



MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

July 10, 2025



Indian equity benchmarks closed lower on Thursday, weighed down by selling pressure in IT and TECK stocks. Traders remained cautious due to ongoing trade negotiations between the US and India, as well as the commencement of the Q1 FY26 earnings season. After making a slightly positive start, soon indices turned downward and stayed lower throughout the day, as traders were cautious with a private report stating that US President Donald Trump's threat to impose new tariffs on India over its participation in the BRICS forum puts New Delhi.

Some of the important factors in today's trade:

FTAs with Australia, UAE, UK to provide greater market access for domestic agri sector: Traders paid nod head towards Commerce and Industry Minister Piyush Goyal's statement that free trade agreements (FTAs) with developed markets such as Australia, UAE and UK will provide greater market access for the domestic agri sector.

PM Modi holds talks with Namibia President Nandi-Ndaitwah: Traders took note of report that Prime Minister Narendra Modi held talks with Namibian President Netumbo Nandi-Ndaitwah focused on imparting a new momentum to the bilateral ties.

India witnessing rapid surge in foreign investments: Traders overlooked Secretary of Ministry of Ports, Shipping and Waterways, Government of India T.K. Ramachandran's statement that India has become the fourth-largest economy, having surpassed \$4 trillion and is witnessing a rapid surge in foreign investments.

Global front: European markets were trading in green as optimism prevailed about a potential trade deal between the U.S. and the European Union. Asian markets ended mostly in green as the Bank of Korea left its interest rate unchanged, citing risks associated with rising household debt and escalating trade tensions.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	83190.28	-345.80	-0.41
NIFTY	25355.25	-120.85	-0.47
MIDCAP	46593.14	-130.44	-0.28
SMLCAP	54868.69	63.49	0.12
BSEFMC	20480.26	-97.37	-0.47
HEALTHCARE	44256.10	-224.28	-0.50
AUTO	53483.20	-74.81	-0.14
POWER	6920.03	-5.20	-0.08
REALTY	7571.26	51.95	0.69
BSE IT	37649.24	-271.04	-0.71
BANKEX	63758.93	-210.22	-0.33
OIL GAS	28162.91	13.32	0.05
METAL	31325.87	125.17	0.40
INDIA VIX	11.67	-0.26	-2.24

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1387	1521	90
BSE	1887	2142	132

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	6454	6355	2
NSE CASH	86650	95306	(9)
NSE F&O	1138303	124252	816

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	22.82	3.61	1.28
SENSEX	23.82	4.43	1.16

KEY NUMBERS TRACKER



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

FII-DII*	Buy	Sell	Net
DII	11582	11561	21
FII	11187	10601	586

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)

FII	Buy	Sell	Net
Ind. Futures	2456.21	4290.15	(1834)
Ind. Options	2292246.76	2285481.14	6766
Stk. Futures	16408.45	20259.41	(3851)
Stk. Options	21767.85	18726.78	3041

PUT-CALL RATIO

Index	Current	Previous
NIFTY	0.62	0.70
BANK NIFTY	0.86	0.95

DOLLAR INDEX

Dollar Index	Current	Previous	% Change
DXY	97.69	97.56	0.14

10-YEARS G-SEC YIELD

Country	Current	Previous	% Change
INDIA	6.318	6.314	0.06
USA	4.362	4.335	0.55

KEY COMMODITIES TRACKER (in \$)

Commodity	Current	Change Points	% Change
Gold	3317.20	-0.20	-0.01
Silver	36.86	0.46	1.23
Crude-Oil	66.66	-1.60	-2.36
Brent-Crude	68.75	-1.36	-1.95

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES				
Expiry		Close	Change Points	% Change
29 JULY-25	USD-INR	85.76	-0.01	-0.01
29 JULY-25	EUR-INR	100.60	0.05	0.04
29 JULY-25	GBP-INR	116.61	-0.02	-0.02
29 JULY-25	JPY- INR	59.00	-0.16	-0.28

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS						
Index	Close	S2	S1	Pivot	R1	R2
NIFTY	25355	25223	25289	25407	25473	25590
SENSEX	83190	82749	82969	83356	83577	83963
NIFTY FUTURES	25422	25292	25357	25476	25541	25660
BANK NIFTY	56956	56592	56774	57069	57251	57546
CNX IT	38377	37912	38144	38430	38662	38948
CNX MIDCAP	59160	58675	58918	59205	59448	59736
CNX SMALLCAP	12	11	11	12	12	12
INDIA VIX	18956.25	18794.45	18875.35	18983.45	19064.35	19172.45

INDEX TREND ANALYSIS			
Index	Daily	Weekly	Monthly
NIFTY	Neutral	Buy	Buy
SENSEX	Neutral	Buy	Buy
NIFTY FUTURES	Neutral	Buy	Buy
BANK NIFTY	Neutral	Buy	Buy
CNX IT	Neutral	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
HINDCOPPER, RBLBANK

TECHNICAL VIEWS



NIFTY

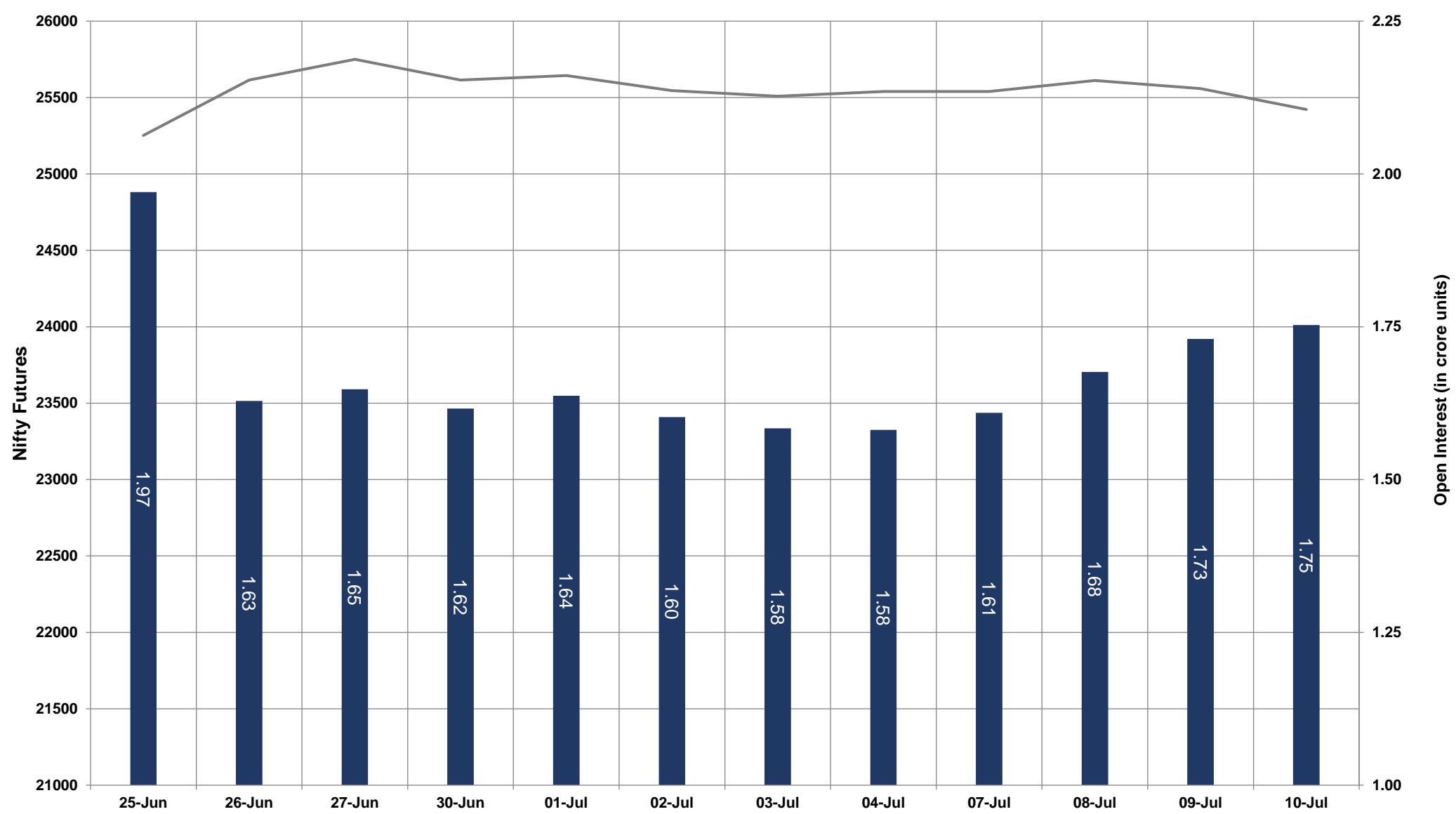


- Nifty Cash = **25355.25 (-0.47%)**
- Resistance levels = **25450** and **25550**
- Support levels = **25300** and **25200**

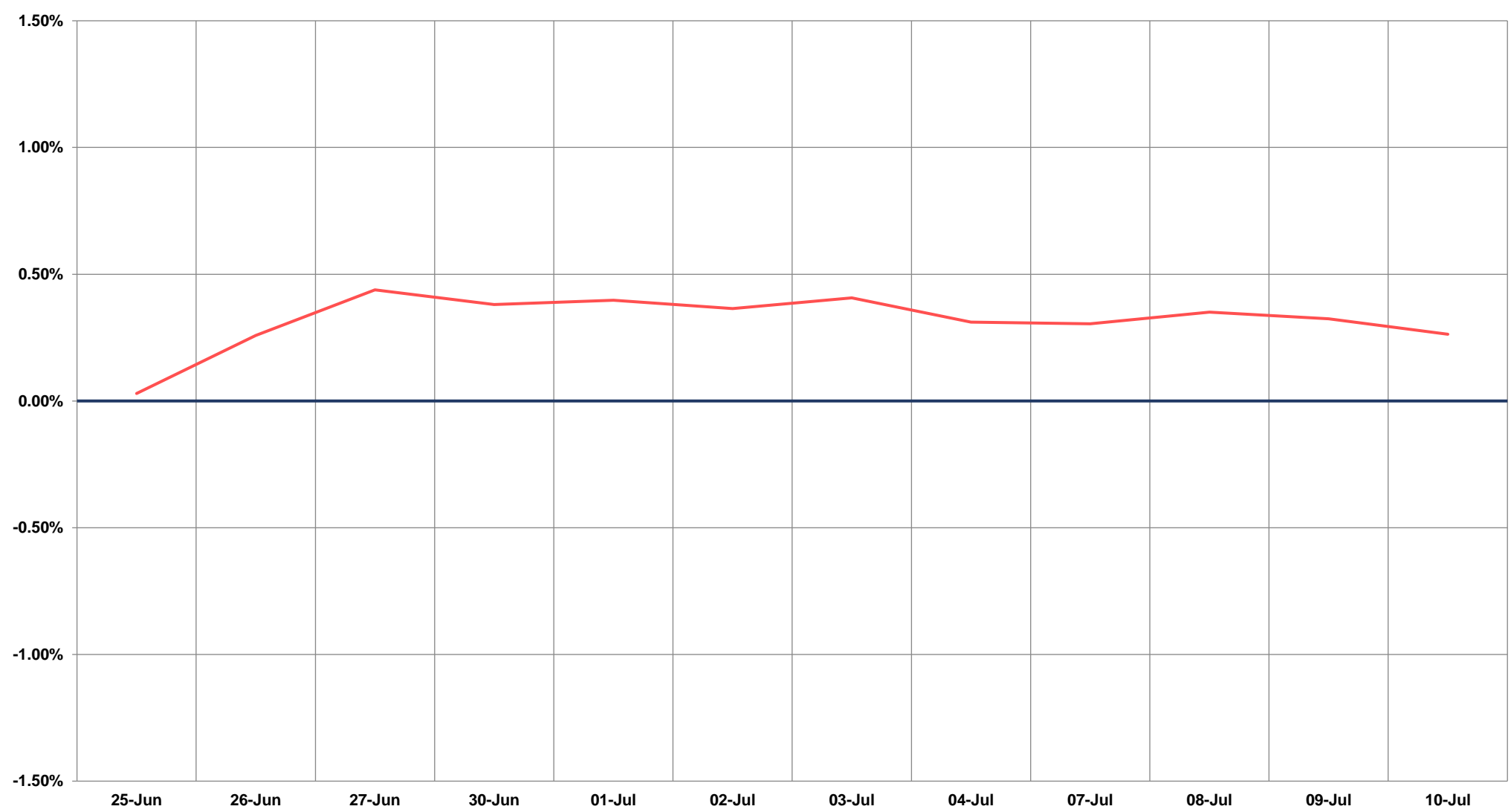
TECHNICAL VIEWS



NIFTY FUTURES



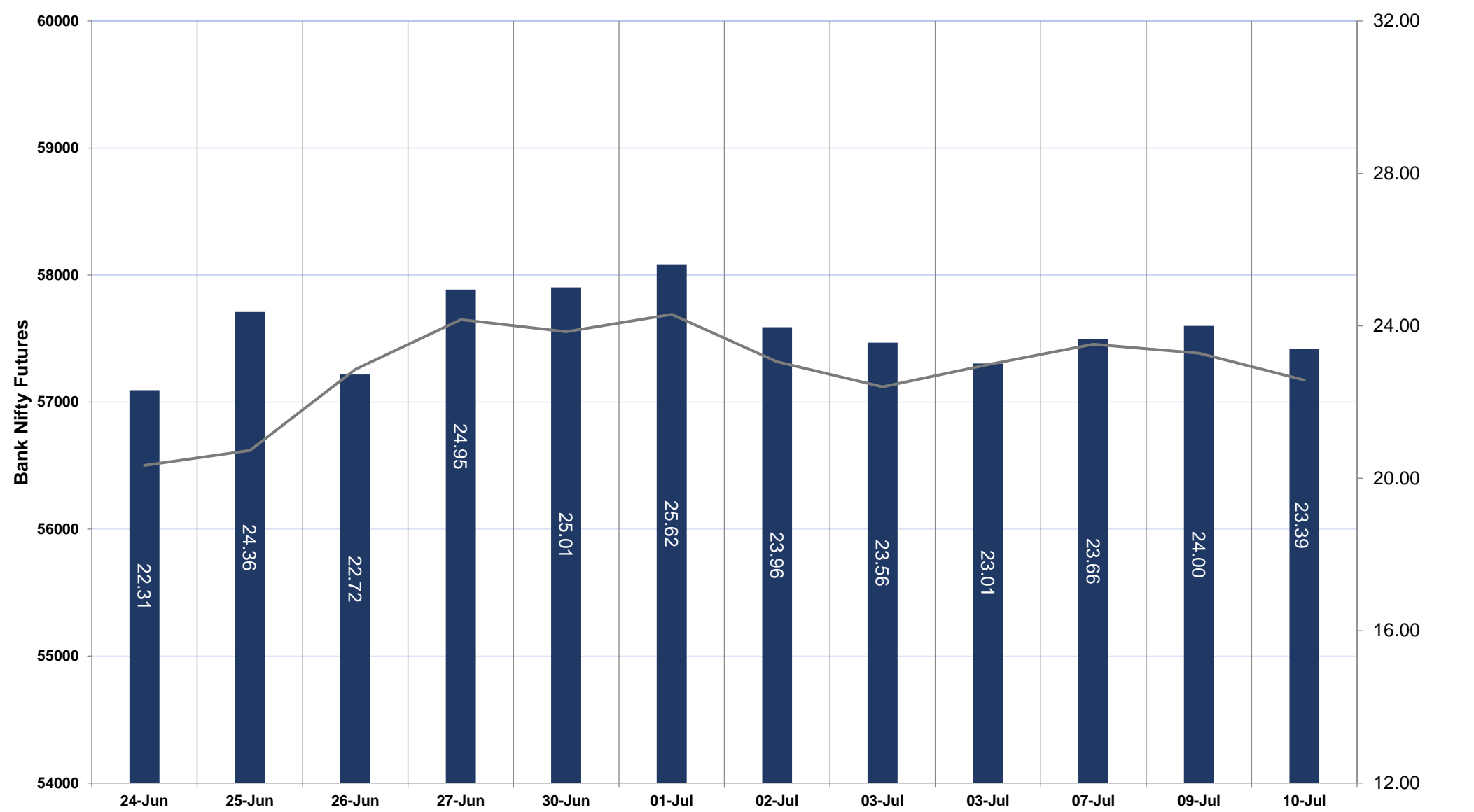
SPREAD: FUTURE & SPOT



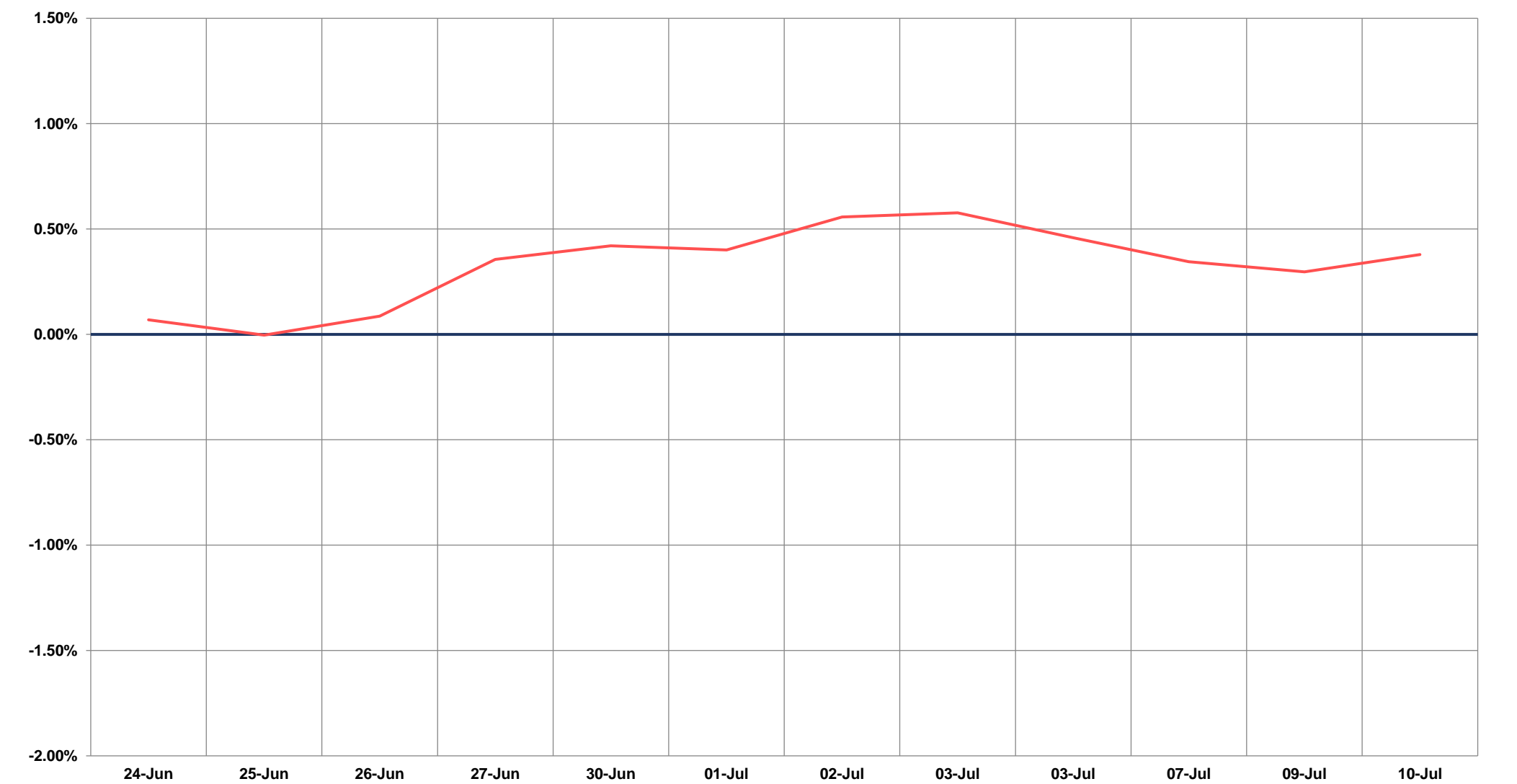
TECHNICAL VIEWS



BANK NIFTY FUTURES



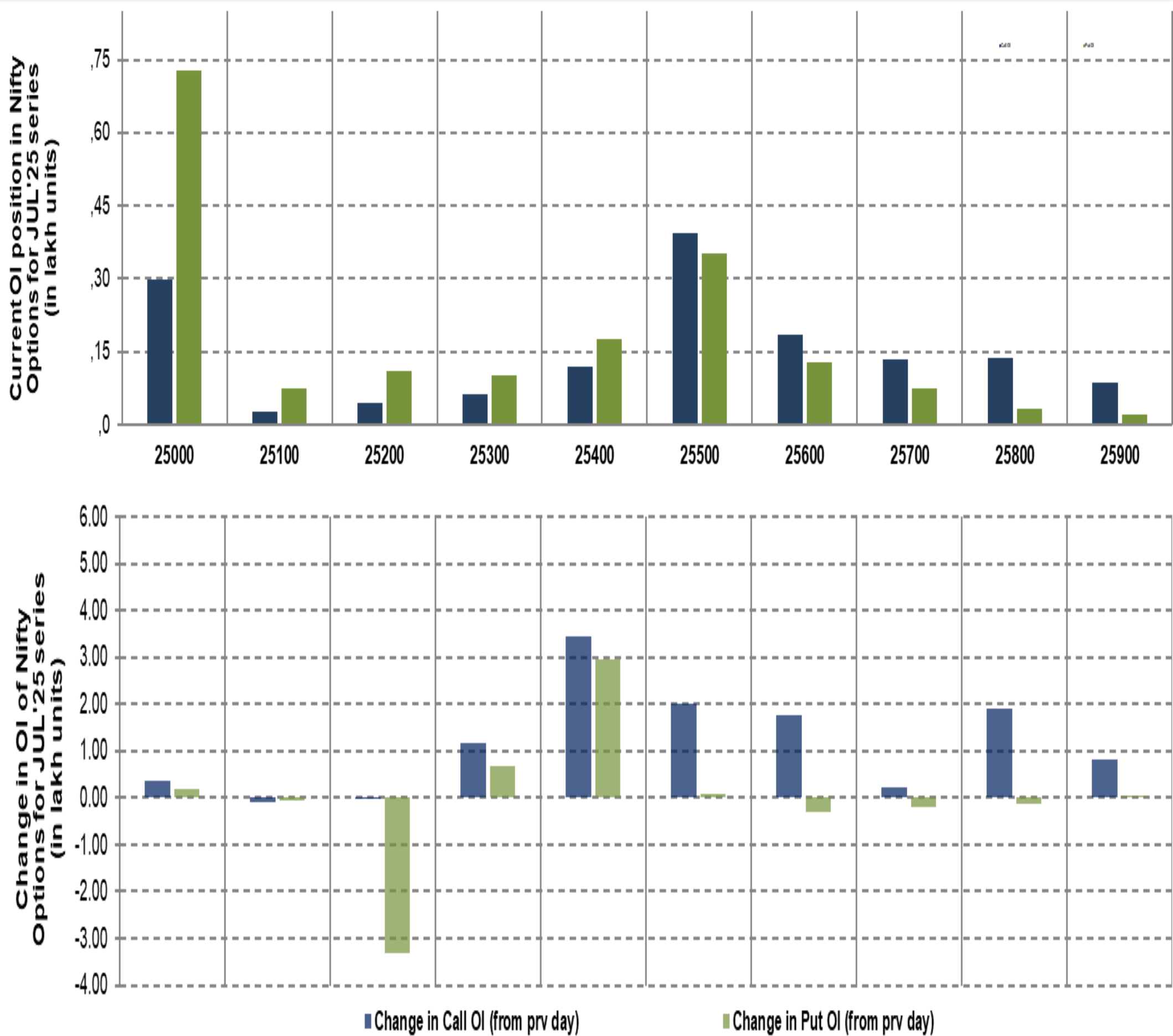
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.34 million in Open Interests is **Strike Price of 25500**
- **Most Active Nifty Put** with a subtraction of -0.33 millions in Open Interests is **Strike Price of 25200**
- **Maximum Open Interest an outstanding** was 3.94 millions for Calls at **Strike Price of 25500**
- **Maximum Open Interest an outstanding** was 7.27 millions for puts at **Strike Price of 25000**

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