



# MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

July 21, 2025



Indian equity benchmarks ended near day's high points on Monday, supported by strong Q1 earnings from heavyweights like HDFC Bank and ICICI Bank. After making a cautious start, soon indices added some gains and remained higher throughout the day, as traders took support with exchange data showed foreign institutional investors (FIIs) purchased equities worth Rs 374.74 crore on a net basis on Friday.

Some of the important factors in today's trade:

**India to attract \$100 billion in FDI from EFTA countries:** Some support also came as Union Commerce and Industry Minister Piyush Goyal said that India remains a key destination for overseas investments and is likely to attract \$100 billion in foreign direct investments (FDIs) from the four-nation European bloc European Free Trade Association (EFTA).

**Electronics exports jump 47% in Q1:** Some optimism came as the commerce ministry data showed that the US, UAE, and China have emerged as the top three export destinations for India's electronics sector during April-June quarter of 2025-26. During April-June this fiscal, the exports rose by 47 per cent to \$12.41 billion.

**PM Modi to visit UK:** Traders took note of report that Prime Minister Narendra Modi will be on two-day visit to the United Kingdom (UK) on July 23-24, which will focus on increasing bilateral trade, and the signing of the India-UK Free Trade Agreement (FTA) in London.

**Global front:** European markets were trading in red as EU leaders prepare for a high-stakes showdown over U.S. tariff threats. Asian markets ended mostly in green despite trade tensions persisted, and Japan's ruling coalition lost control of the upper house in an election on Sunday.

# MARKET SELFIE



## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	82200.34	442.61	0.54
NIFTY	25090.70	122.30	0.49
MIDCAP	47035.27	259.50	0.55
SMLCAP	55281	-4.44	-0.01
BSEFMC	20733.88	-101.45	-0.49
HEALTHCARE	44982.58	-145.96	-0.32
AUTO	53829.28	353.59	0.66
POWER	6919.03	44.45	0.65
REALTY	7806.36	47.75	0.62
BSE IT	36443.62	-110.83	-0.30
BANKEX	63545.83	804.18	1.28
OIL GAS	27699.45	-195.72	-0.70
METAL	31769.68	309.77	0.98
INDIA VIX	11.20	-0.19	-1.67

## ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1488	1478	104
BSE	1892	2264	171

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	6594	9995	(34)
NSE CASH	91473	93116	(2)
NSE F&O	153511	149429	3

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	22.58	3.47	1.32
SENSEX	23.54	4.37	1.20

# KEY NUMBERS TRACKER



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

FII-DII*	Buy	Sell	Net
DII	13499	9944	3555
FII	10566	12299	(1733)

Note: FPI & DII Figures are provisional

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

FII	Buy	Sell	Net
Ind. Futures	2926.87	2356.53	570
Ind. Options	743010.21	752490.32	(9480)
Stk. Futures	20681.94	20963.64	(282)
Stk. Options	31921.90	32157.59	(236)

## PUT-CALL RATIO

Index	Current	Previous
NIFTY	0.86	0.70
BANK NIFTY	0.83	0.78

## DOLLAR INDEX

Dollar Index	Current	Previous	% Change
DXY	97.86	98.48	-0.63

## 10-YEARS G-SEC YIELD

Country	Current	Previous	% Change
INDIA	6.300	6.305	-0.05
USA	4.359	4.431	-0.72

## KEY COMMODITIES TRACKER (in \$)

Commodity	Current	Change Points	% Change
Gold	3392.80	43.29	1.30
Silver	39	0.86	2.24
Crude-Oil	67.28	-0.05	-0.08
Brent-Crude	69.12	-0.11	-0.16



# CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES				
Expiry		Close	Change Points	% Change
29 JULY-25	USD-INR	86.33	0.16	0.19
29 JULY-25	EUR-INR	100.66	0.28	0.27
29 JULY-25	GBP-INR	116.28	0.32	0.27
29 JULY-25	JPY- INR	58.51	0.31	0.53

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS						
Index	Close	S2	S1	Pivot	R1	R2
NIFTY	25091	24799	24945	25028	25174	25257
SENSEX	82200	81242	81721	81998	82477	82753
NIFTY FUTURES	25128	24844	24986	25063	25205	25282
BANK NIFTY	56953	56003	56478	56731	57206	57458
CNX IT	37032	36607	36820	36992	37204	37377
CNX MIDCAP	59468	58593	59031	59285	59722	59976
CNX SMALLCAP	18958	18796	18877	18933	19014	19070
INDIA VIX	11.20	10.56	10.88	11.41	11.73	12.26

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

SECURITIES BAN IN F&O TRADES FOR 21-07-2025
RBLBANK, BANDHANBNK

# TECHNICAL VIEWS



## NIFTY

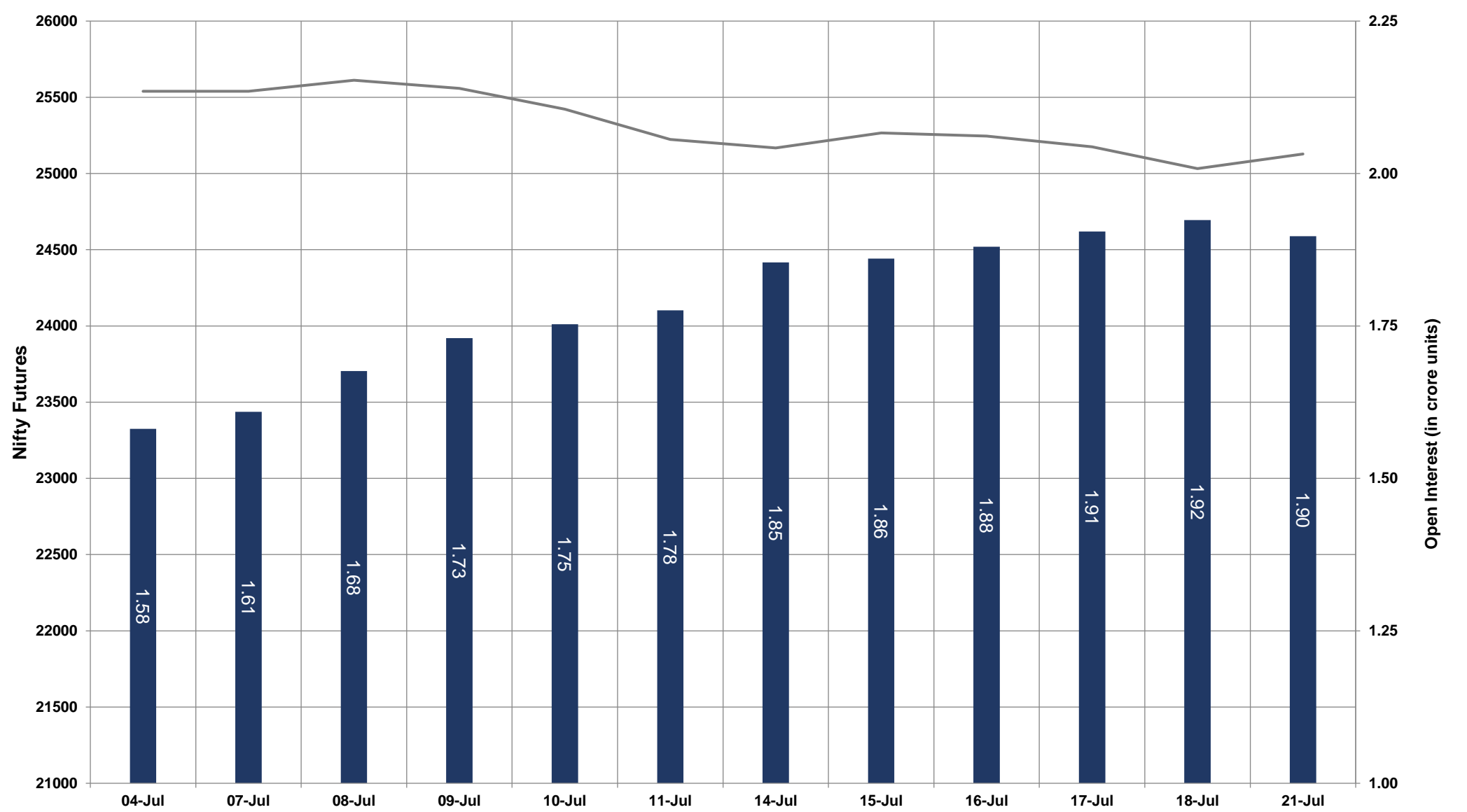


- Nifty Cash = **25090.70 (-0.49%)**
- Resistance levels = **25150** and **25220**
- Support levels = **25170** and **25250**

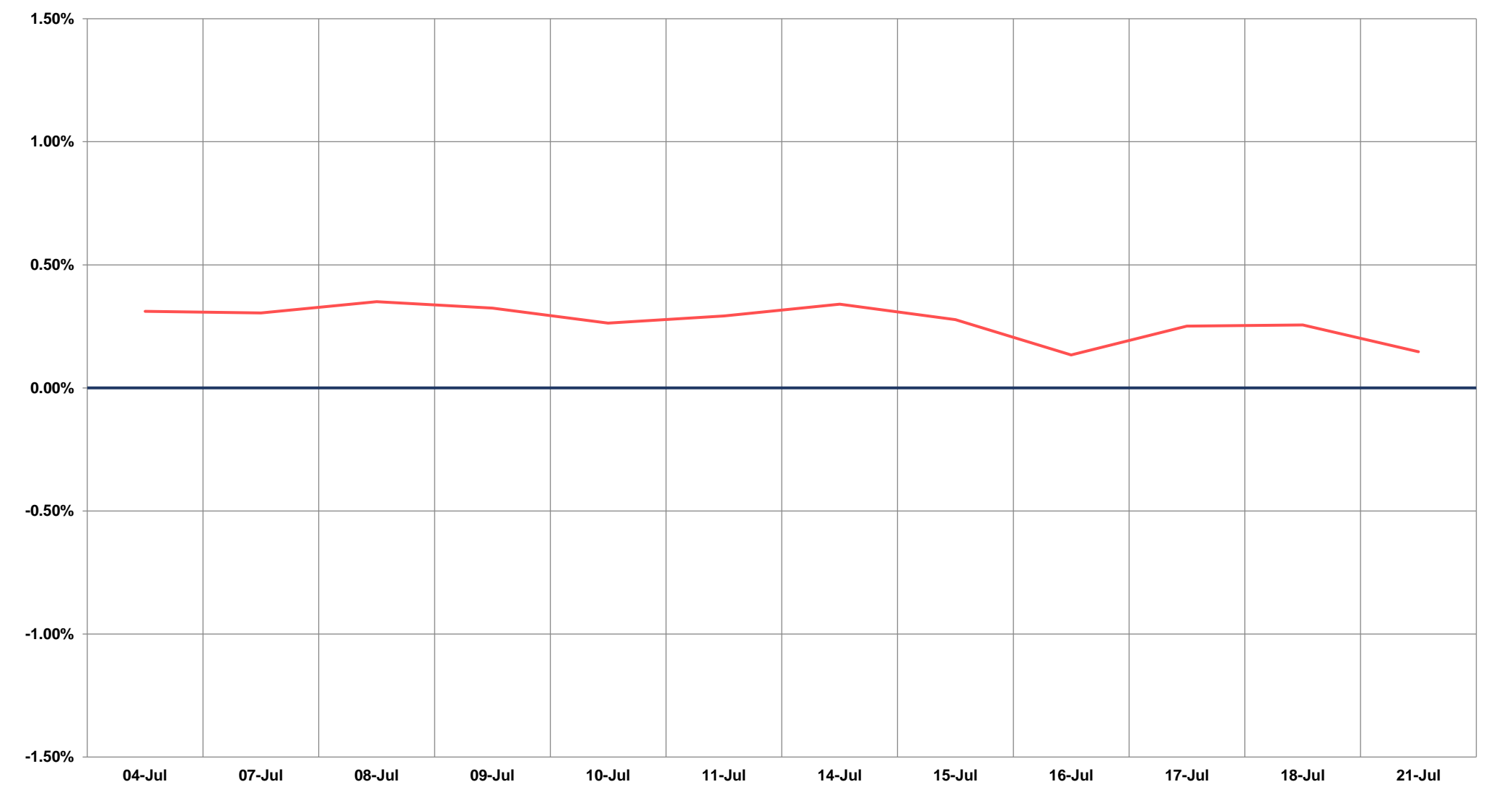
# TECHNICAL VIEWS



## NIFTY FUTURES



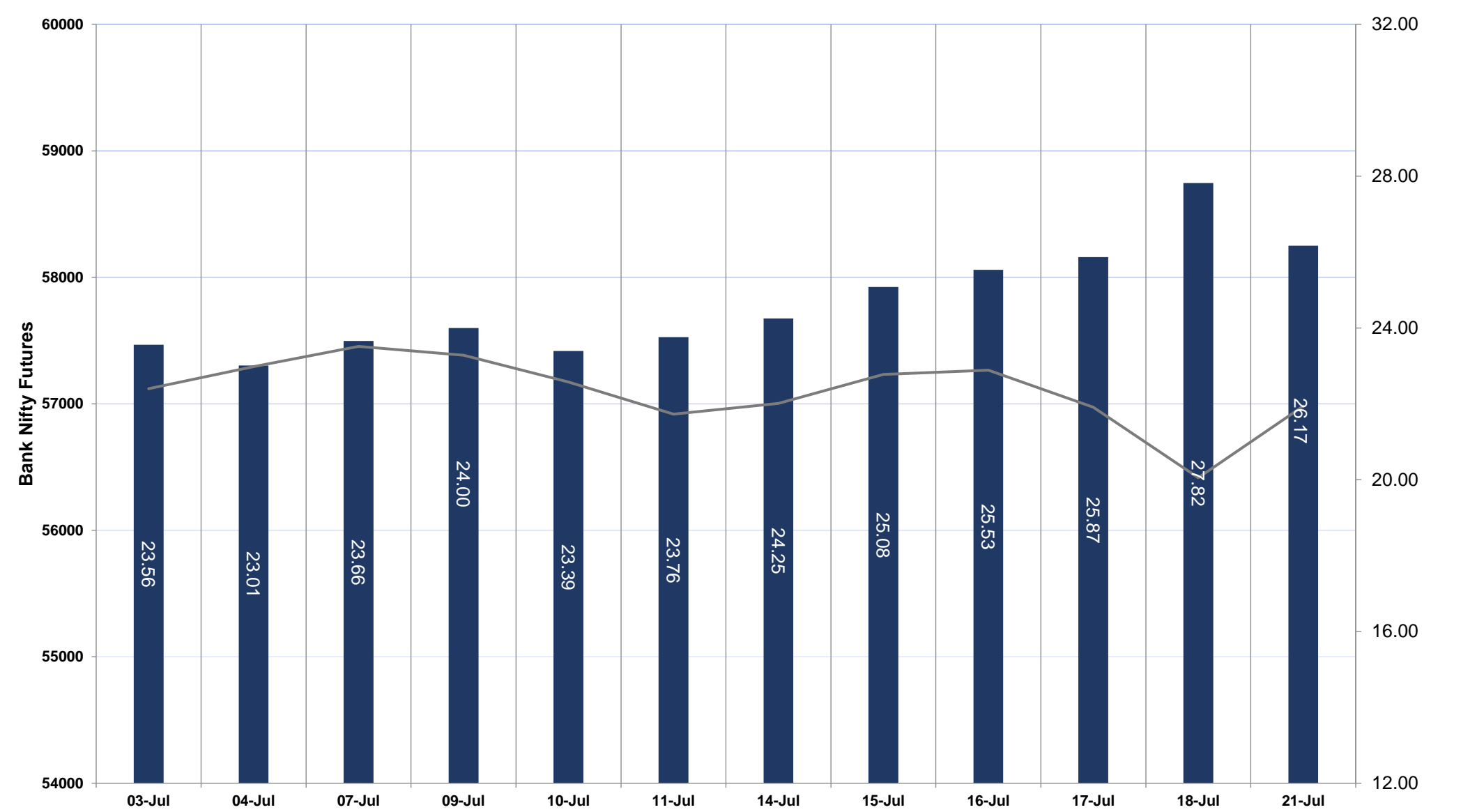
## SPREAD: FUTURE & SPOT



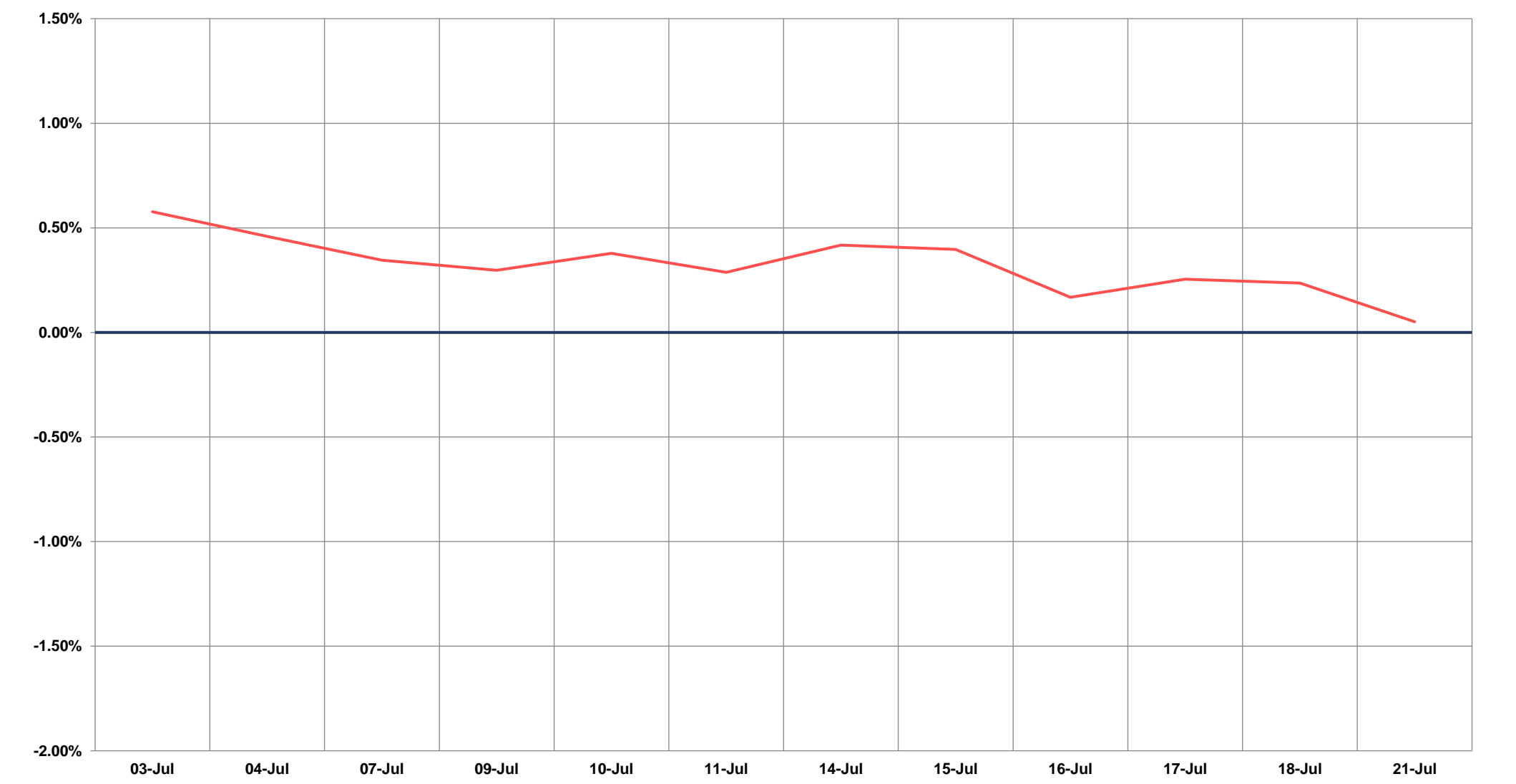
# TECHNICAL VIEWS



## BANK NIFTY FUTURES



## SPREAD: FUTURE & SPOT

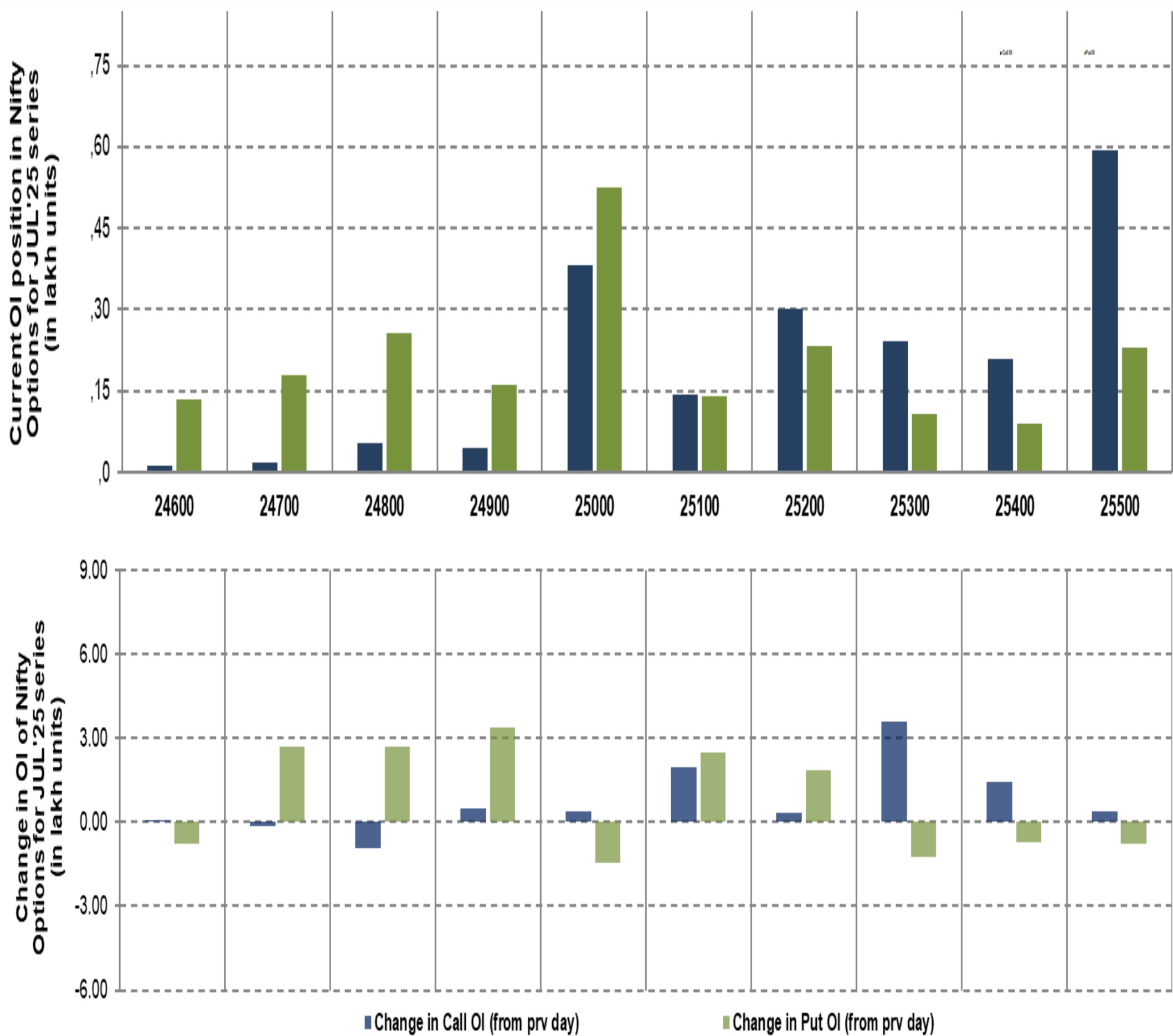




# TECHNICAL VIEWS



## NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.35 million in Open Interests is **Strike Price of 25300**
- **Most Active Nifty Put** with a subtraction of 0.26 millions in Open Interests is **Strike Price of 24800**
- **Maximum Open Interest an outstanding** was 5.92 millions for Calls at **Strike Price of 25500**
- **Maximum Open Interest an outstanding** was 5.25 millions for puts at **Strike Price of 25000**

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