



# MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

July 14, 2025



Indian equity benchmarks ended lower on Monday weighed down by broad-based selling in IT and TECK sectors, as well as persistent foreign fund outflows. According to exchange data, Foreign Institutional Investors (FIIs) offloaded equities worth Rs 5,104.22 crore on Friday. After making a cautious start, soon indices slipped into negative territory and remained under pressure throughout the session, amid lingering uncertainty over U.S. President Donald Trump's tariffs and India-U.S. bilateral trade deal.

Some of the important factors in today's trade:

Forex reserves drop by \$3 billion to \$699.73 billion: Traders were concerted as the RBI said that India's forex reserves dropped by \$3.04 billion to \$699.73 billion in the week ended July 4, 2025.

Net direct tax mop-up dips 1.34% to Rs 5.63 lakh crore on higher refunds: Some concern also came as the government data showed that net direct tax collection fell 1.34 per cent to about Rs 5.63 lakh crore till July 10 of the current financial year, mainly on account on higher refunds.

India's WPI inflation turns negative in June: Traders remained cautious after inflation based on wholesale price index (WPI) in India dropped to (-) 0.13% in the month of June, from 0.39% in May 2025, marking the first negative reading since the beginning of the year.

Global front: European markets were trading mostly in red after U.S. President Donald Trump threatened to impose a 30 percent tariff on European Union goods, raising concerns over a prolonged and deeper economic slowdown. Asian markets ended mostly in green as China's exports growth exceeded expectations and imports rebounded in June.

# MARKET SELFIE



## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	82253.46	-247.01	-0.30
NIFTY	25082.30	-67.55	-0.27
MIDCAP	46600.13	308.93	0.67
SMLCAP	54796.82	312.06	0.57
BSEFMC	20613.54	42.10	0.20
HEALTHCARE	44841.24	511.27	1.15
AUTO	52721.90	160.12	0.30
POWER	6906.58	16.36	0.24
REALTY	7585.51	103.41	1.38
BSE IT	36662.58	-365.85	-0.99
BANKEX	63596.91	-2.12	-0.01
OIL GAS	27853.26	50.30	0.18
METAL	31304.36	86.39	0.28
INDIA VIX	11.98	0.16	1.35

## ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1461	1479	103
BSE	1915	1969	208

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	8162	6232	31
NSE CASH	99598	97901	2
NSE F&O	132608	140286	(5)

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	22.57	3.57	1.29
SENSEX	23.55	4.38	1.16

# KEY NUMBERS TRACKER



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

FII-DII*	Buy	Sell	Net
DII	14166	12345	1821
FII	15180	16810	(1629)

Note: FPI & DII Figures are provisional

## FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)

FII	Buy	Sell	Net
Ind. Futures	2866.55	6144.39	(3278)
Ind. Options	671908.15	681871.93	(9964)
Stk. Futures	18524.39	18786.76	(262)
Stk. Options	20010.36	19742.58	268

## PUT-CALL RATIO

Index	Current	Previous
NIFTY	0.72	0.55
BANK NIFTY	0.86	0.83

## DOLLAR INDEX

Dollar Index	Current	Previous	% Change
DXY	97.96	97.85	0.11

## 10-YEARS G-SEC YIELD

Country	Current	Previous	% Change
INDIA	6.311	6.304	0.11
USA	4.443	4.420	0.41

## KEY COMMODITIES TRACKER (in \$)

Commodity	Current	Change Points	% Change
Gold	3344.45	-9.86	-0.28
Silver	38.26	-0.12	-0.31
Crude-Oil	67.30	-1.375	-1.99
Brent-Crude	69.46	-1.16	-1.66

# CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES				
Expiry		Close	Change Points	% Change
29 JULY-25	USD-INR	86.02	0.18	0.20
29 JULY-25	EUR-INR	100.65	0.22	0.22
29 JULY-25	GBP-INR	116.10	-0.19	-0.16
29 JULY-25	JPY- INR	58.75	-0.25	-0.42

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS						
Index	Close	S2	S1	Pivot	R1	R2
NIFTY	25082	24929	25006	25078	25155	25228
SENSEX	82253	81740	81997	82267	82524	82795
NIFTY FUTURES	25168	25001	25084	25160	25243	25318
BANK NIFTY	56765	56450	56608	56752	56910	57054
CNX IT	37274	36670	36972	37318	37620	37966
CNX MIDCAP	59053	58275	58664	58882	59270	59488
CNX SMALLCAP	18955	18612	18784	18874	19046	19136
INDIA VIX	11.98	11.47	11.73	12.07	12.33	12.67

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	Buy	Buy	Buy
INDIA VIX	Neutral	Sell	Neutral

SECURITIES BAN IN F&O TRADES FOR 15-07-2025
HINDCOPPER, RBLBANK ,GLENMARK



# TECHNICAL VIEWS



## NIFTY

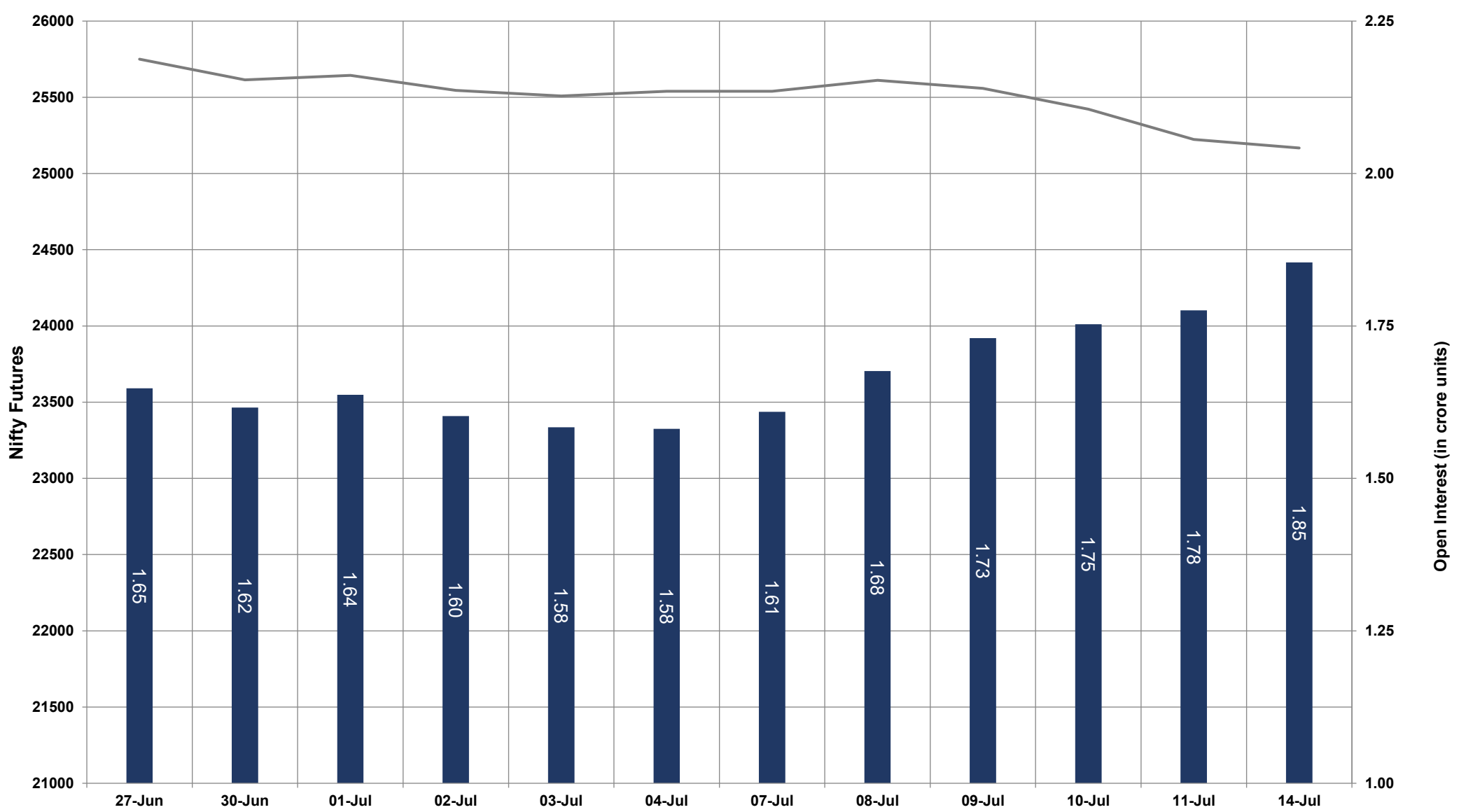


- Nifty Cash = **25082.30 (-0.27%)**
- Resistance levels = **25170** and **25300**
- Support levels = **25000** and **24850**

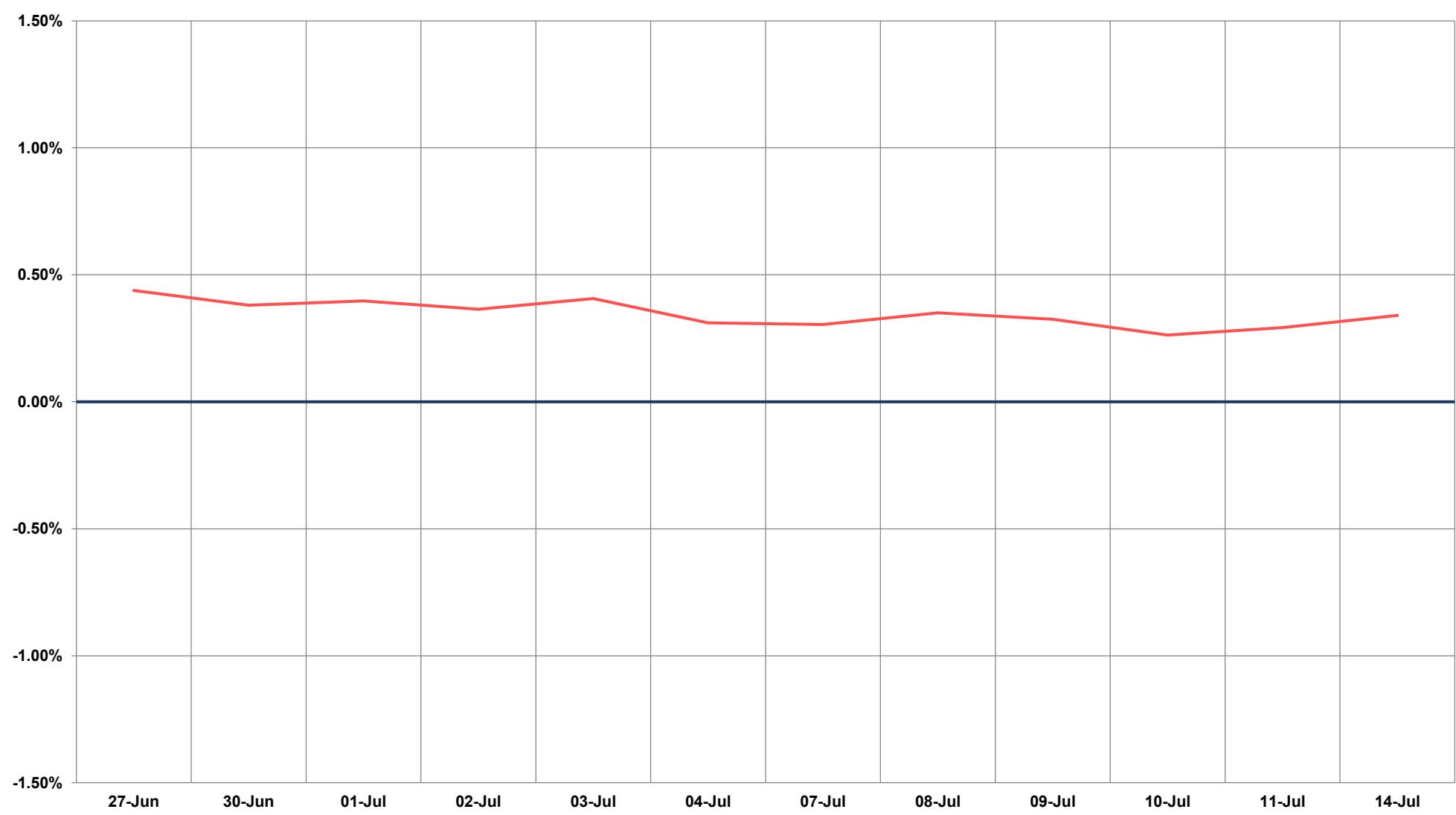
# TECHNICAL VIEWS



## NIFTY FUTURES



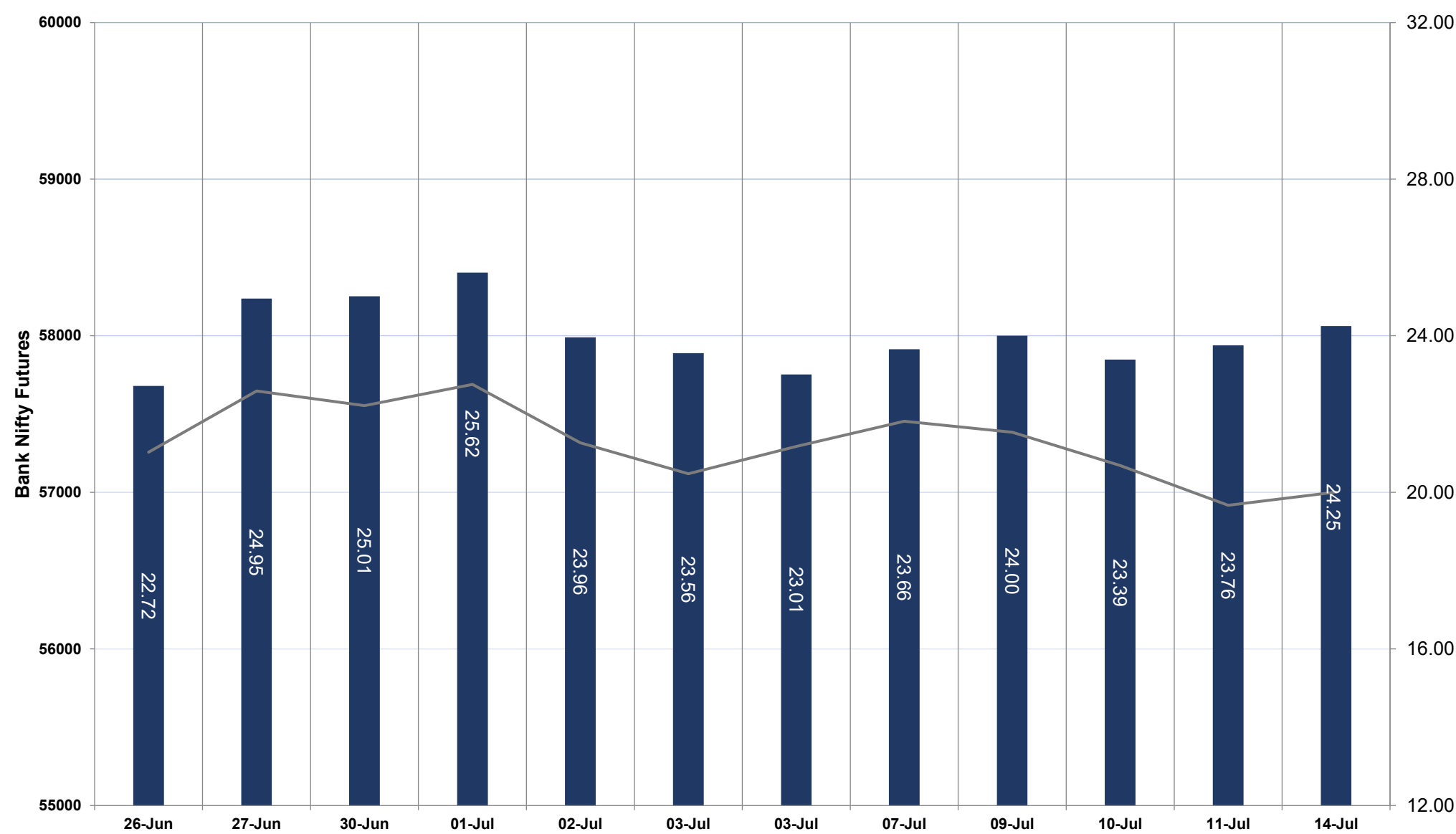
## SPREAD: FUTURE & SPOT



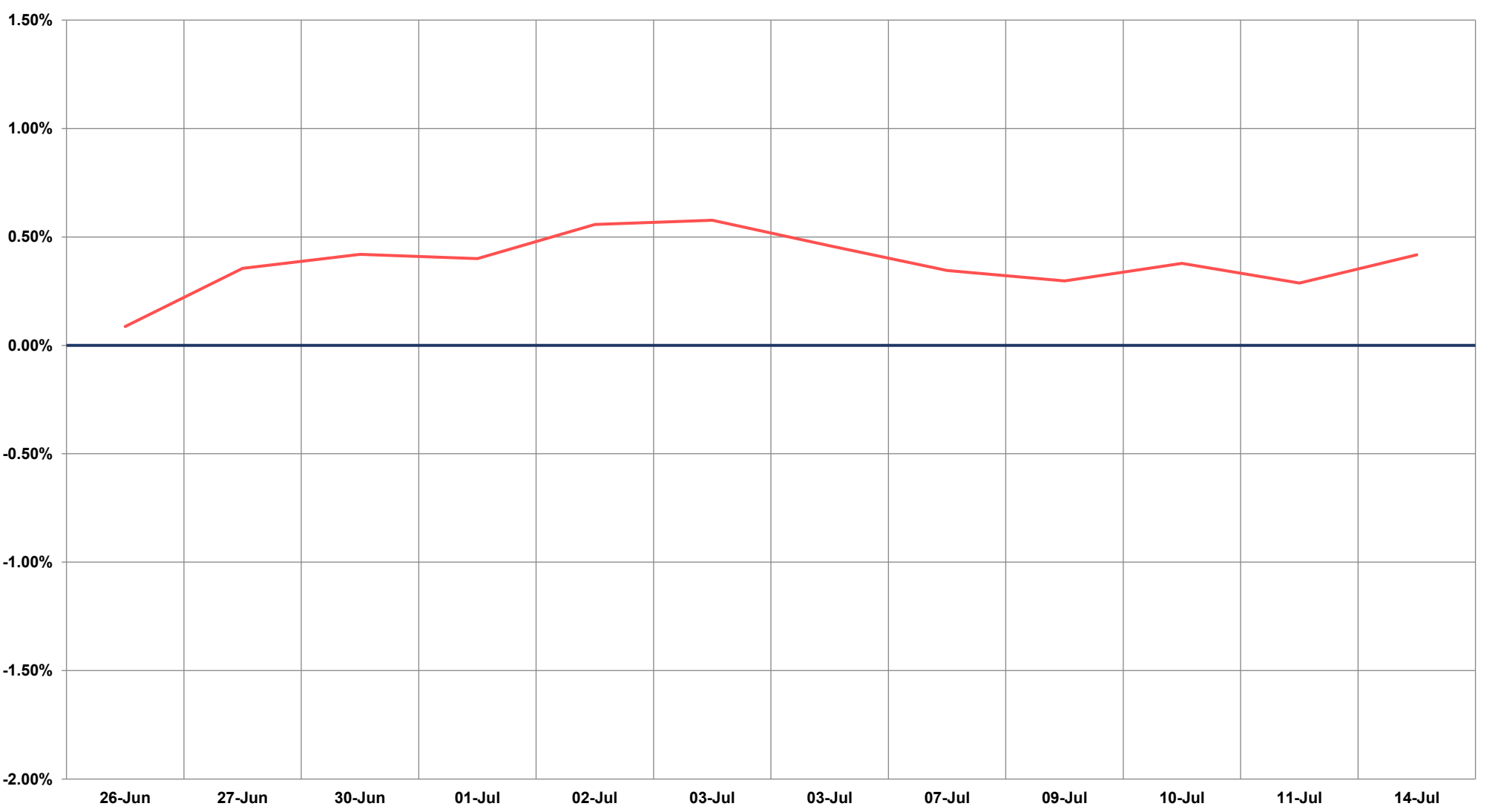
# TECHNICAL VIEWS



## BANK NIFTY FUTURES



## SPREAD: FUTURE & SPOT

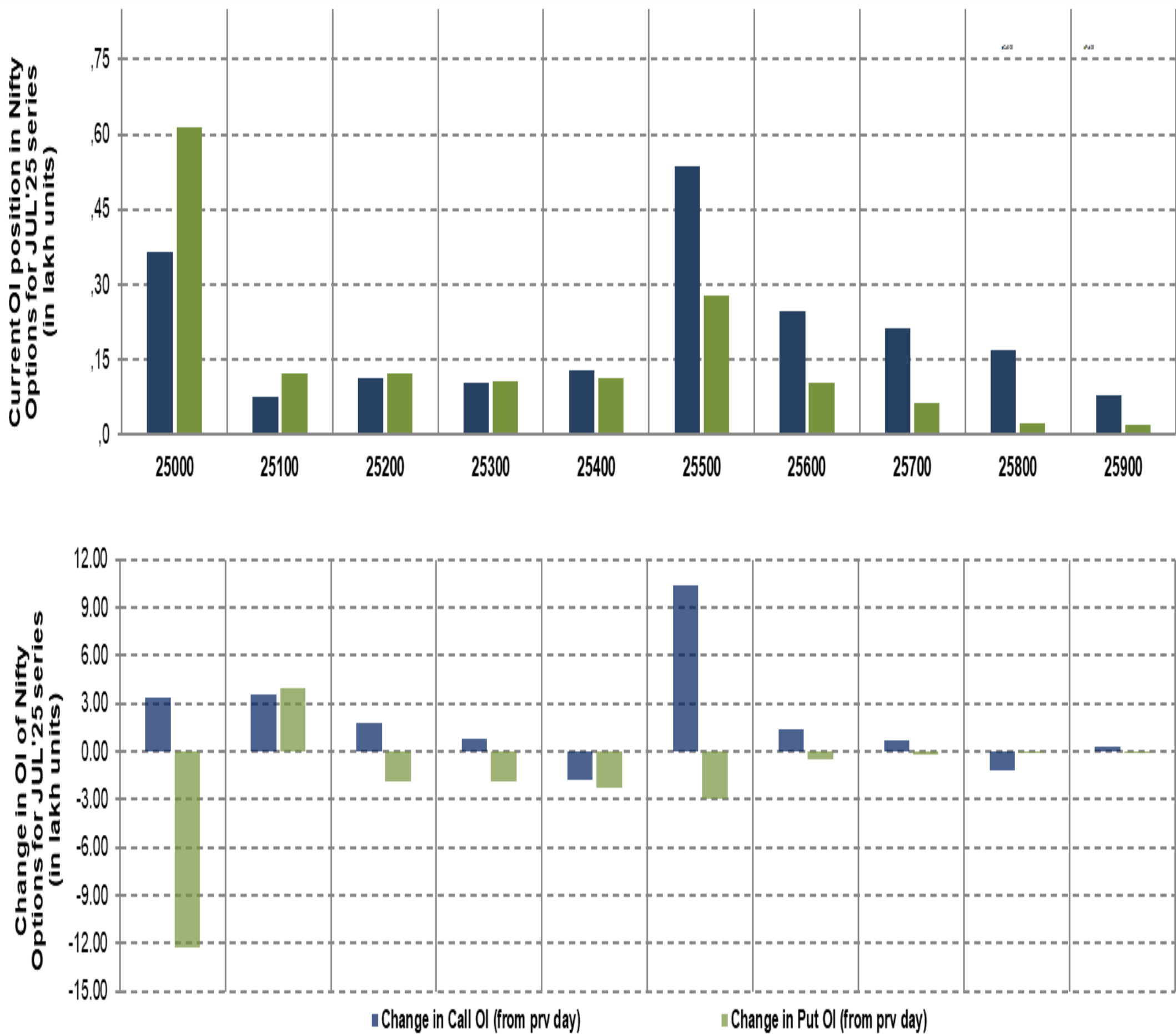




# TECHNICAL VIEWS



## NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 1.03 million in Open Interests is **Strike Price of 25500**
- **Most Active Nifty Put** with a subtraction of 1.22 millions in Open Interests is **Strike Price of 25000**
- **Maximum Open Interest an outstanding** was 5.36 millions for Calls at **Strike Price of 25500**
- **Maximum Open Interest an outstanding** was 6.15 millions for puts at **Strike Price of 25000**

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