



# MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

July 15, 2025



Indian equity benchmarks snapped their four-day losing streak on Monday tracking largely positive global cues. After making a cautious start, indices soon turned positive and remained higher throughout the day, as traders found some relief amid easing domestic retail inflation which could provide the Reserve Bank of India's monetary policy committee (MPC) room to maintain status quo in repo rate in its upcoming reviews.

Some of the important factors in today's trade:

Retail inflation eases to over 6-year low of 2.1% in June: Some support came as retail inflation slipped to a more than six-year low of 2.1 per cent in June mainly due to subdued prices of food items, including vegetables, pulses, meat, and milk.

India, US talks for proposed trade pact going on at very fast pace: Some support also came as Commerce and Industry Minister Piyush Goyal stated that the negotiations between India and the US for a proposed trade agreement are going at a fast pace.

India, New Zealand start second round of negotiations for proposed free trade agreement: Investors took some support with report that India and New Zealand have started the second round of negotiations for the proposed free trade agreement, aimed at boosting two-way commerce and investments.

Global front: European markets were trading mostly in green amid optimism that U.S President Donald Trump's bargaining tactics are unlikely to derail global trade. Asian markets ended mostly in green as China's gross domestic product expanded a seasonally adjusted 1.1 percent on quarter in the second quarter of 2025.

# MARKET SELFIE



## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	82570.91	317.45	0.39
NIFTY	25195.80	113.50	0.45
MIDCAP	46985.42	385.29	0.83
SMLCAP	55318.46	521.64	0.95
BSEFMC	20779.23	165.69	0.80
HEALTHCARE	45352.09	510.85	1.14
AUTO	53500.72	778.82	1.48
POWER	6925.00	18.42	0.27
REALTY	7643.70	58.19	0.77
BSE IT	36838.98	176.40	0.48
BANKEX	63775.26	178.35	0.28
OIL GAS	27996.60	143.34	0.51
METAL	31323.16	18.80	0.06
INDIA VIX	11.48	-0.50	-4.17

## ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1967	963	86
BSE	2504	1558	153

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	7012	8162	(14)
NSE CASH	96302	99598	(3)
NSE F&O	130513	132608	(2)

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	22.67	3.58	1.29
SENSEX	23.64	4.39	1.16

# KEY NUMBERS TRACKER



FII – DII ACTIVITY IN CASH SEGMENT (₹ in Crs)			
FII-DII*	Buy	Sell	Net
DII	13324	11846	1478
FII	11209	11105	104

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)			
FII	Buy	Sell	Net
Ind. Futures	2427.25	2580.51	(153)
Ind. Options	773217.37	768879.96	4337
Stk. Futures	18686.19	18568.36	118
Stk. Options	19791.36	19924.60	(133)

PUT-CALL RATIO		
Index	Current	Previous
NIFTY	0.88	0.72
BANK NIFTY	0.89	0.86

DOLLAR INDEX			
Dollar Index	Current	Previous	% Change
DXY	98.50	98.08	0.42

10-YEARS G-SEC YIELD			
Country	Current	Previous	% Change
INDIA	6.312	6.311	0.02
USA	4.480	4.429	1.20

KEY COMMODITIES TRACKER (in \$)			
Commodity	Current	Change Points	% Change
Gold	3322.81	-22.13	-0.67
Silver	37.64	-0.61	-1.64
Crude-Oil	66.48	-0.33	-0.49
Brent-Crude	68.78	-0.25	-0.37

# CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES				
Expiry		Close	Change Points	% Change
29 JULY-25	USD-INR	85.89	-0.13	-0.15
29 JULY-25	EUR-INR	100.39	-0.26	-0.26
29 JULY-25	GBP-INR	115.56	-0.59	-0.51
29 JULY-25	JPY- INR	58.58	-0.17	-0.29

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS						
Index	Close	S2	S1	Pivot	R1	R2
NIFTY	25196	25020	25108	25176	25265	25333
SENSEX	82571	81990	82281	82512	82802	83034
NIFTY FUTURES	25266	25087	25176	25241	25330	25395
BANK NIFTY	57007	56523	56765	56950	57192	57377
CNX IT	37425	36764	37094	37379	37710	37995
CNX MIDCAP	59613	58899	59256	59455	59811	60010
CNX SMALLCAP	19135	18944	19040	19098	19194	19252
INDIA VIX	11.48	11.01	11.25	11.63	11.87	12.25

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

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



# TECHNICAL VIEWS



## NIFTY

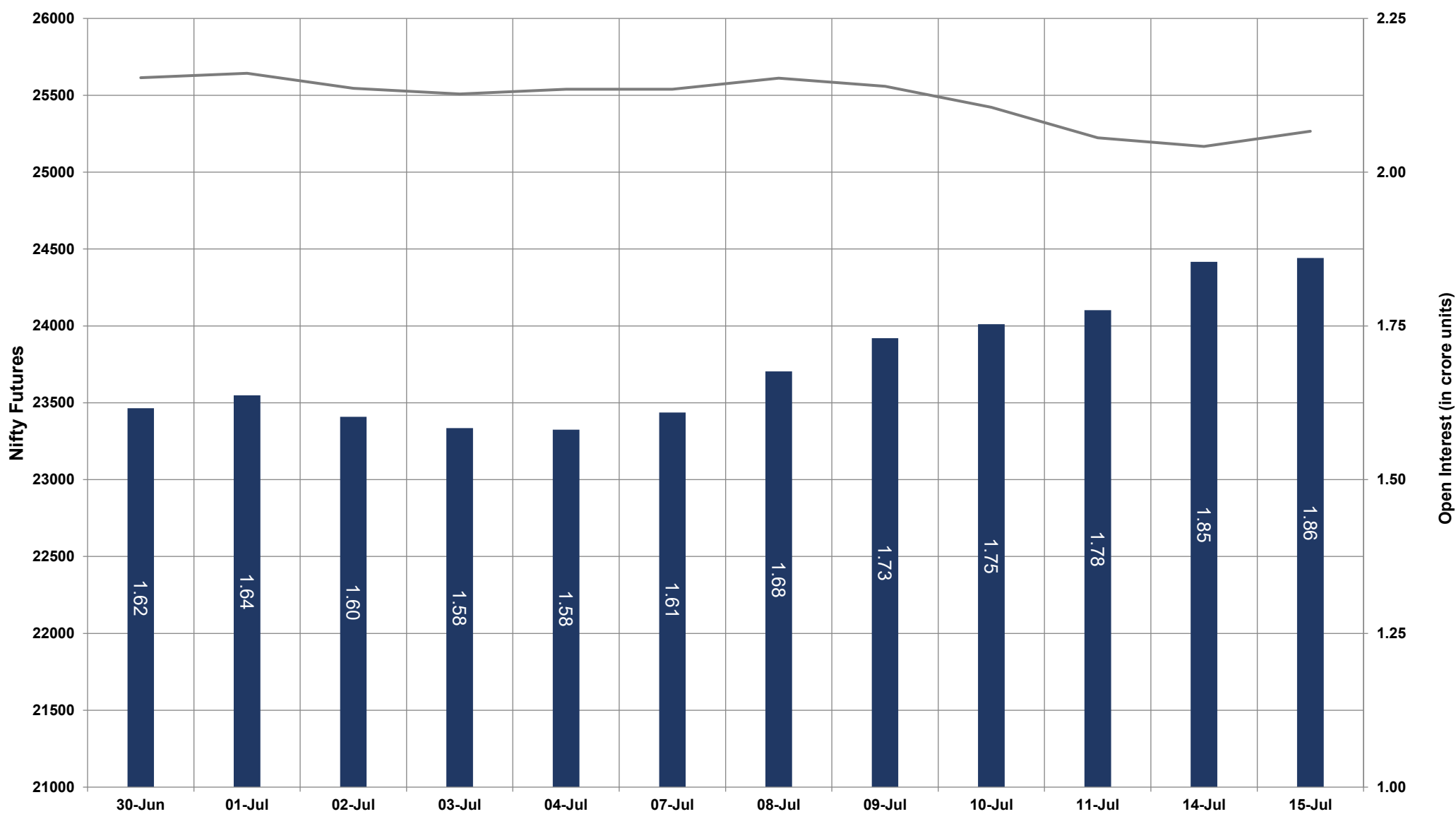


- Nifty Cash = **25195.80 (0.48%)**
- Resistance levels = **25340** and **25475**
- Support levels = **25100** and **24985**

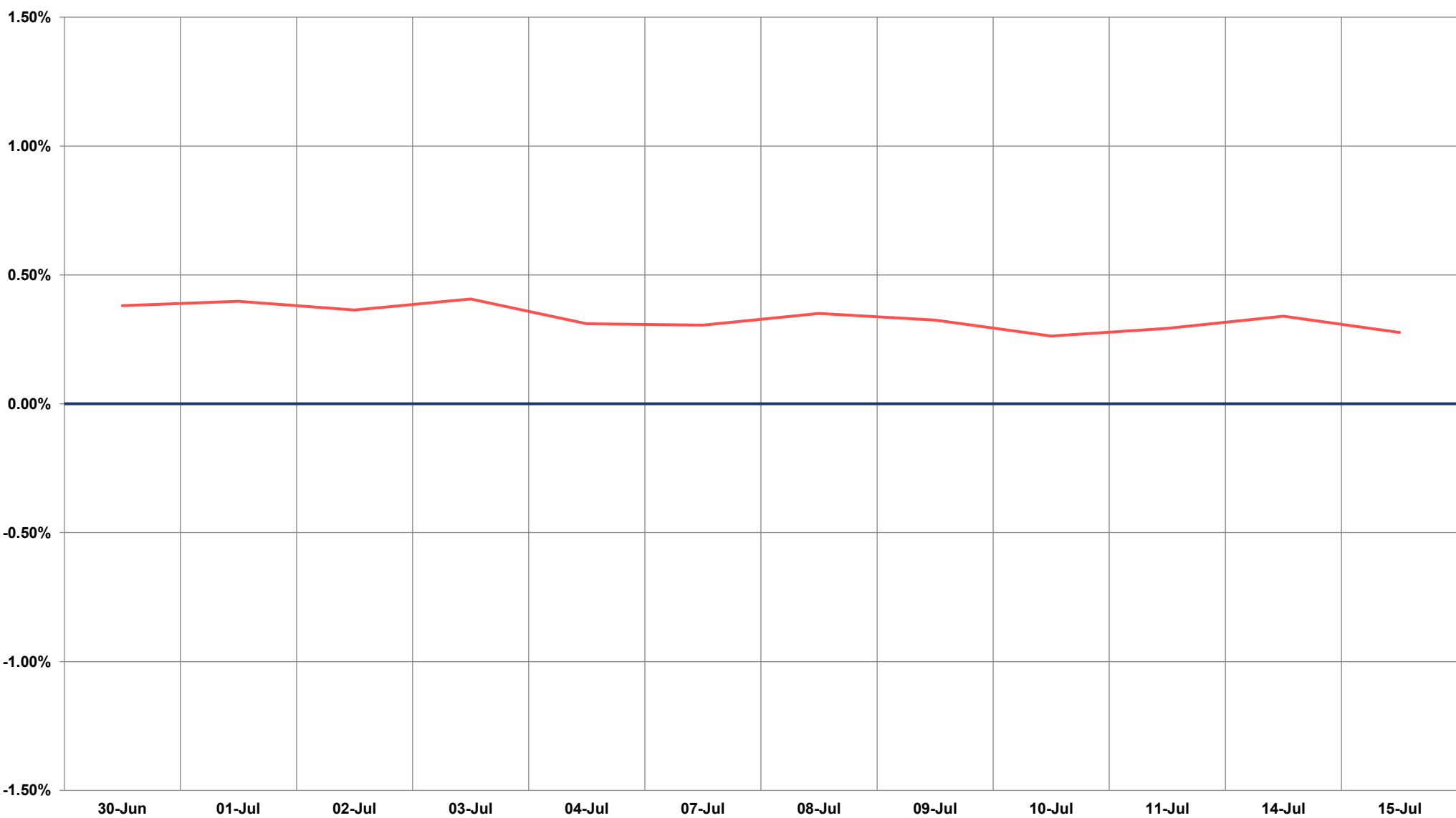
# TECHNICAL VIEWS



## NIFTY FUTURES



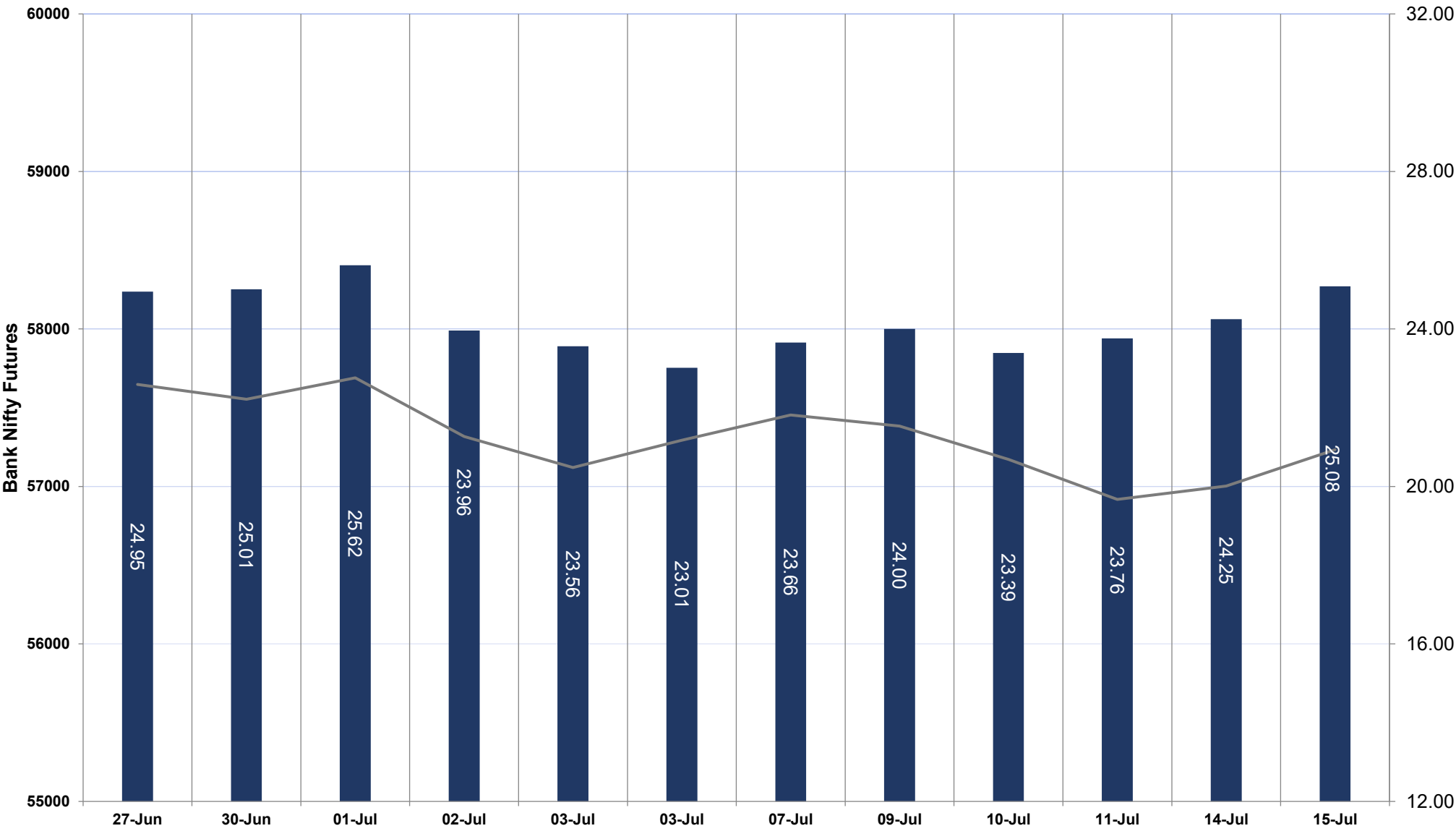
## SPREAD: FUTURE & SPOT



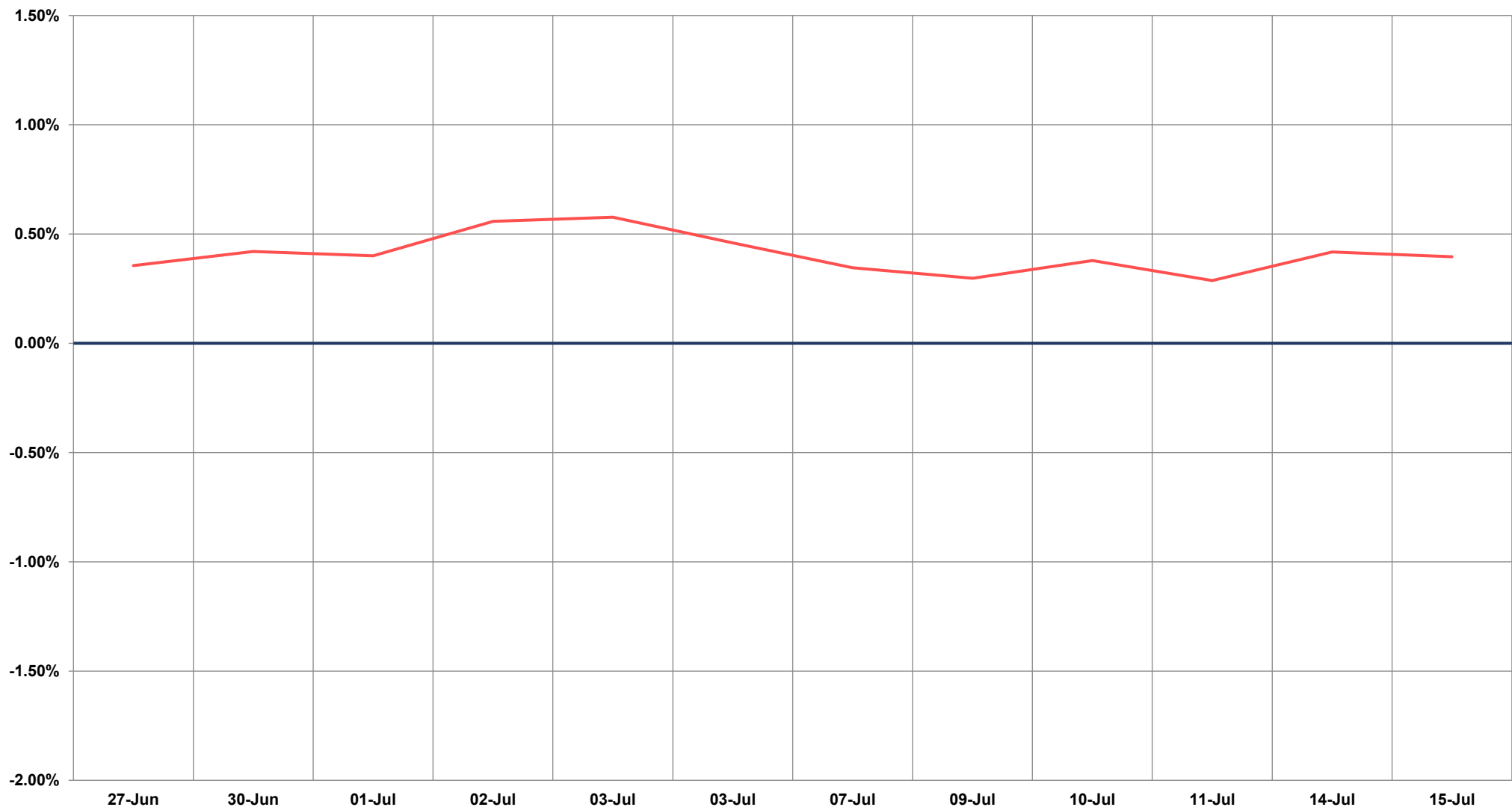
# TECHNICAL VIEWS



## BANK NIFTY FUTURES



## SPREAD: FUTURE & SPOT

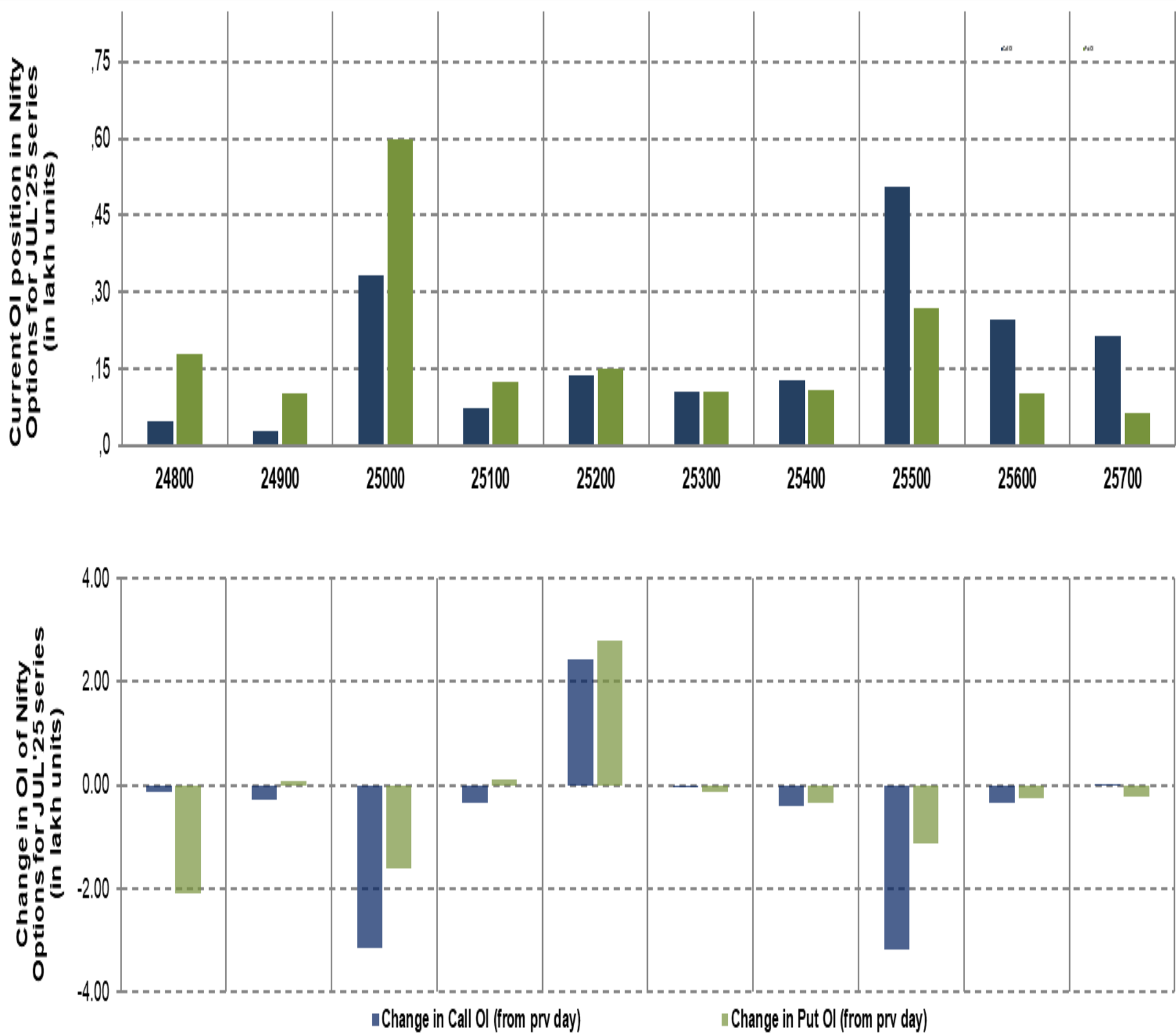




# TECHNICAL VIEWS



## NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.24 million in Open Interests is **Strike Price of 25200**
- **Most Active Nifty Put** with a addition of 0.28 millions in Open Interests is **Strike Price of 25200**
- **Maximum Open Interest an outstanding** was 5.05 millions for Calls at **Strike Price of 25500**
- **Maximum Open Interest an outstanding** was 5.99 millions for puts at **Strike Price of 25000**

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