



MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

July 11, 2025



Indian equity benchmarks ended near day's low points on Friday, with both the Nifty and Sensex closing with significant losses weighed down by heavy selling in IT and TECK stocks following lower-than-expected Q1 earnings from Tata Consultancy Services (TCS). Markets made gap-down opening and remained under pressure throughout the session, amid uncertainty surrounding US President Donald Trump's trade policies, as he continues to threaten elevated tariffs across various sectors and countries.

Some of the important factors in today's trade:

Private asset reconstruction companies' AUM to decline by up to 6% in FY26: Traders took a note of domestic ratings agency Crisil's statement that private asset reconstruction companies' assets under management (AUM), measured in terms of security receipts, is set to decline by up to 6 per cent in FY26 to Rs 1.05 lakh crore as redemptions are outpacing acquisitions.

India needs to increase exports to become world's third-largest economic power: Traders took note of Minister of State for Ports, Shipping and Waterways Shantanu Thakur has said that the country will have to increase its exports to become the world's third-largest economic power, and the shipping and waterways sector will play a vital role in enhancing exports.

Foreign fund inflow: Traders overlooked exchange data showed Foreign Institutional Investors (FIIs) bought equities worth Rs 221.06 crore on Thursday.

Global front: European markets were trading in red after U.S. President Donald Trump announced a 35 percent tariff on Canadian imports, starting August 1. Asian markets ended mostly in green even as Malaysia's industrial output growth moderated for the second straight month in May. Industrial production rose 0.3 percent year-over-year in May, much slower than the 2.7 percent increase in the previous month.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	82500.47	-689.81	-0.83
NIFTY	25149.85	-205.40	-0.81
MIDCAP	46291.20	-301.94	-0.65
SMLCAP	54484.76	-383.93	-0.70
BSEFMC	20571.44	91.18	0.45
HEALTHCARE	44329.97	73.87	0.17
AUTO	52561.78	-921.42	-1.72
POWER	6890.22	-29.81	-0.43
REALTY	7482.10	-89.16	-1.18
BSE IT	37028.43	-620.81	-1.65
BANKEX	63599.03	-159.90	-0.25
OIL GAS	27802.96	-359.95	-1.28
METAL	31217.97	-107.90	-0.34
INDIA VIX	11.81	0.14	1.24

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1029	1891	92
BSE	1503	2516	146

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	6232	6454	(3)
NSE CASH	97901	86650	13
NSE F&O	140286	1138303	(88)

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	22.64	3.58	1.30
SENSEX	23.62	4.39	1.17

KEY NUMBERS TRACKER



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

FII-DII*	Buy	Sell	Net
DII	15373	11890	3483
FII	11737	16892	(5156)

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)

FII	Buy	Sell	Net
Ind. Futures	2446.48	5984.24	(3538)
Ind. Options	626533.80	629776.15	(3242)
Stk. Futures	17672.27	19337.37	(1665)
Stk. Options	20689.09	19945.25	744

PUT-CALL RATIO

Index	Current	Previous
NIFTY	0.55	0.62
BANK NIFTY	0.83	0.86

DOLLAR INDEX

Dollar Index	Current	Previous	% Change
DXY	97.83	97.65	0.18

10-YEARS G-SEC YIELD

Country	Current	Previous	% Change
INDIA	6.304	6.318	-0.22
USA	4.420	4.362	1.45

KEY COMMODITIES TRACKER (in \$)

Commodity	Current	Change Points	% Change
Gold	3352.92	29.09	0.88
Silver	38.38	1.29	3.44
Crude-Oil	68.40	1.55	2.33
Brent-Crude	70.30	1.48	2.15

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES				
Expiry		Close	Change Points	% Change
29 JULY-25	USD-INR	85.84	0.08	0.09
29 JULY-25	EUR-INR	100.45	-0.15	-0.15
29 JULY-25	GBP-INR	116.23	-0.41	-0.35
29 JULY-25	JPY- INR	59.00	0.00	0.00

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS						
Index	Close	S2	S1	Pivot	R1	R2
NIFTY	25150	25007	25078	25200	25272	25394
SENSEX	82500	82063	82282	82661	82880	83260
NIFTY FUTURES	25223	25092	25158	25271	25337	25450
BANK NIFTY	56755	56335	56545	56818	57028	57301
CNX IT	37693	37315	37504	37747	37937	38180
CNX MIDCAP	58642	58050	58346	58789	59086	59529
CNX SMALLCAP	12	11	12	12	12	12
INDIA VIX	18763.45	18581.05	18672.25	18821.80	18913.00	19062.55

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

SECURITIES BAN IN F&O TRADES FOR 11-07-2025
HINDCOPPER, RBLBANK ,GLENMARK

TECHNICAL VIEWS



NIFTY

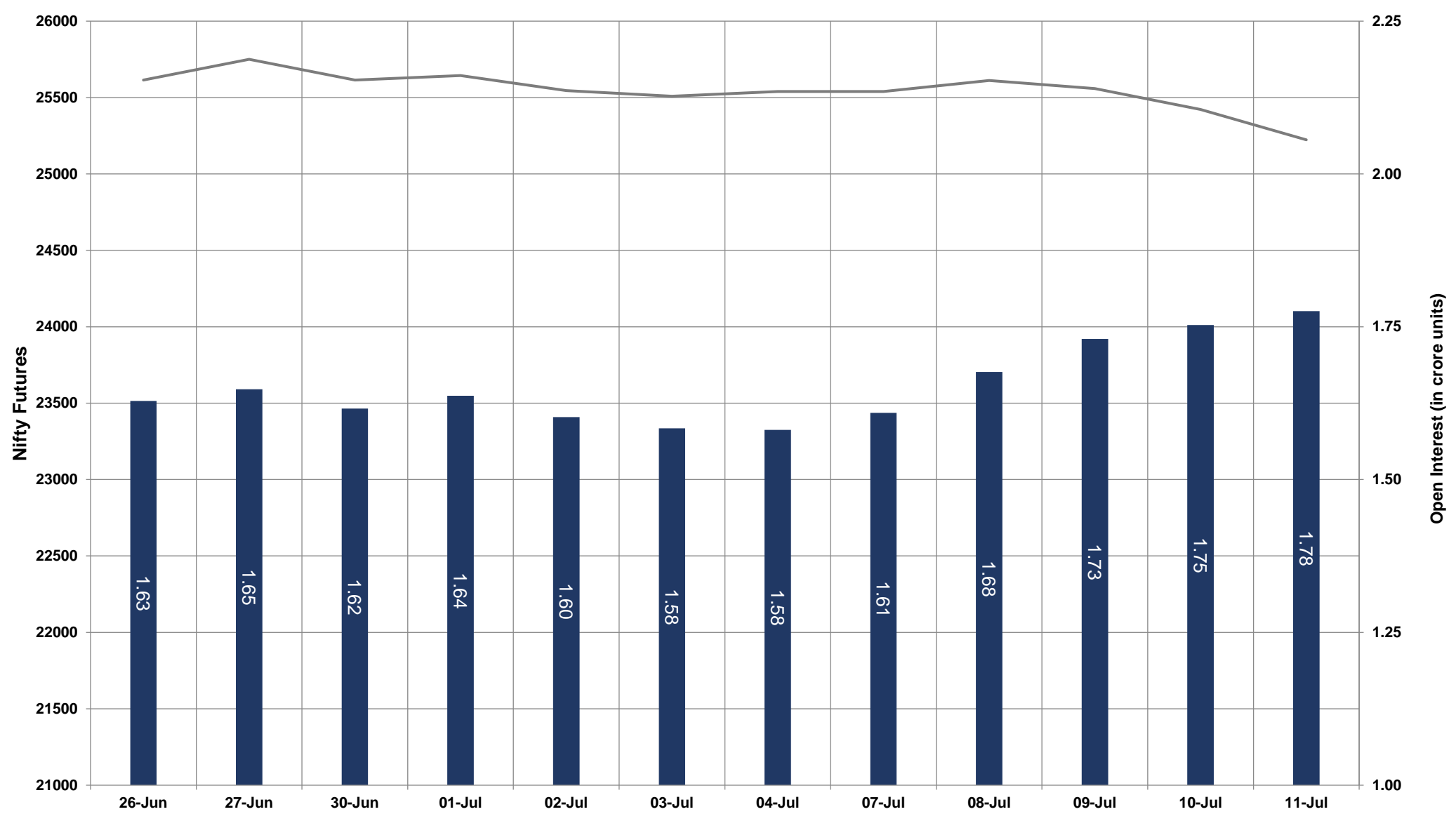


- Nifty Cash = **25149.85 (-0.81%)**
- Resistance levels = **25300** and **25400**
- Support levels = **25050** and **24980**

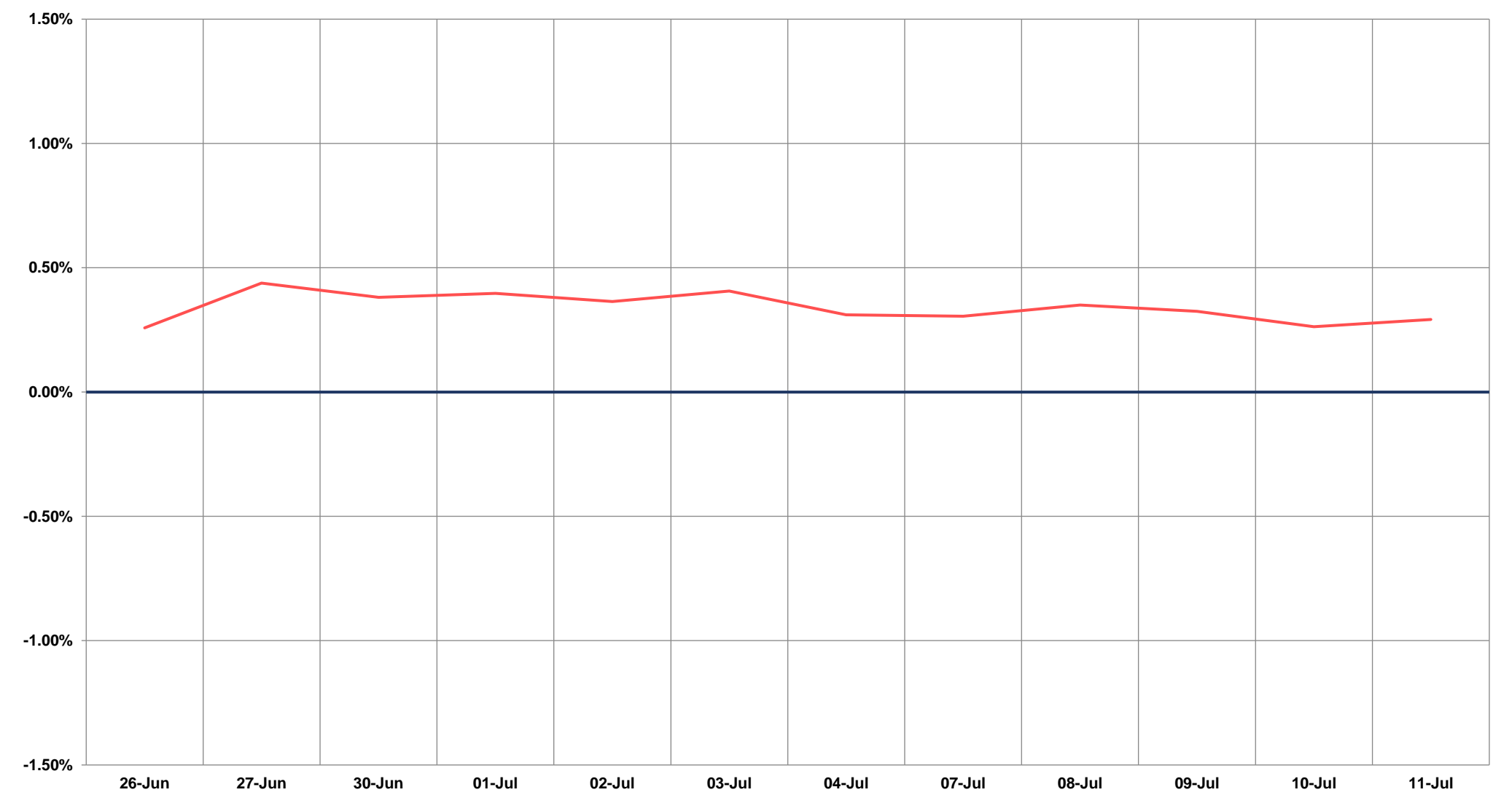
TECHNICAL VIEWS



NIFTY FUTURES



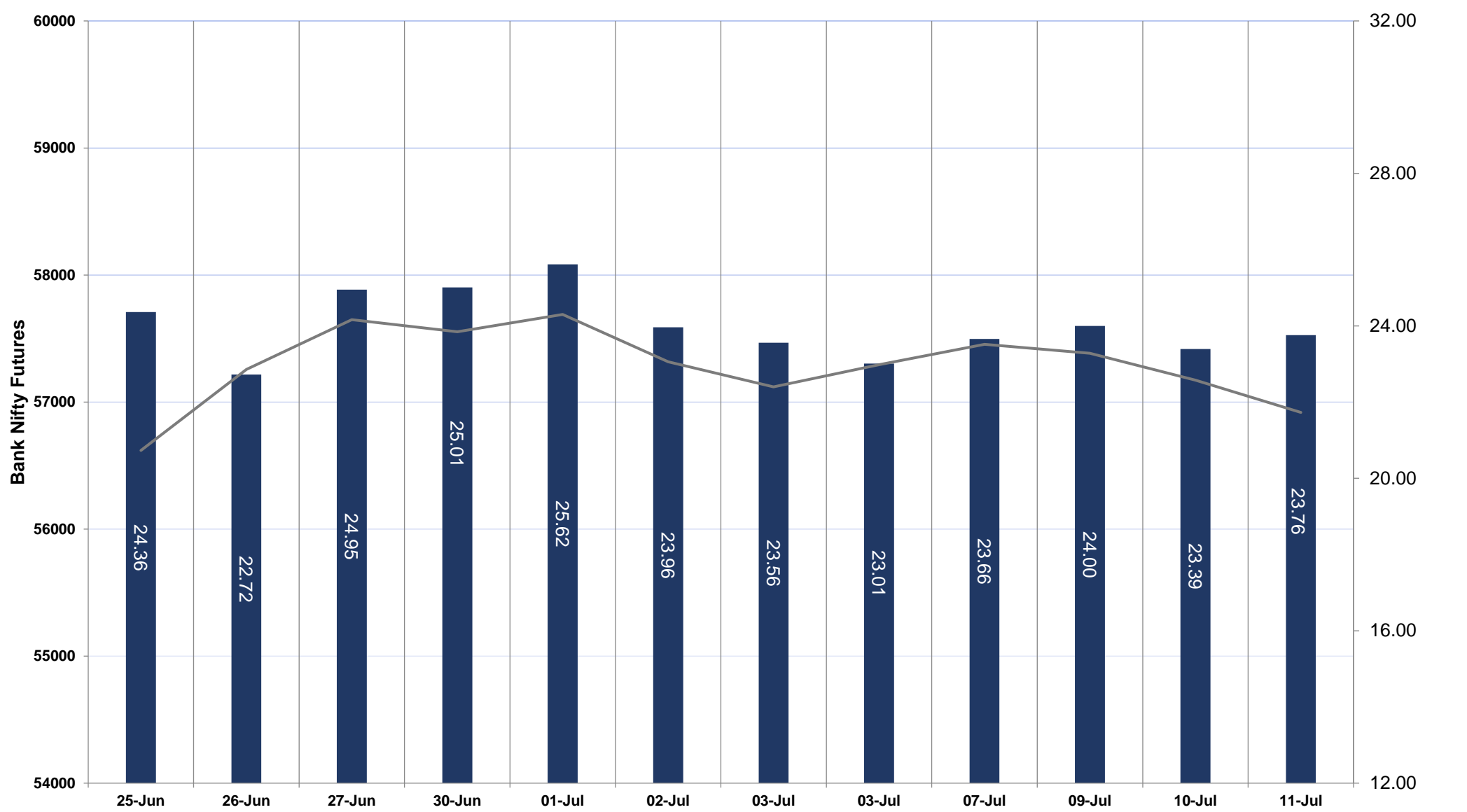
SPREAD: FUTURE & SPOT



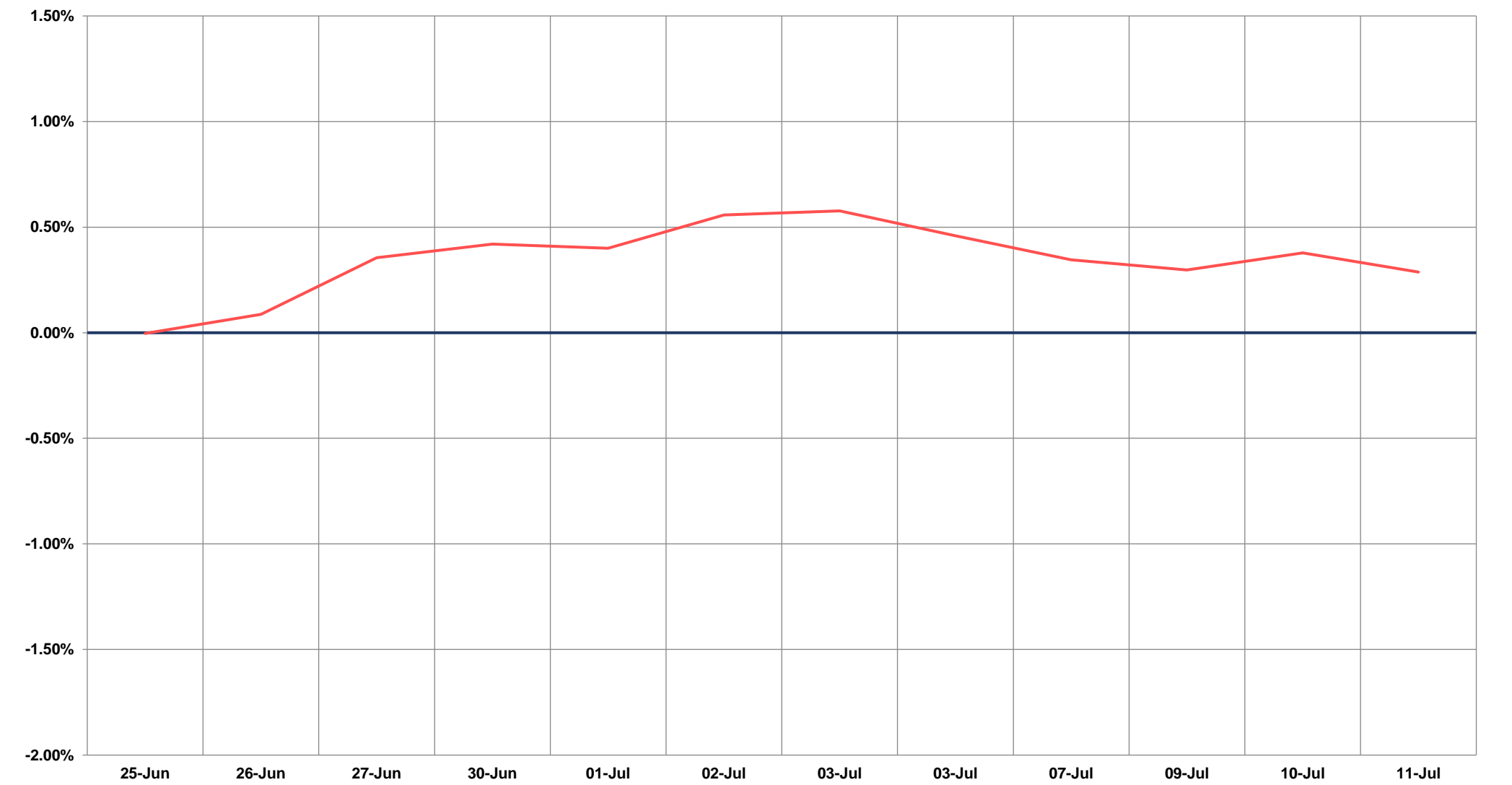
TECHNICAL VIEWS



BANK NIFTY FUTURES



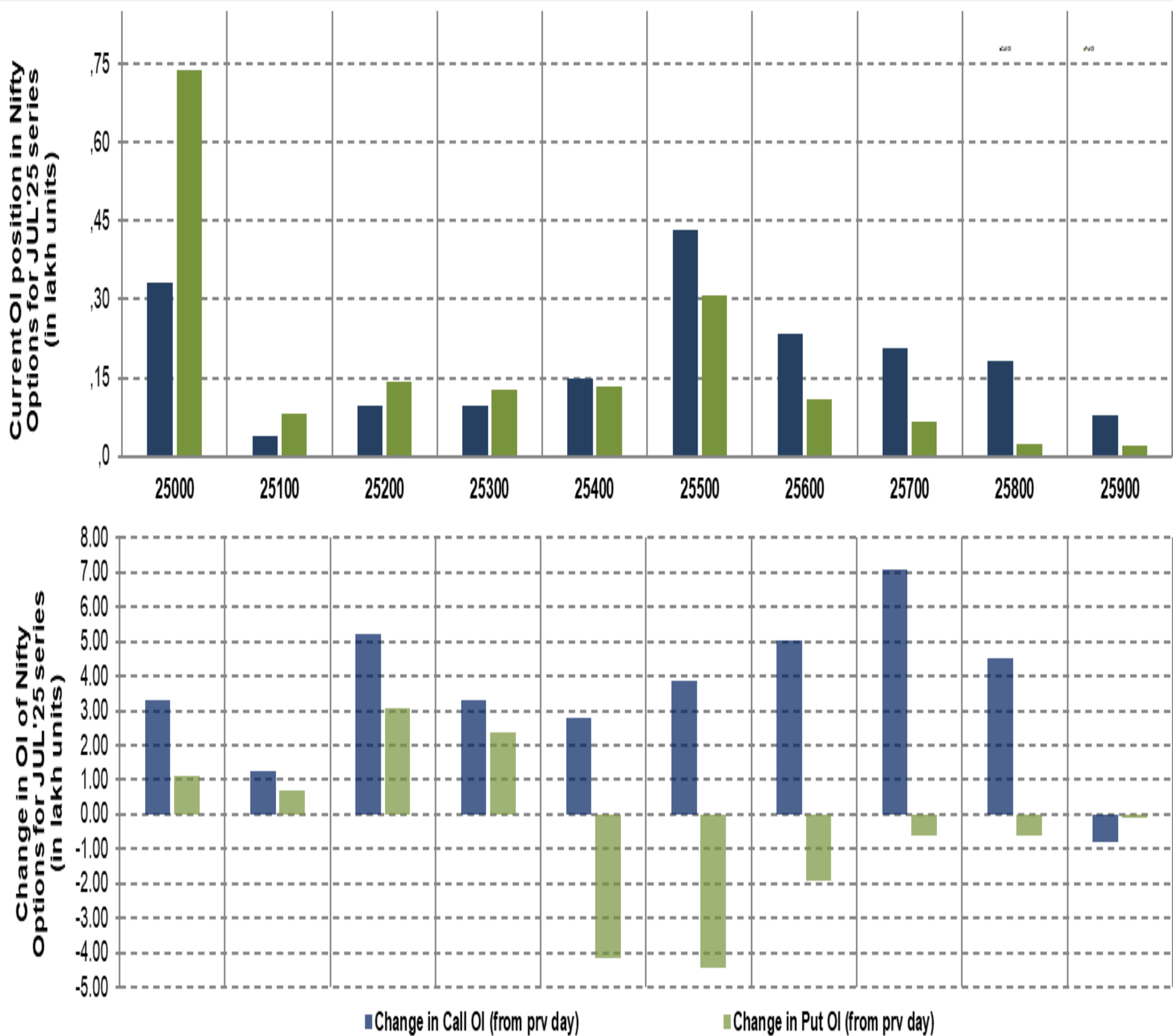
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.52 million in Open Interests is **Strike Price of 25200**
- **Most Active Nifty Put** with a subtraction of -0.44 millions in Open Interests is **Strike Price of 25500**
- **Maximum Open Interest an outstanding** was 4.33 millions for Calls at **Strike Price of 25500**
- **Maximum Open Interest an outstanding** was 7.38 millions for puts at **Strike Price of 25000**

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