



# MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

July 22, 2025



Indian equity benchmarks ended in negative territory on Tuesday, amid caution surrounding June quarter earnings. After making a positive start, soon indices pared gains and hovered around the flatline for most of the session, as investors awaited clarity on trade developments ahead of the August 1 deadline for U.S. reciprocal tariffs.

Some of the important factors in today's trade:

FII's offload equities worth Rs 1,681.23 crore: Some concerns came as exchange data showed that foreign institutional investors (FIIs) offloaded equities worth Rs 1,681.23 crore on a net basis on Monday.

India's eight core infrastructure sectors' growth slowed down to 1.7% in June: Traders were cautious with the government data which showed that India's eight core infrastructure sectors' growth slowed down to 1.7 per cent in June 2025 from 5 per cent in the same month last year.

India's sustained economic growth positions it as global stability anchor: Traders took note of report that Vice Chairman (VC) of NITI Aayog Suman Bery has said that India's sustained economic growth makes it an anchor of stability for the world, which needs new engines of growth and development models that can be scaled and shared.

Global front: European markets were trading mostly in red as traders remained cautious amid disappointing earnings reports. Asian markets ended mostly in red amid continued uncertainty over U.S. President Donald Trump's reciprocal tariffs on imports from trading partners, though he set a deadline of August 1 to reach deals.

# MARKET SELFIE



## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	82186.81	-13.53	-0.02
NIFTY	25060.90	-29.80	-0.12
MIDCAP	46745.58	-289.69	-0.62
SMLCAP	55186.44	-94.54	-0.17
BSEFMC	20680.92	-52.96	-0.26
HEALTHCARE	44697.96	-284.62	-0.63
AUTO	53411.38	-417.90	-0.78
POWER	6891.83	-27.20	-0.39
REALTY	7727.62	-78.74	-1.01
BSE IT	36252.26	-191.36	-0.53
BANKEX	63434.44	-111.39	-0.18
OIL GAS	27617.33	-82.12	-0.30
METAL	31715.59	-54.09	-0.17
INDIA VIX	10.75	-0.45	-4.02

## ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1284	1677	235
BSE	1728	2300	170

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	7596	6594	15
NSE CASH	100574	91473	10
NSE F&O	134910	153511	(12)

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	22.15	3.47	1.32
SENSEX	23.53	4.37	1.20

# KEY NUMBERS TRACKER



FII – DII ACTIVITY IN CASH SEGMENT (₹ in Crs)			
FII-DII*	Buy	Sell	Net
DII	16183	11139	5044
FII	12570	16137	(3567)

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)			
FII	Buy	Sell	Net
Ind. Futures	1615.78	2413.42	(798)
Ind. Options	655768.48	654271.21	1497
Stk. Futures	18830.65	20345.87	(1515)
Stk. Options	27668.61	27634.46	34

PUT-CALL RATIO		
Index	Current	Previous
NIFTY	0.70	0.86
BANK NIFTY	0.74	0.83

DOLLAR INDEX			
Dollar Index	Current	Previous	% Change
DXY	97.72	97.85	-0.13

10-YEARS G-SEC YIELD			
Country	Current	Previous	% Change
INDIA	6.309	6.300	0.16
USA	4.337	4.359	-0.96

KEY COMMODITIES TRACKER (in \$)			
Commodity	Current	Change Points	% Change
Gold	3425.06	28.96	0.85
Silver	39.07	0.11	0.29
Crude-Oil	65.02	-2.00	-3.00
Brent-Crude	68.31	-0.71	-1.03

# CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES				
Expiry		Close	Change Points	% Change
29 JULY-25	USD-INR	86.56	0.11	0.12
29 JULY-25	EUR-INR	101.15	0.50	0.49
29 JULY-25	GBP-INR	116.55	0.28	0.24
29 JULY-25	JPY- INR	58.82	0.28	0.47

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS						
Index	Close	S2	S1	Pivot	R1	R2
NIFTY	25061	24946	25004	25093	25150	25239
SENSEX	82187	81851	82019	82279	82446	82706
NIFTY FUTURES	25094	24991	25043	25121	25173	25251
BANK NIFTY	56756	56317	56537	56911	57131	57506
CNX IT	36859	36642	36751	36936	37044	37229
CNX MIDCAP	59103	58642	58873	59270	59501	59898
CNX SMALLCAP	18893	18749	18821	18951	19023	19153
INDIA VIX	10.75	10.35	10.55	10.89	11.09	11.43

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

SECURITIES BAN IN F&O TRADES FOR 22-07-2025
IEX, RBLBANK, BANDHANBNK



# TECHNICAL VIEWS



## NIFTY

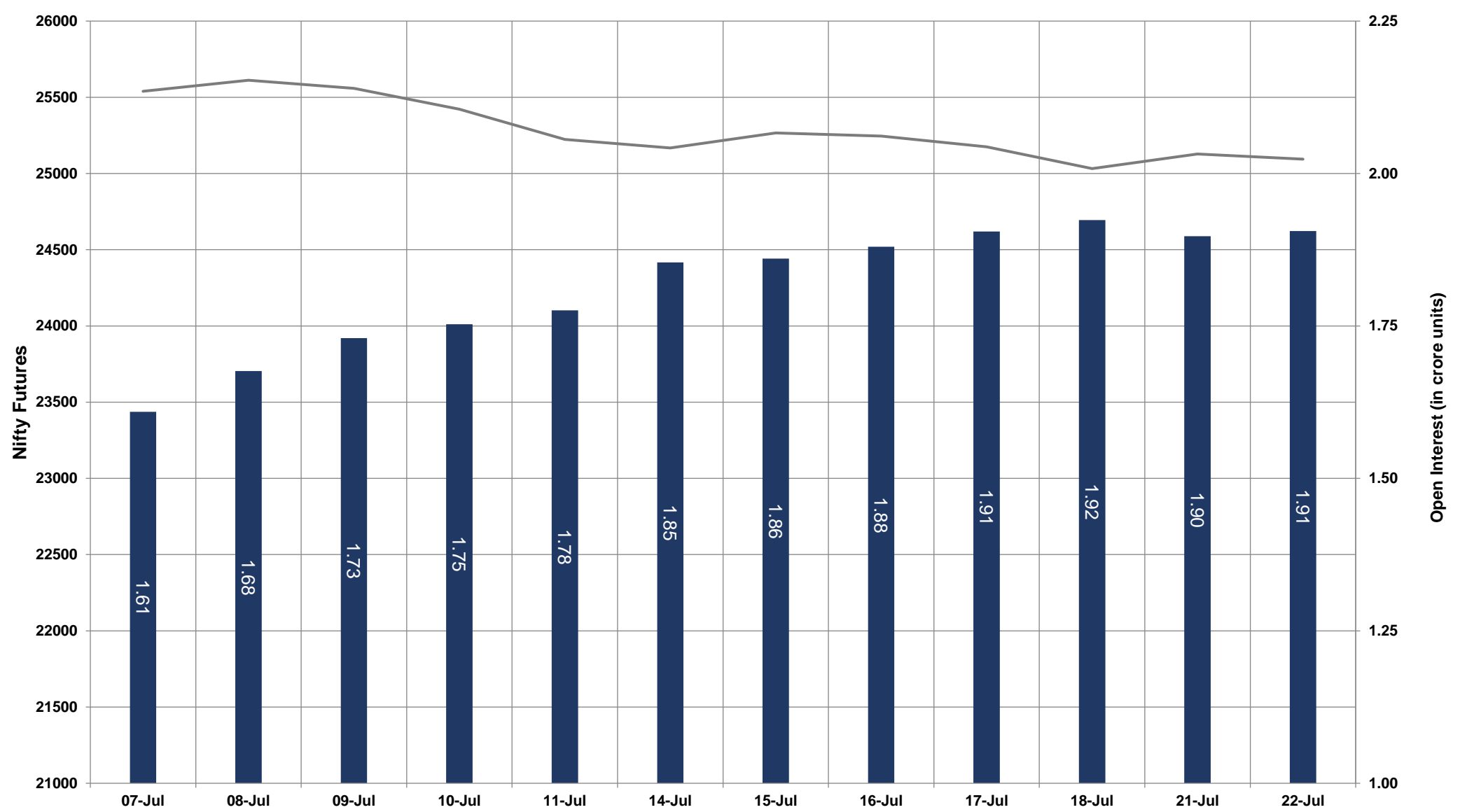


- Nifty Cash = **25060.90 (-0.12%)**
- Resistance levels = **25185** and **25250**
- Support levels = **24980** and **24880**

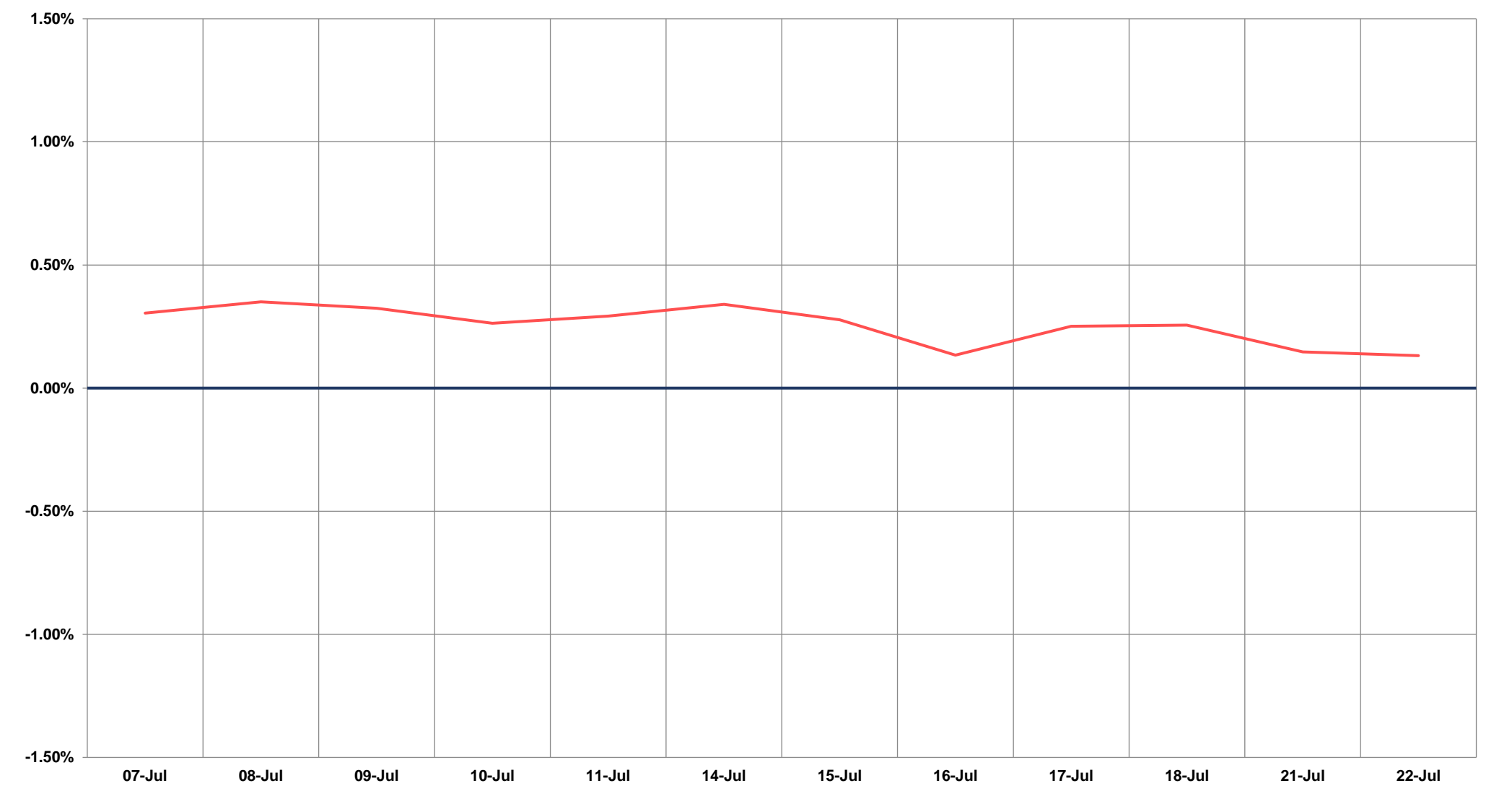
# TECHNICAL VIEWS



## NIFTY FUTURES



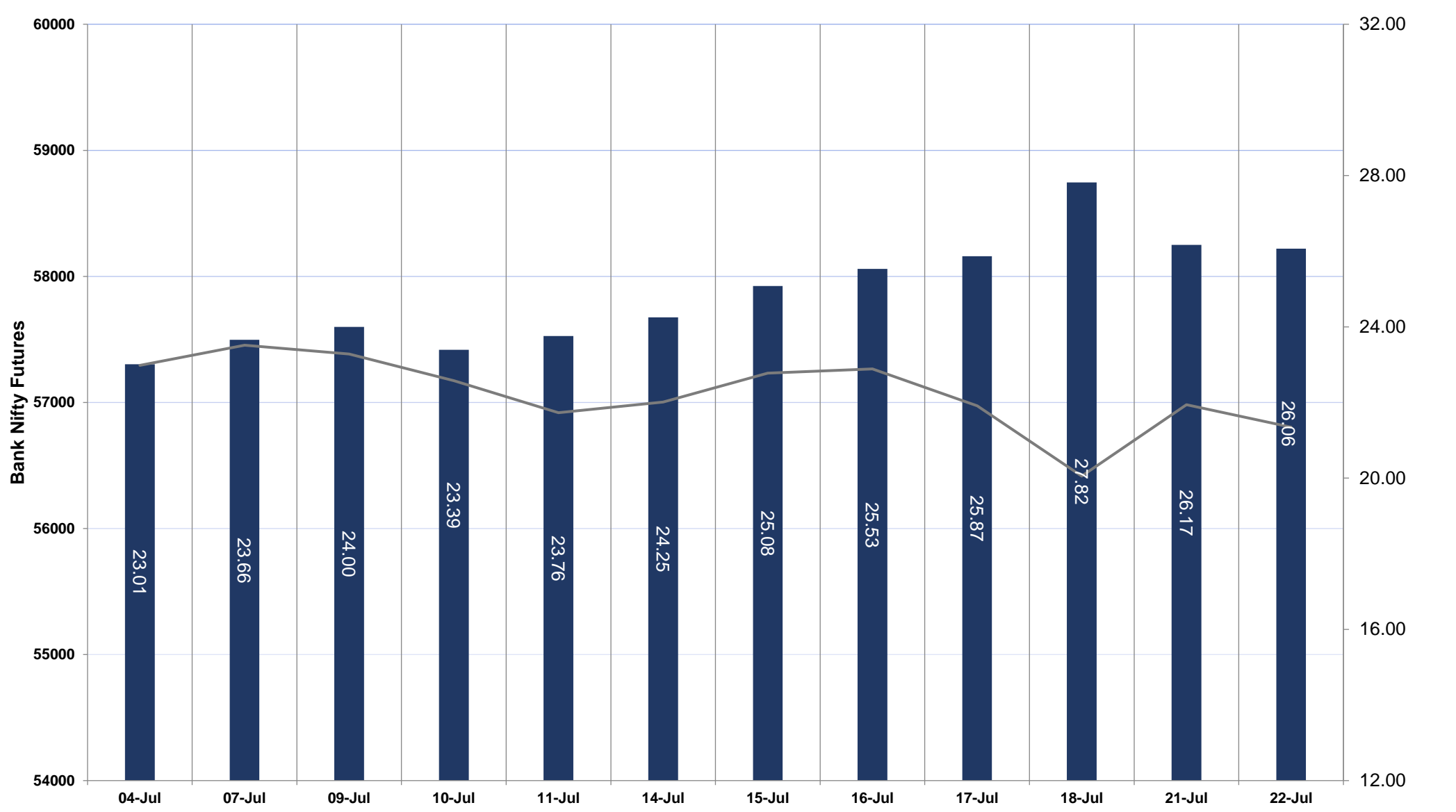
## SPREAD: FUTURE & SPOT



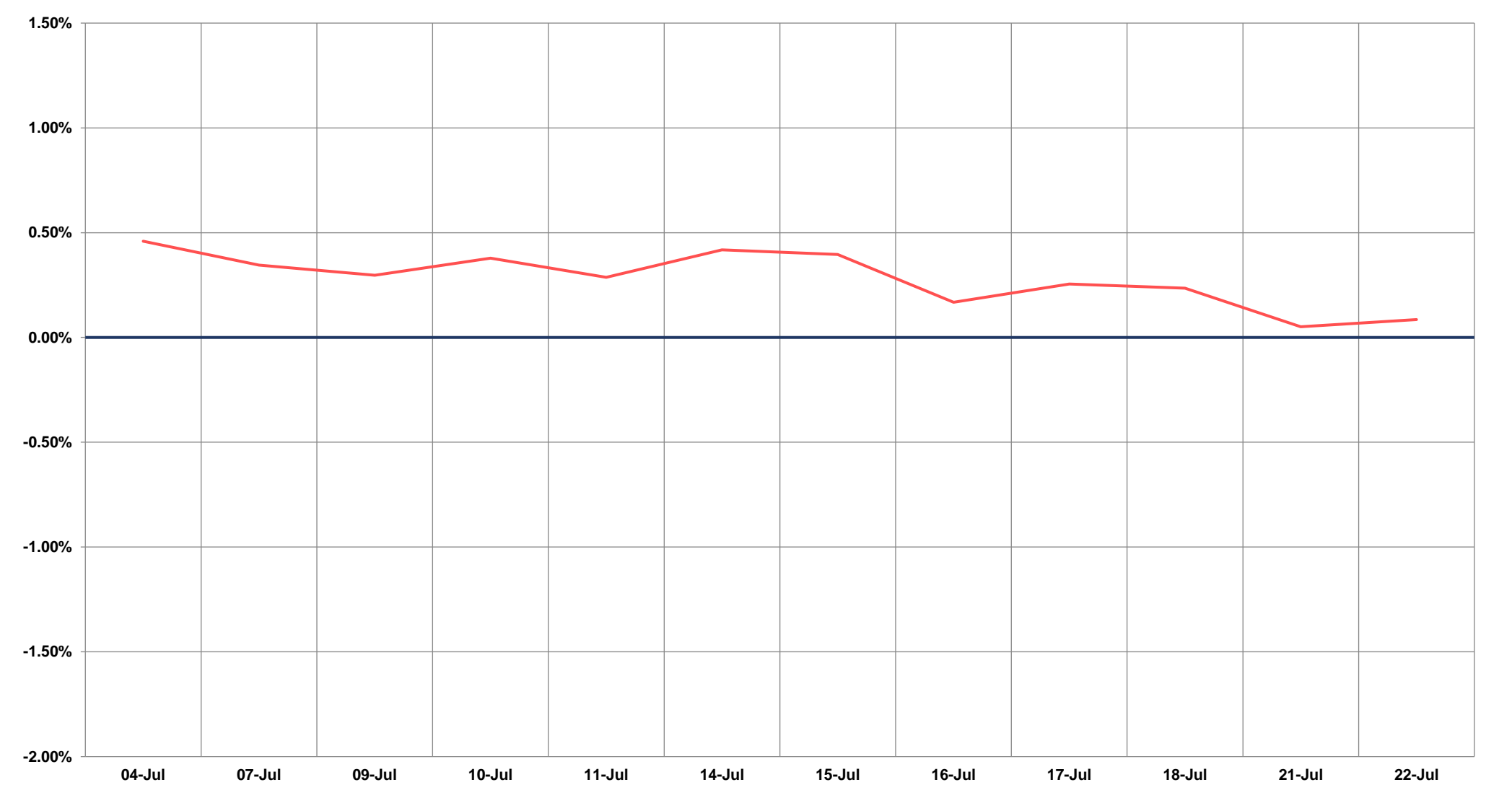
# TECHNICAL VIEWS



## BANK NIFTY FUTURES



## SPREAD: FUTURE & SPOT

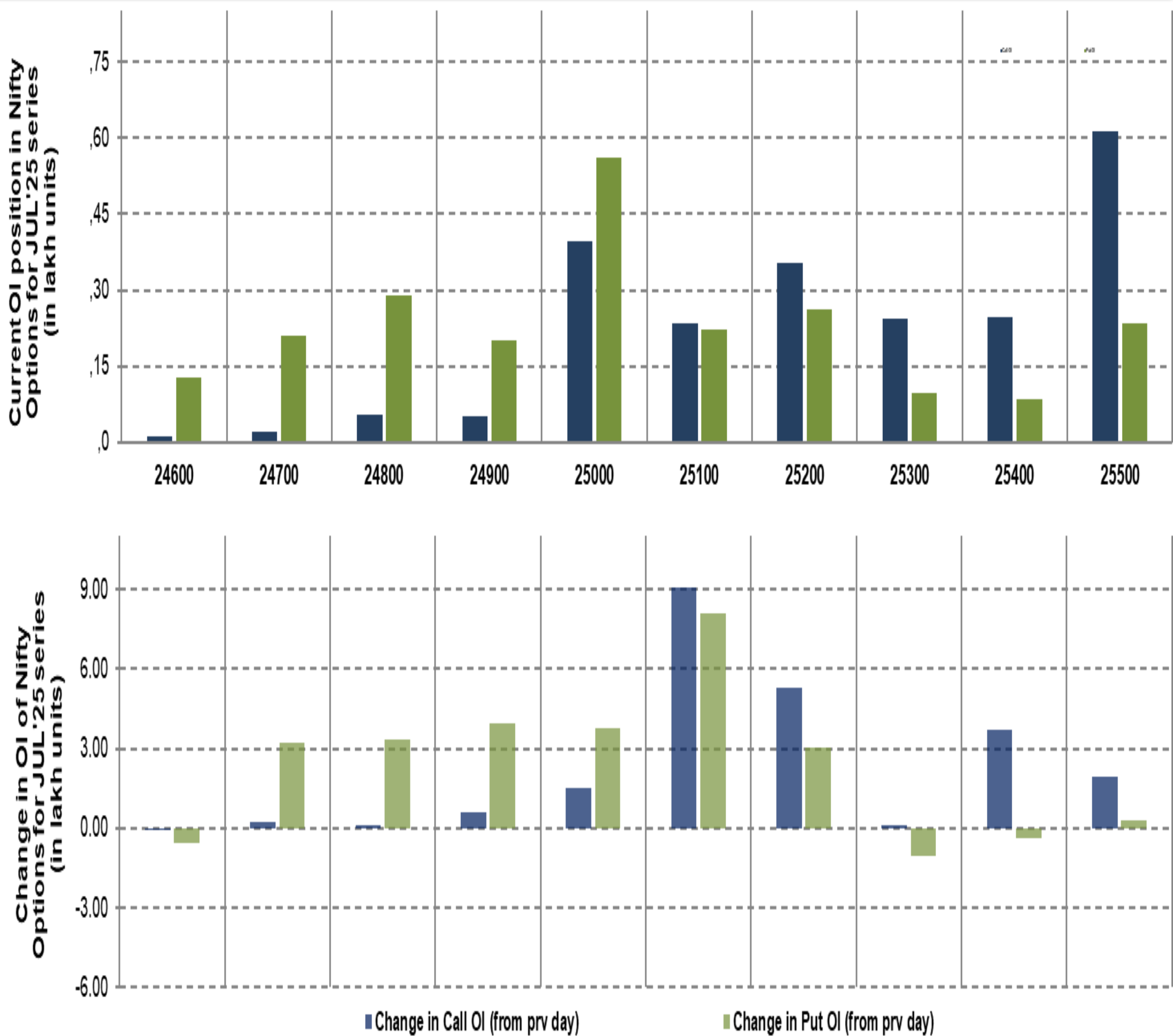




# TECHNICAL VIEWS



## NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.91 million in Open Interests is **Strike Price of 25100**
- **Most Active Nifty Put** with a addition of 0.80 millions in Open Interests is **Strike Price of 24800**
- **Maximum Open Interest an outstanding** was 6.12 millions for Calls at **Strike Price of 25500**
- **Maximum Open Interest an outstanding** was 5.62 millions for puts at **Strike Price of 25000**

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