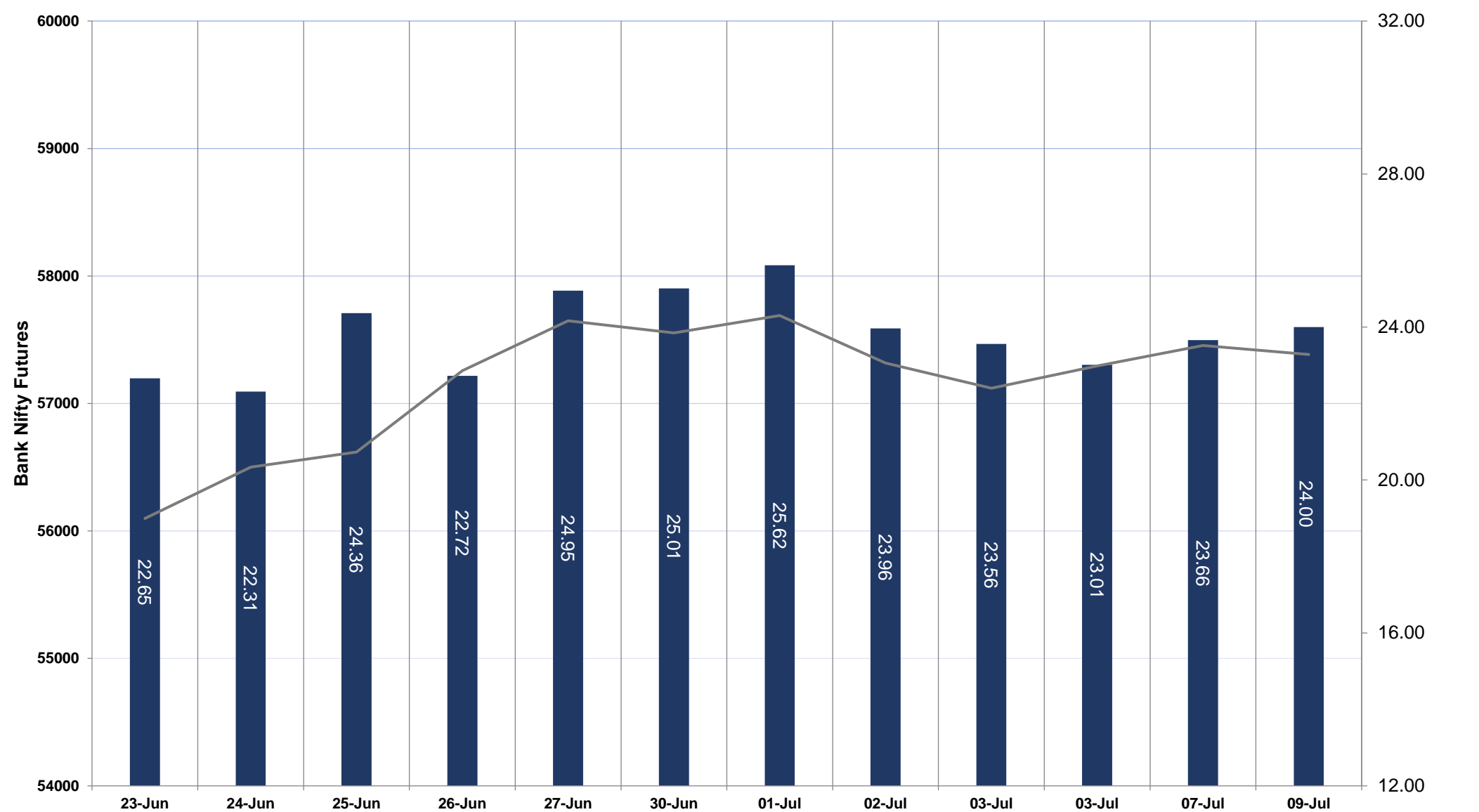
## SPREAD: FUTURE & SPOT



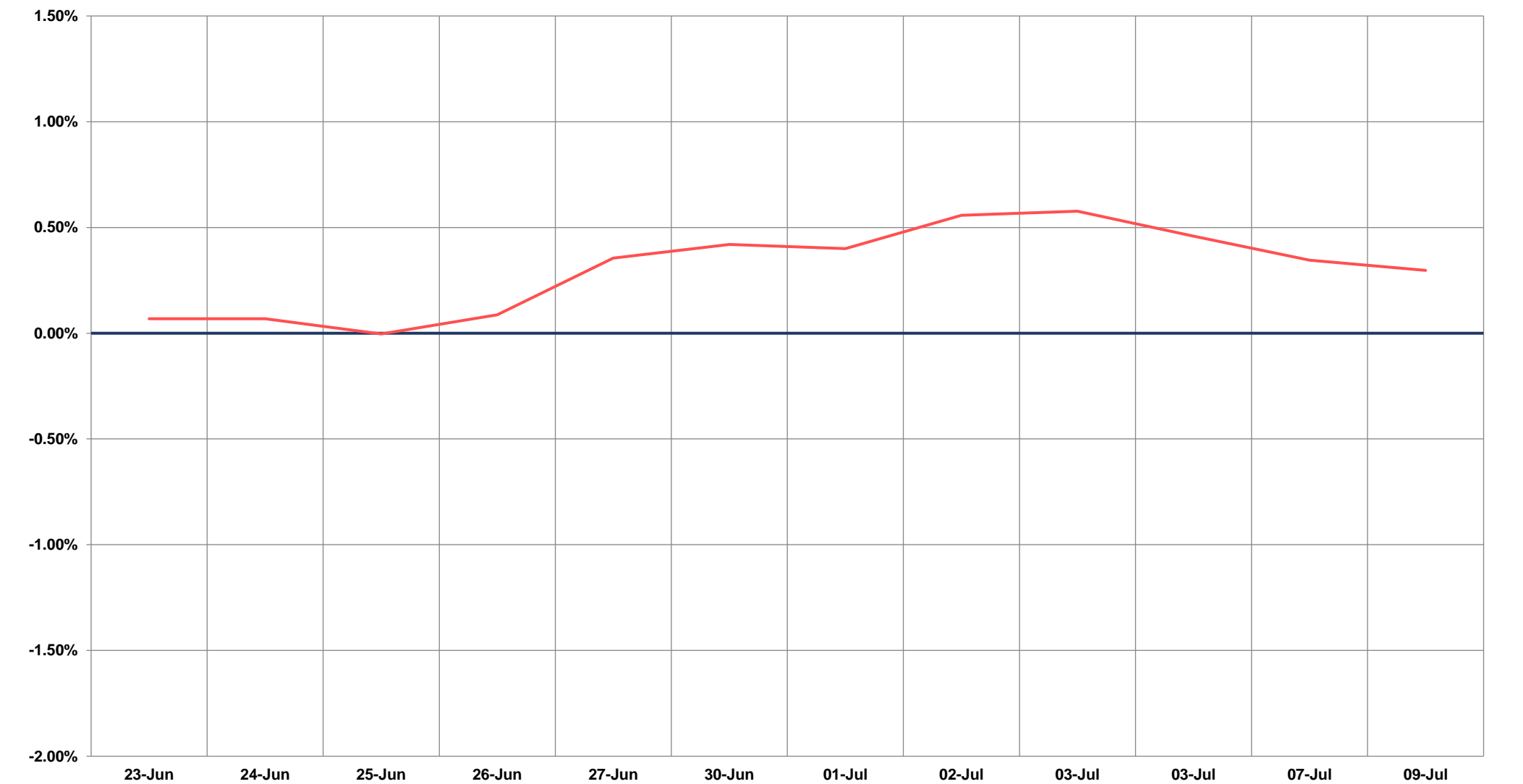
# TECHNICAL VIEWS



## BANK NIFTY FUTURES



## SPREAD: FUTURE & SPOT

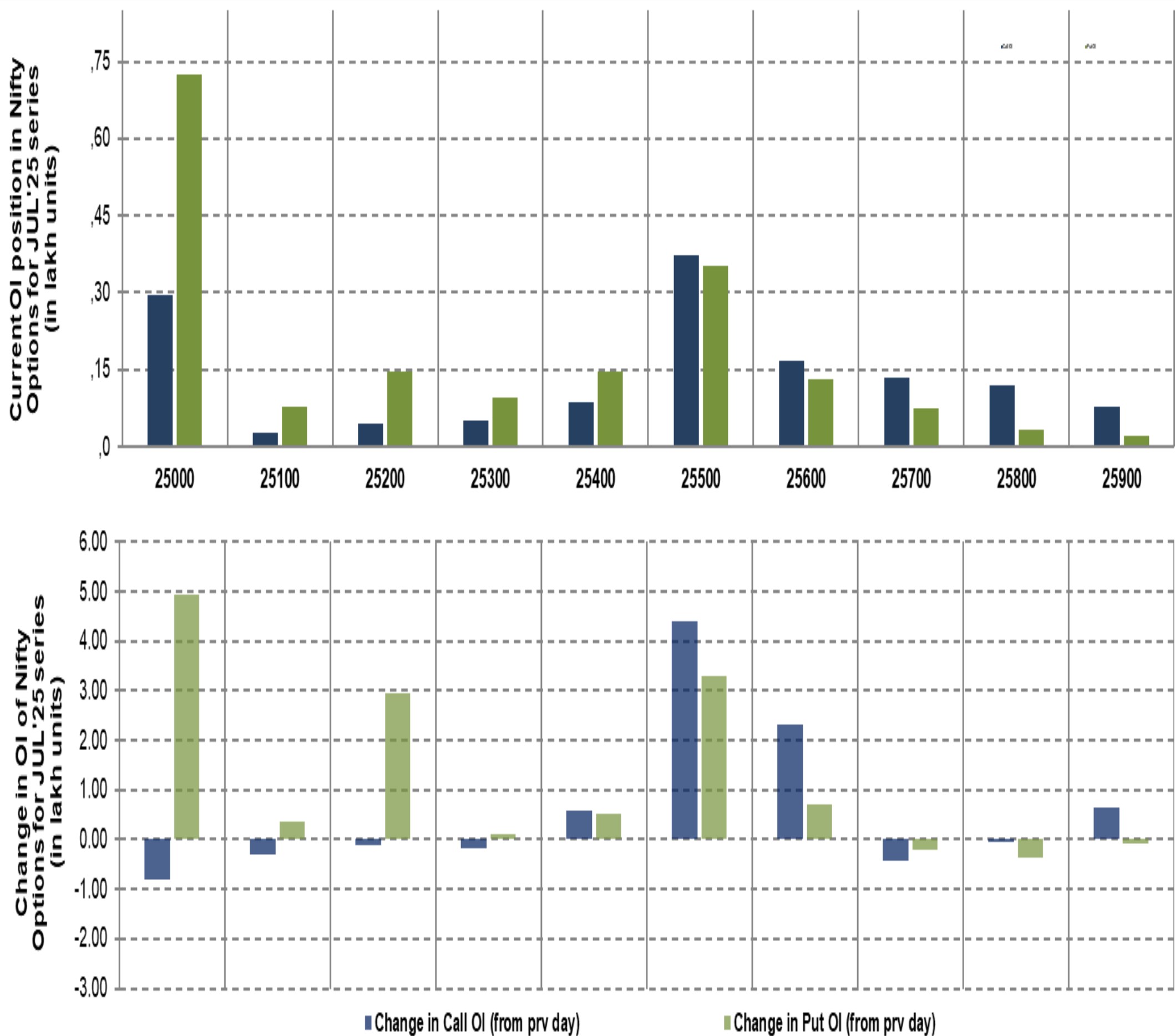




# TECHNICAL VIEWS



## NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.44 million in Open Interests is **Strike Price of 25500**
- **Most Active Nifty Put** with a addition of 0.49 millions in Open Interests is **Strike Price of 25000**
- **Maximum Open Interest an outstanding** was 3.74 millions for Calls at **Strike Price of 25500**
- **Maximum Open Interest an outstanding** was 7.25 millions for puts at **Strike Price of 25000**

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