



MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

July 17, 2025



Domestic markets magnified their losses in last leg of trade and concluded the Thursday's trading session near day's low levels amid U.S. tariff-related uncertainty. After making slightly positive start, soon indices entered into red territory as investors preferred to play safe. Besides, traders kept their close watch towards Q1 earnings. Further, markets remained under selling pressure till end of the session amid weekly F&O expiry.

Some of the important factors in today's trade:

Foreign fund outflows: Traders were worried amid fresh foreign fund outflows. Foreign Institutional Investors (FIIs) offloaded equities worth Rs 1,858.15 crore on Wednesday, according to exchange data.

India's outward FDI jumps 74% in June: Traders overlooked Reserve Bank of India's (RBI) latest report stating that outward foreign direct investment (OFDI) by domestic firms has seen a jump of 73.77% to \$5,030.48 million in June 2025 as against \$2,894.90 million in June 2024. In May 2025, it stood at \$2,702.92 million.

India-US trade talks: US President Donald Trump said that America has another trade deal coming up, possibly with India. Trump's comments come at a time when India's commerce officials are in Washington DC for another round of trade deal talks.

Global front: European markets were trading higher despite Euro area inflation rose slightly to the European Central Bank's 2 percent target in June, as initially estimated. Annual inflation moved up to 2.0 percent in June from 1.9 percent in May. Asian equity markets ended mostly in green after U.S. President Donald Trump denied plans to fire Federal Reserve Chairman Jerome Powell.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	82259.24	-375.24	-0.45
NIFTY	25111.45	-100.60	-0.40
MIDCAP	47066.00	32.98	0.07
SMLCAP	55639.62	164.22	0.30
BSEFMC	20935.79	66.41	0.32
HEALTHCARE	45409.84	126.07	0.28
AUTO	53737.68	41.41	0.08
POWER	6937.24	5.17	0.07
REALTY	7775.46	93.84	1.22
BSE IT	36589.04	-492.07	-1.33
BANKEX	63586.81	-327.67	-0.51
OIL GAS	28000.85	-64.94	-0.23
METAL	31324.70	191.50	0.62
INDIA VIX	11.24	0.002	0.02

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1432	1502	89
BSE	1957	2085	157

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	7040	6653	6
NSE CASH	95272	94738	1
NSE F&O	145938	138994	5

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	22.59	3.57	1.29
SENSEX	23.55	4.38	1.17

KEY NUMBERS TRACKER



FII – DII ACTIVITY IN CASH SEGMENT (₹ in Crs)			
FII-DII*	Buy	Sell	Net
DII	12925	10208	2718
FII	11042	14712	(3671)

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)			
FII	Buy	Sell	Net
Ind. Futures	1917.86	3907.09	(1989)
Ind. Options	1658684.39	1644699.10	13985
Stk. Futures	19138.30	20626.78	(1488)
Stk. Options	21026.71	21283.81	(257)

PUT-CALL RATIO		
Index	Current	Previous
NIFTY	0.77	0.91
BANK NIFTY	0.85	0.92

DOLLAR INDEX			
Dollar Index	Current	Previous	% Change
DXY	98.70	98.39	0.31

10-YEARS G-SEC YIELD			
Country	Current	Previous	% Change
INDIA	6.303	6.313	-0.16
USA	4.438	4.454	-0.40

KEY COMMODITIES TRACKER (in \$)			
Commodity	Current	Change Points	% Change
Gold	3319.78	-26.95	-0.82
Silver	37.75	-0.12	-0.32
Crude-Oil	66.56	-0.06	-0.11
Brent-Crude	68.56	-0.13	-0.19

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES				
Expiry		Close	Change Points	% Change
29 JULY-25	USD-INR	86.16	0.16	0.19
29 JULY-25	EUR-INR	99.88	-0.10	-0.10
29 JULY-25	GBP-INR	115.55	0.18	0.16
29 JULY-25	JPY- INR	58.20	0.17	0.29

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS						
Index	Close	S2	S1	Pivot	R1	R2
NIFTY	25111	25013	25062	25150	25200	25288
SENSEX	82259	81874	82067	82412	82604	82950
NIFTY FUTURES	25175	25095	25135	25205	25245	25315
BANK NIFTY	56829	56475	56652	56957	57134	57440
CNX IT	37139	36683	36911	37289	37517	37894
CNX MIDCAP	59519	59250	59385	59588	59722	59925
CNX SMALLCAP	19117	19015	19066	19145	19197	19276
INDIA VIX	11.24	10.36	10.80	11.17	11.61	11.98

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 18-07-2025
HINDCOPPER, RBLBANK ,ANGELONE

TECHNICAL VIEWS



NIFTY

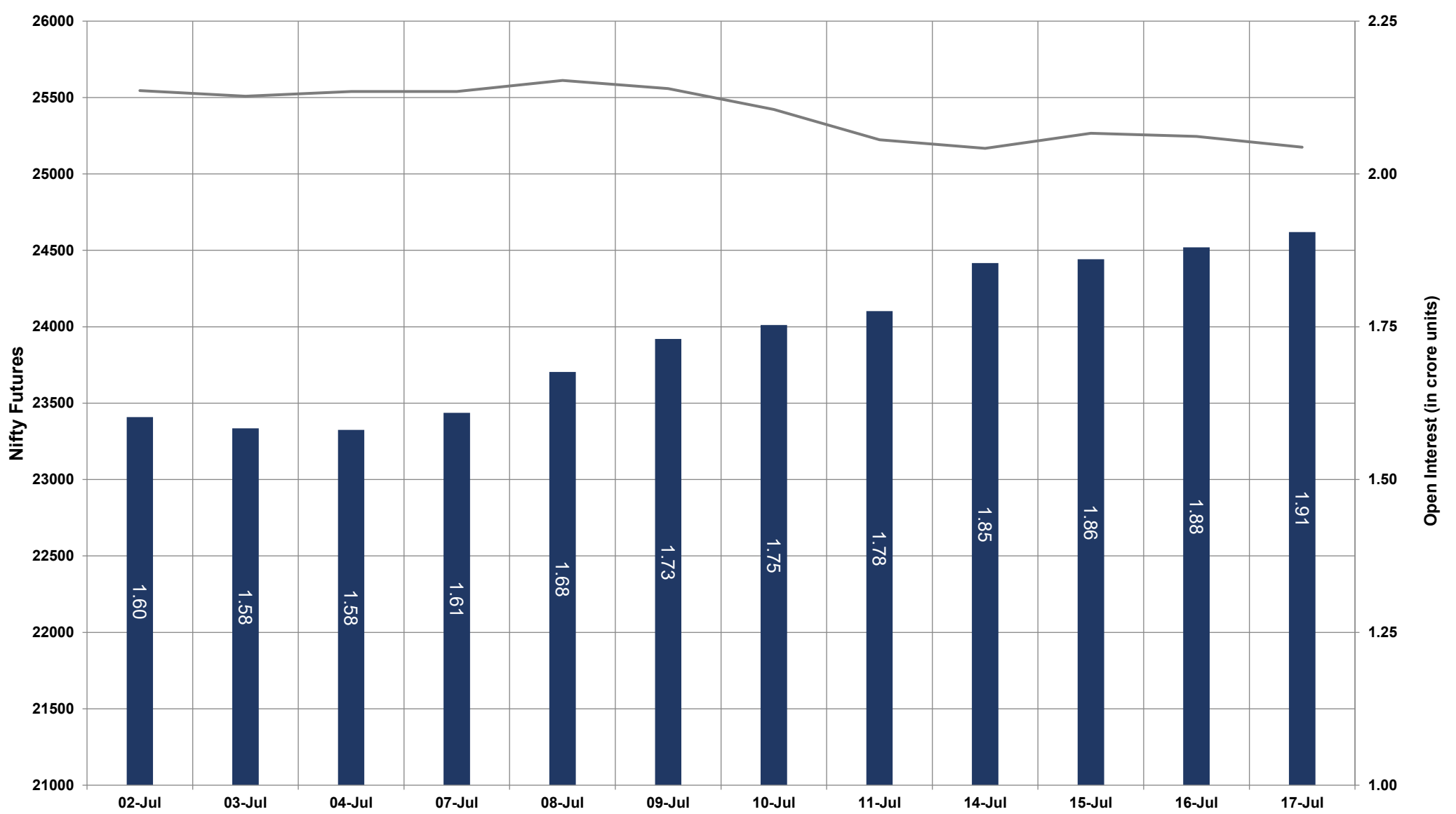


- Nifty Cash = **25111.45 (-0.40%)**
- Resistance levels = **25220** and **25310**
- Support levels = **25000** and **24850**

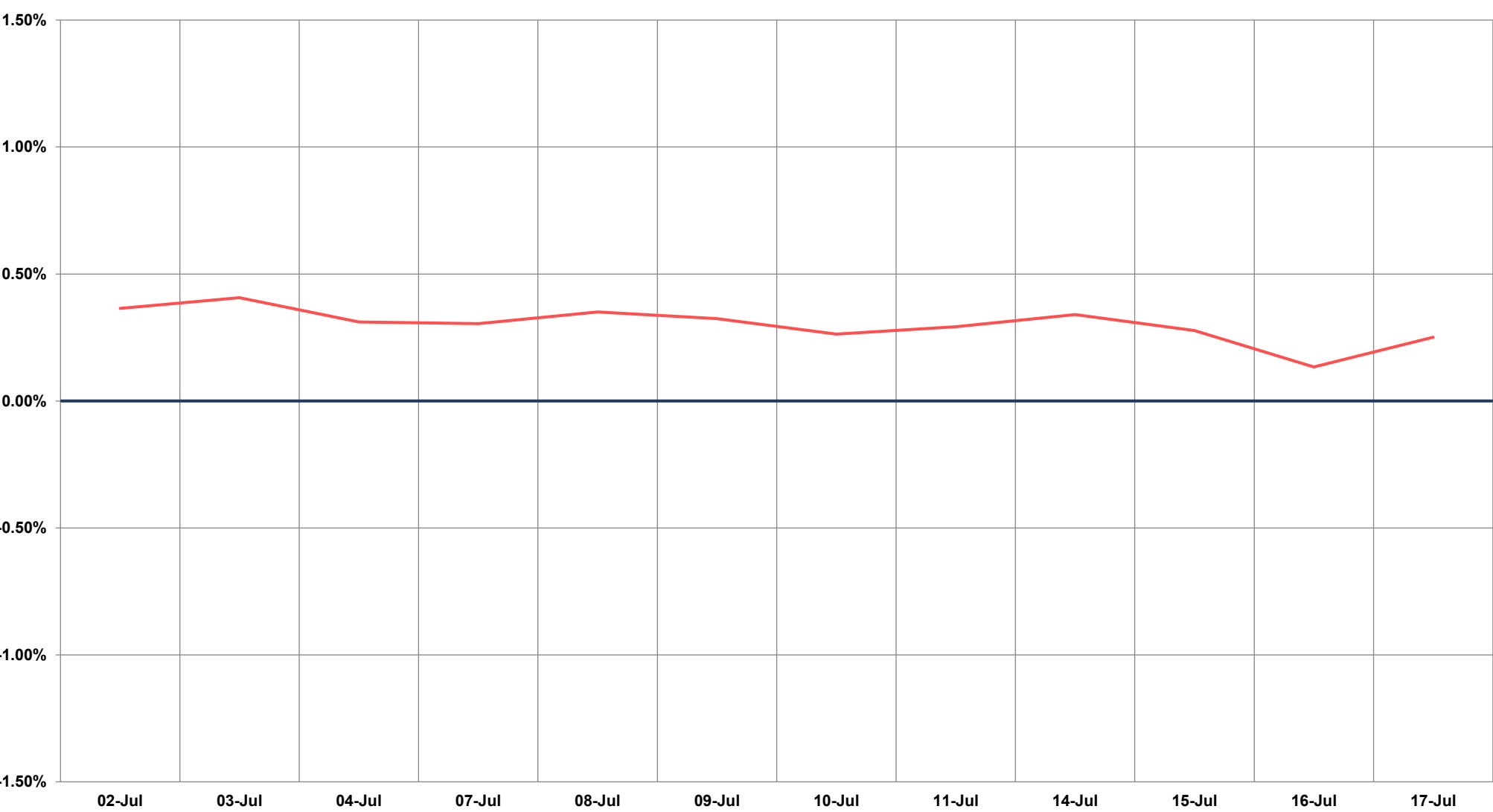
TECHNICAL VIEWS



NIFTY FUTURES



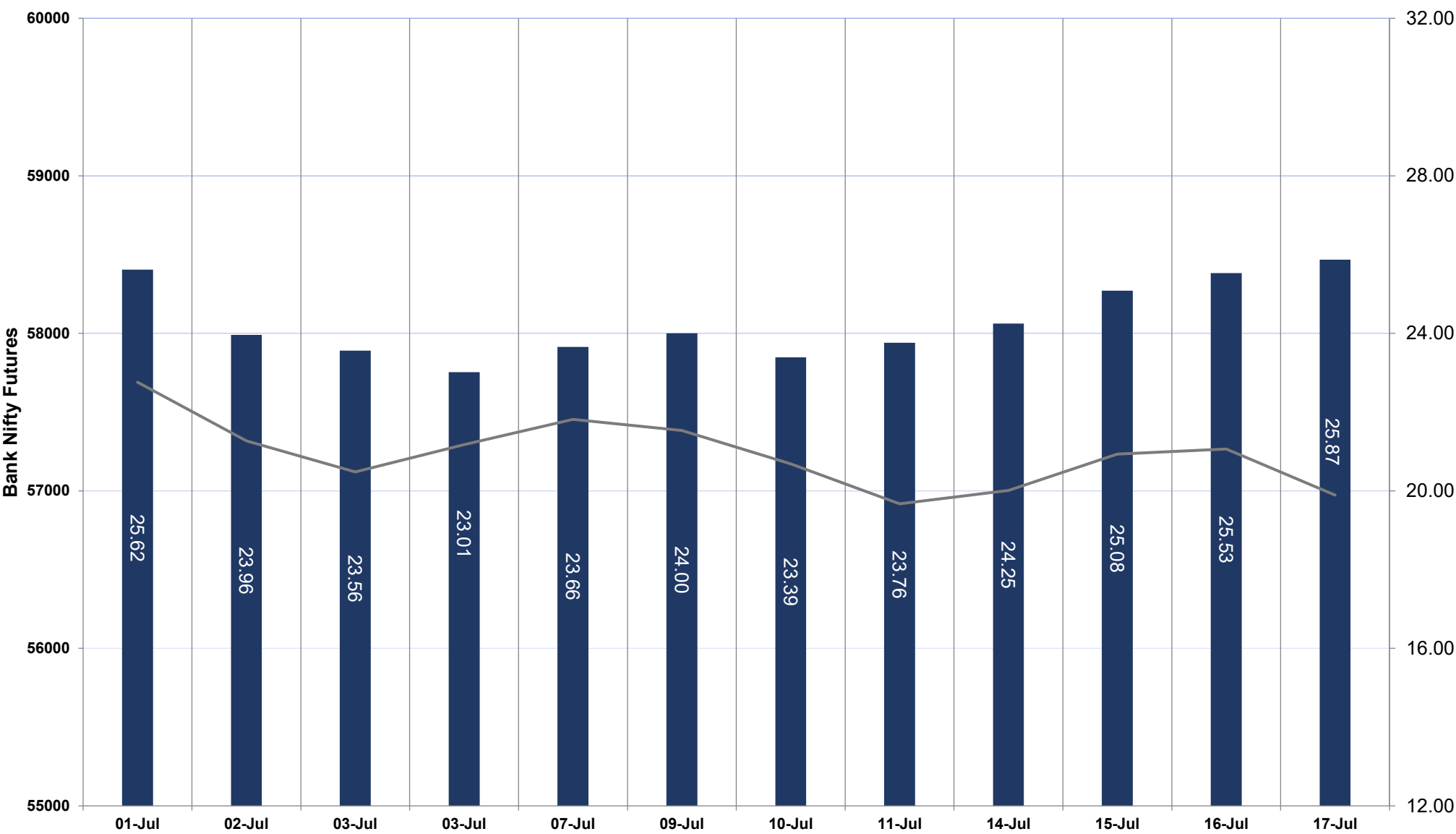
SPREAD: FUTURE & SPOT



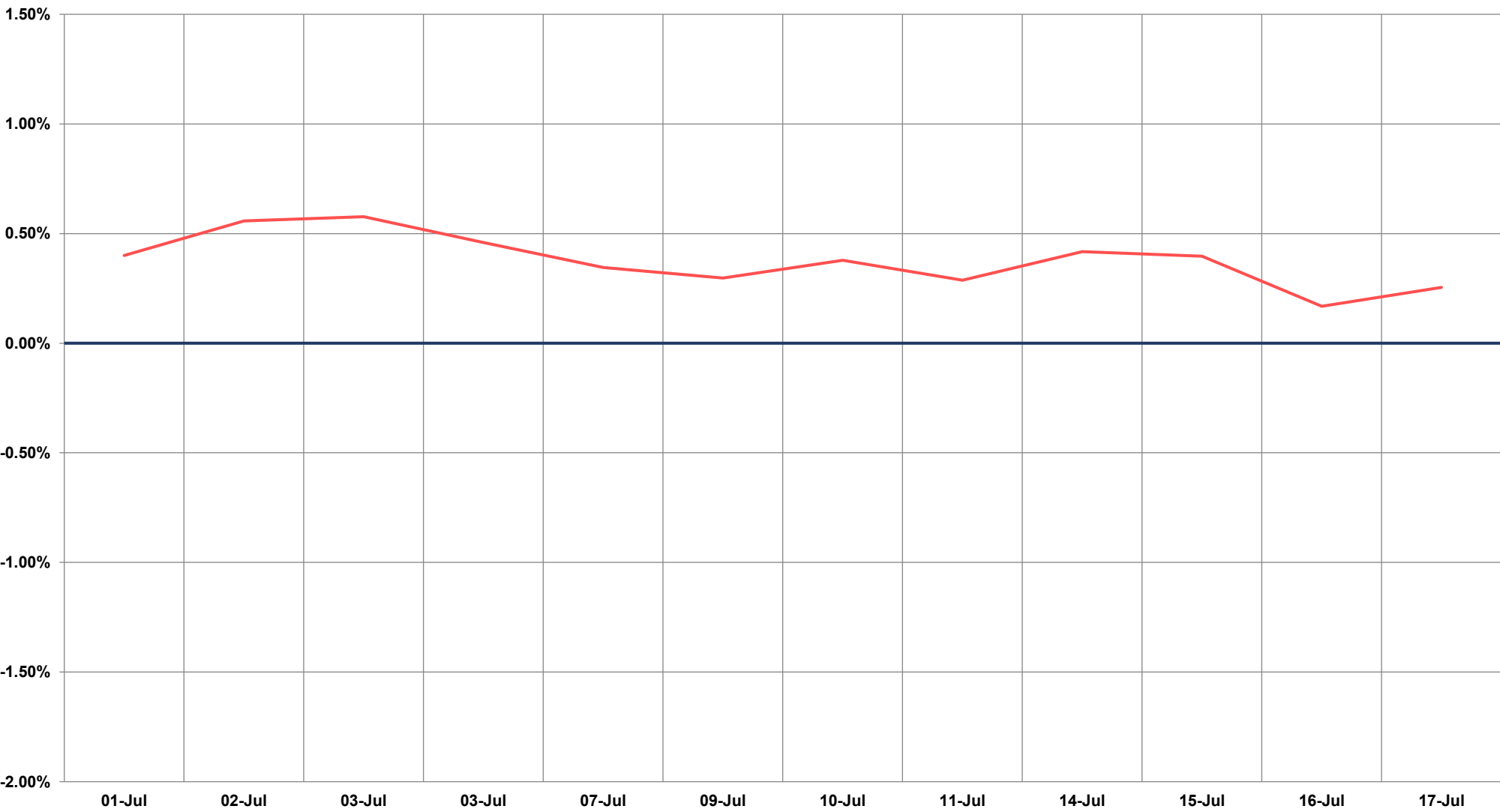
TECHNICAL VIEWS



BANK NIFTY FUTURES



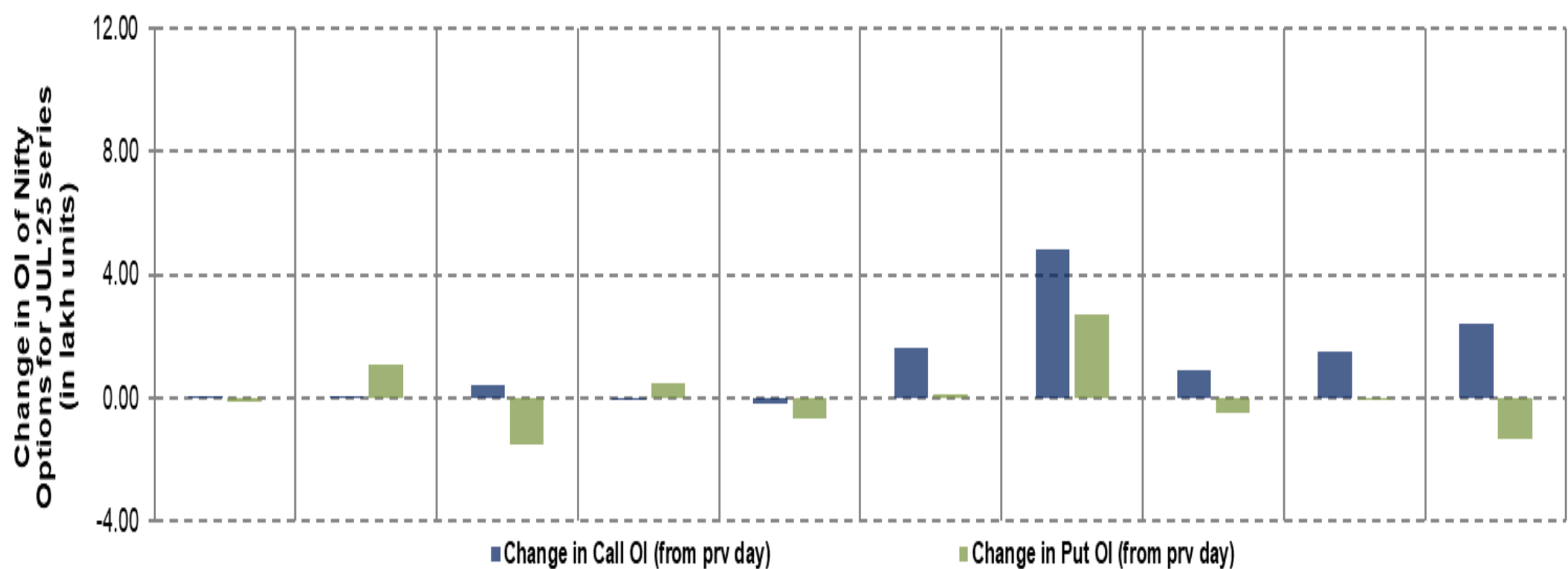
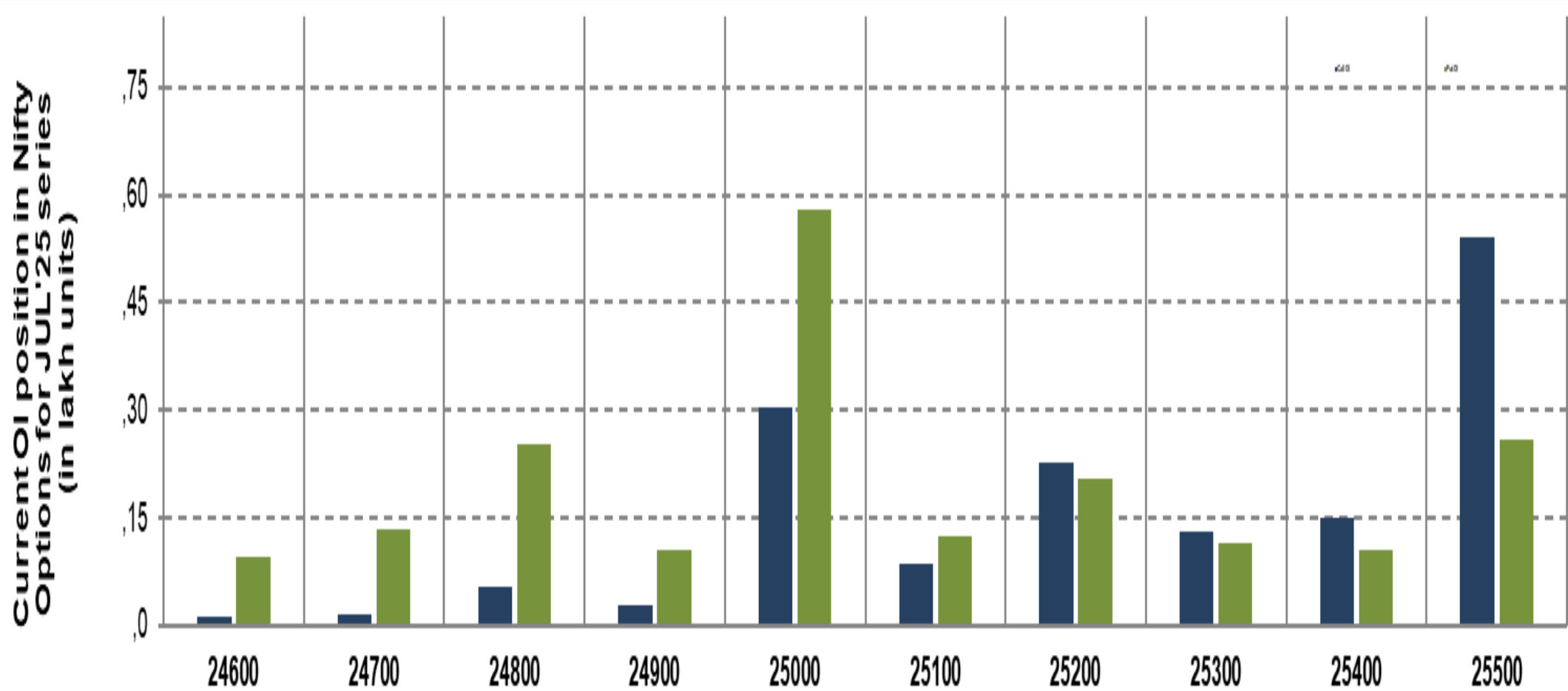
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.48 million in Open Interests is **Strike Price of 25200**
- **Most Active Nifty Put** with a addition of 0.27 millions in Open Interests is **Strike Price of 25200**
- **Maximum Open Interest an outstanding** was 5.40 millions for Calls at **Strike Price of 25500**
- **Maximum Open Interest an outstanding** was 5.78 millions for puts at **Strike Price of 25000**

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