



# MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

July 24, 2025



Indian equity benchmarks ended with significant losses on Thursday, with both the Nifty and Sensex closing over half a percent cut. Investors' sentiments remained subdued due to the weekly F&O expiry. Despite strong June quarter earnings from Infosys, markets failed to gain momentum. After making a slightly positive start, indices quickly turned negative and remained in the red throughout the session. Uncertainty surrounding the India-US trade deal and persistent foreign fund outflows further weighed on investors' sentiments.

Some of the important factors in today's trade:

India's net FDI plunges 98% to \$35 million in May: Traders were cautious as the Reserve Bank of India's latest monthly bulletin stated that net foreign direct investment (FDI) into India fell 98% year-on-year to \$35 million in May 2025 amid higher repatriation by overseas investors and a fall in gross inflows.

A 10% rise in crude prices can lead to 0.20% rise in domestic inflation: Some cautiousness came as a paper by RBI staffers release indicated that a 10 per cent increase in global crude oil prices can raise the domestic headline inflation by 0.20 per cent.

Trade pact between the US and Indonesia raises concerns in India: Sentiments remained downbeat as Think tank GTRI said that the US-Indonesia trade pact reflects how Washington's pressure tactics can compel countries to cut tariffs, commit to large purchases, and loosen regulatory control, and India should tread cautiously in ongoing trade talks to avoid similar concessions.

Global front: European markets were trading in green, as investors digested a slew of earnings and awaited the European Central Bank's interest-rate decision later in the day. Asian markets ended mostly in green, after Japan's private sector logged a steady growth in July as stronger growth in the service sector was offset by a fall in manufacturing output.

# MARKET SELFIE



## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	82184.17	-542.47	-0.66
NIFTY	25062.10	-157.80	-0.63
MIDCAP	46658.44	-199.81	-0.43
SMLCAP	54940	-274.90	-0.50
BSEFMC	20362.89	-223.30	-1.08
HEALTHCARE	45246.93	234.24	0.52
AUTO	53889.40	18.42	0.03
POWER	6869.51	-40.49	-0.59
REALTY	7447.58	-78.98	-1.05
BSE IT	35688.95	-669.38	-1.84
BANKEX	63541.81	-366.51	-0.57
OIL GAS	27609.92	-165.27	-0.60
METAL	31892.85	31.82	0.10
INDIA VIX	10.72	0.20	1.97

## ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1108	1860	89
BSE	1542	2517	162

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	7097	9602	(26)
NSE CASH	100060	93826	7
NSE F&O	177761	150746	18

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	22.15	3.46	1.31
SENSEX	23.53	4.37	1.19

# KEY NUMBERS TRACKER



FII – DII ACTIVITY IN CASH SEGMENT (₹ in Crs)			
FII-DII*	Buy	Sell	Net
DII	13138	10445	2692
FII	13175	15483	(2308)

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)			
FII	Buy	Sell	Net
Ind. Futures	3823.02	3821.37	2
Ind. Options	2352625.23	2354481.58	(1856)
Stk. Futures	20500.20	21447.97	(948)
Stk. Options	32299.03	32173.00	126

PUT-CALL RATIO		
Index	Current	Previous
NIFTY	0.76	0.98
BANK NIFTY	0.84	0.95

DOLLAR INDEX			
Dollar Index	Current	Previous	% Change
DXY	97.34	97.21	0.13

10-YEARS G-SEC YIELD			
Country	Current	Previous	% Change
INDIA	6.329	6.312	0.01
USA	4.419	4.390	0.03

KEY COMMODITIES TRACKER (in \$)			
Commodity	Current	Change Points	% Change
Gold	3372.84	-16.84	-0.49
Silver	39.03	-0.26	-0.66
Crude-Oil	66.18	0.76	1.19
Brent-Crude	69.36	0.72	1.04

# CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES				
Expiry		Close	Change Points	% Change
29 JULY-25	USD-INR	86.42	-0.04	-0.04
29 JULY-25	EUR-INR	101.55	0.12	0.12
29 JULY-25	GBP-INR	116.96	-0.08	-0.07
29 JULY-25	JPY- INR	58.76	-0.31	-0.53

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS						
Index	Close	S2	S1	Pivot	R1	R2
NIFTY	25062	24881	24972	25109	25199	25337
SENSEX	82184	81602	81893	82339	82630	83076
NIFTY FUTURES	25095	24904	25000	25145	25241	25386
BANK NIFTY	57066	56612	56839	57078	57305	57544
CNX IT	36136	35526	35831	36403	36707	37279
CNX MIDCAP	58961	58556	58758	59035	59237	59513
CNX SMALLCAP	18687	18509	18598	18759	18847	19008
INDIA VIX	10.72	9.33	10.03	10.56	11.26	11.79

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	Neutral	Buy	Buy
CNX SMALLCAP	Neutral	Buy	Buy
INDIA VIX	Sell	Sell	Neutral

SECURITIES BAN IN F&O TRADES FOR 24-07-2025
IEX, RBLBANK

# TECHNICAL VIEWS



## NIFTY

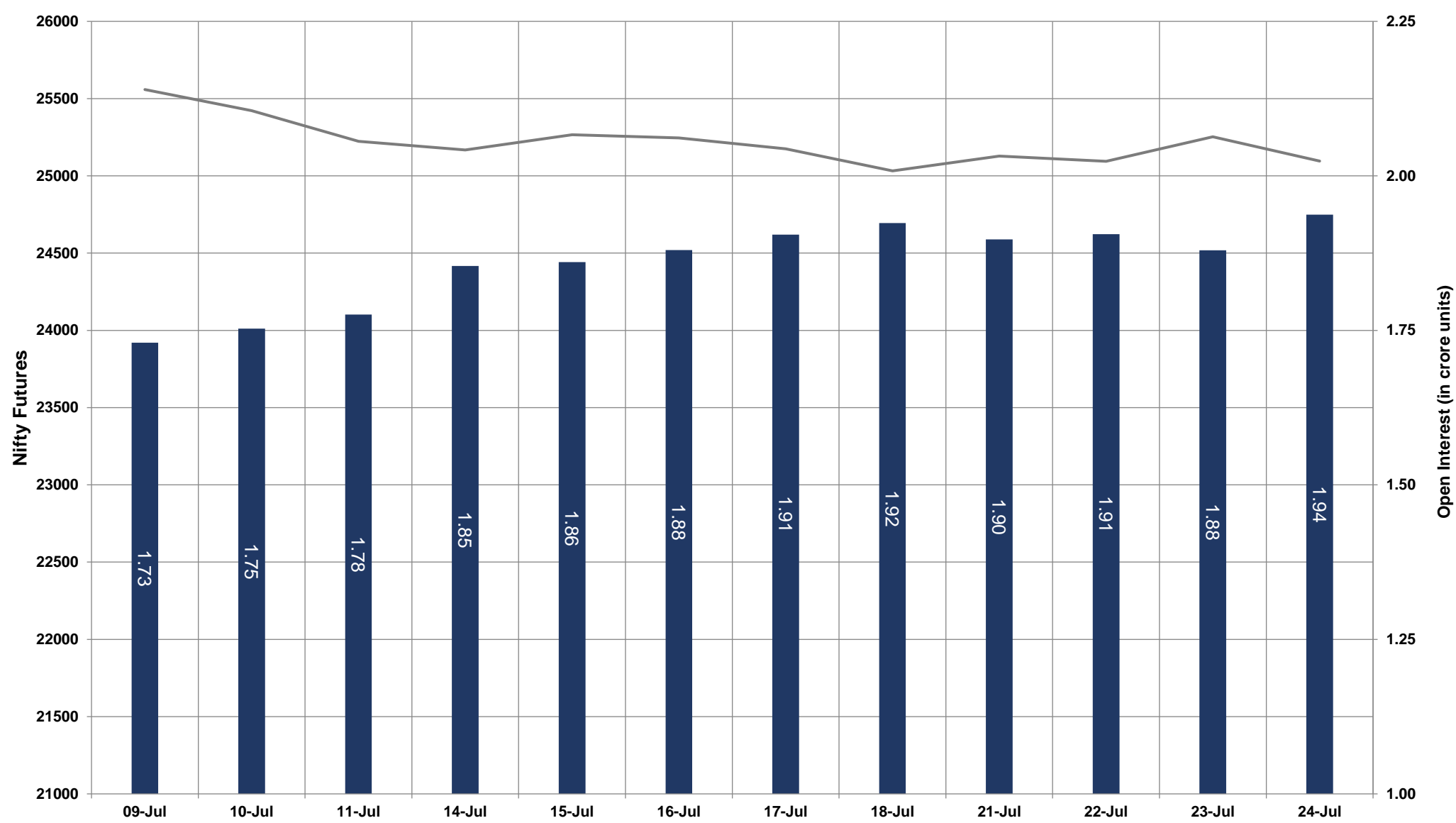


- Nifty Cash = **25062.10 (0.63%)**
- Resistance levels = **25275** and **25350**
- Support levels = **24915** and **24830**

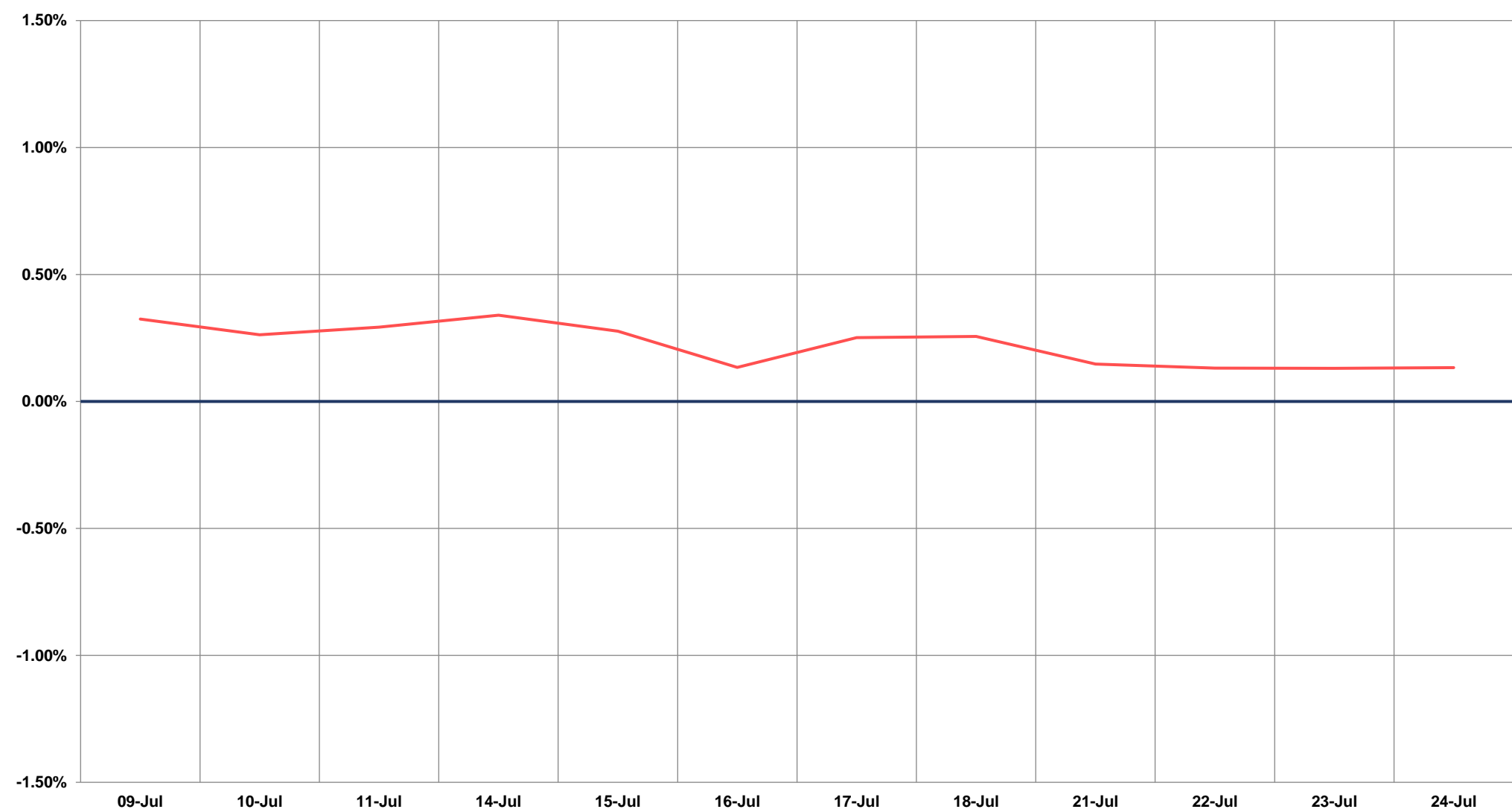
# TECHNICAL VIEWS



## NIFTY FUTURES



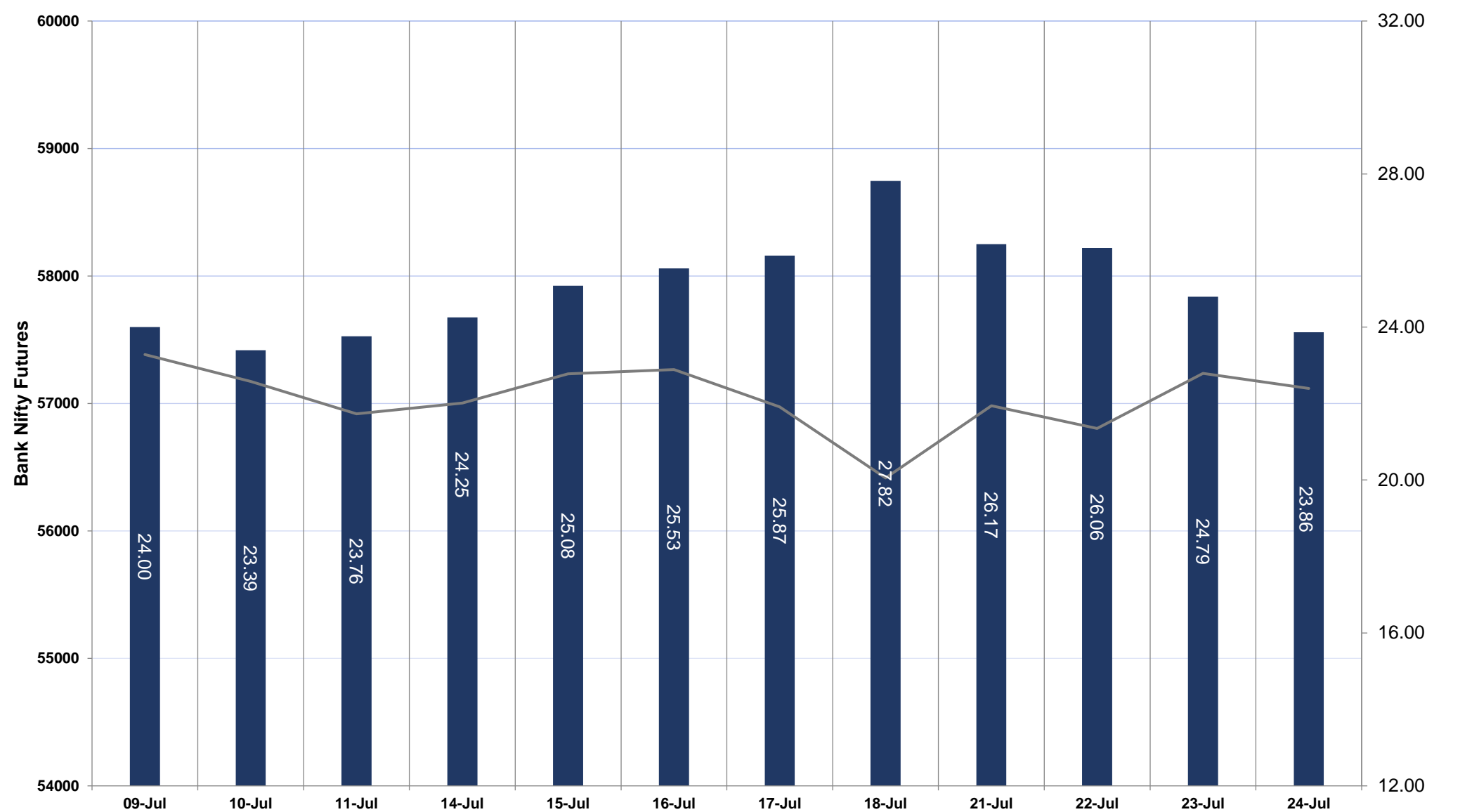
## SPREAD: FUTURE & SPOT



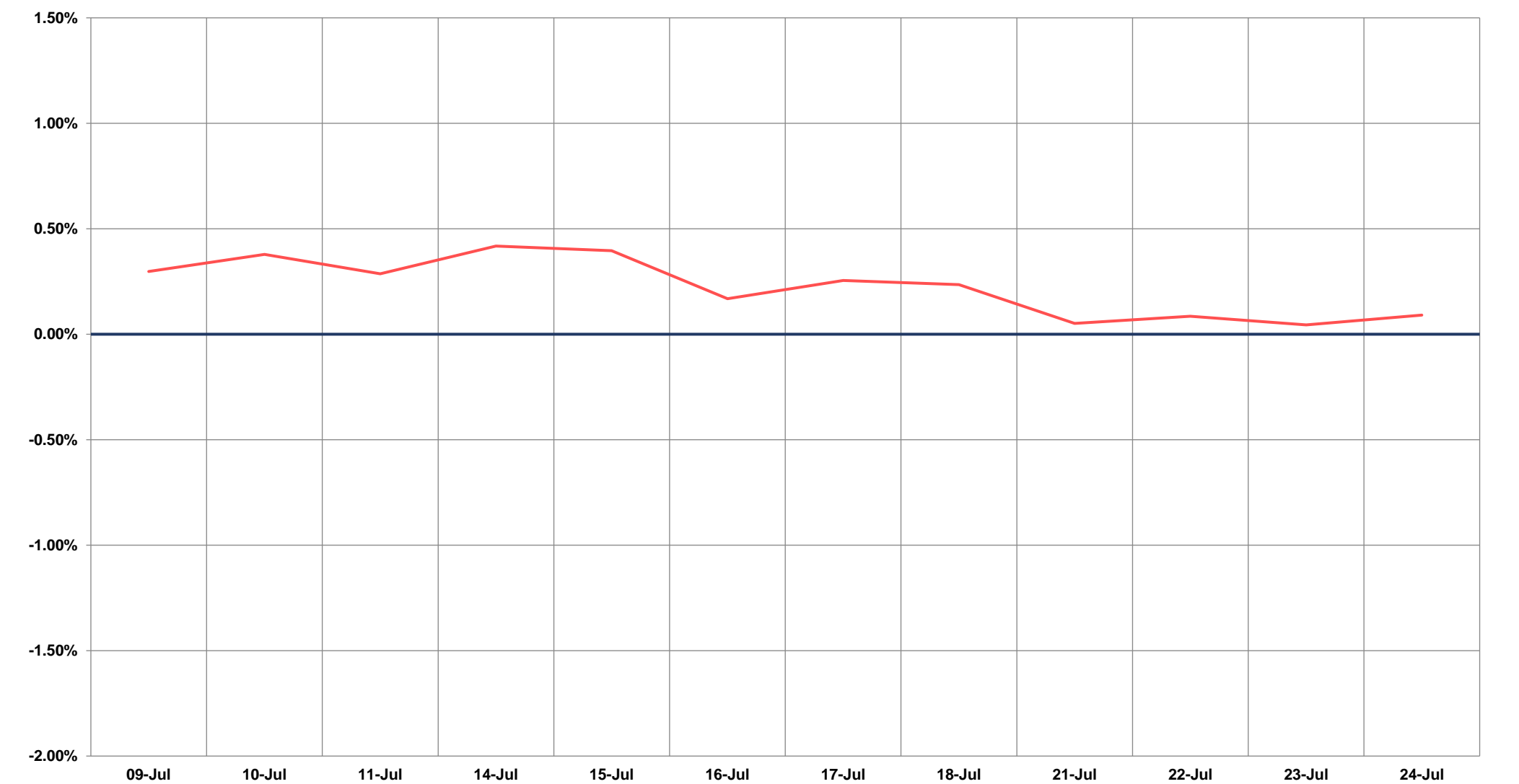
# TECHNICAL VIEWS



## BANK NIFTY FUTURES



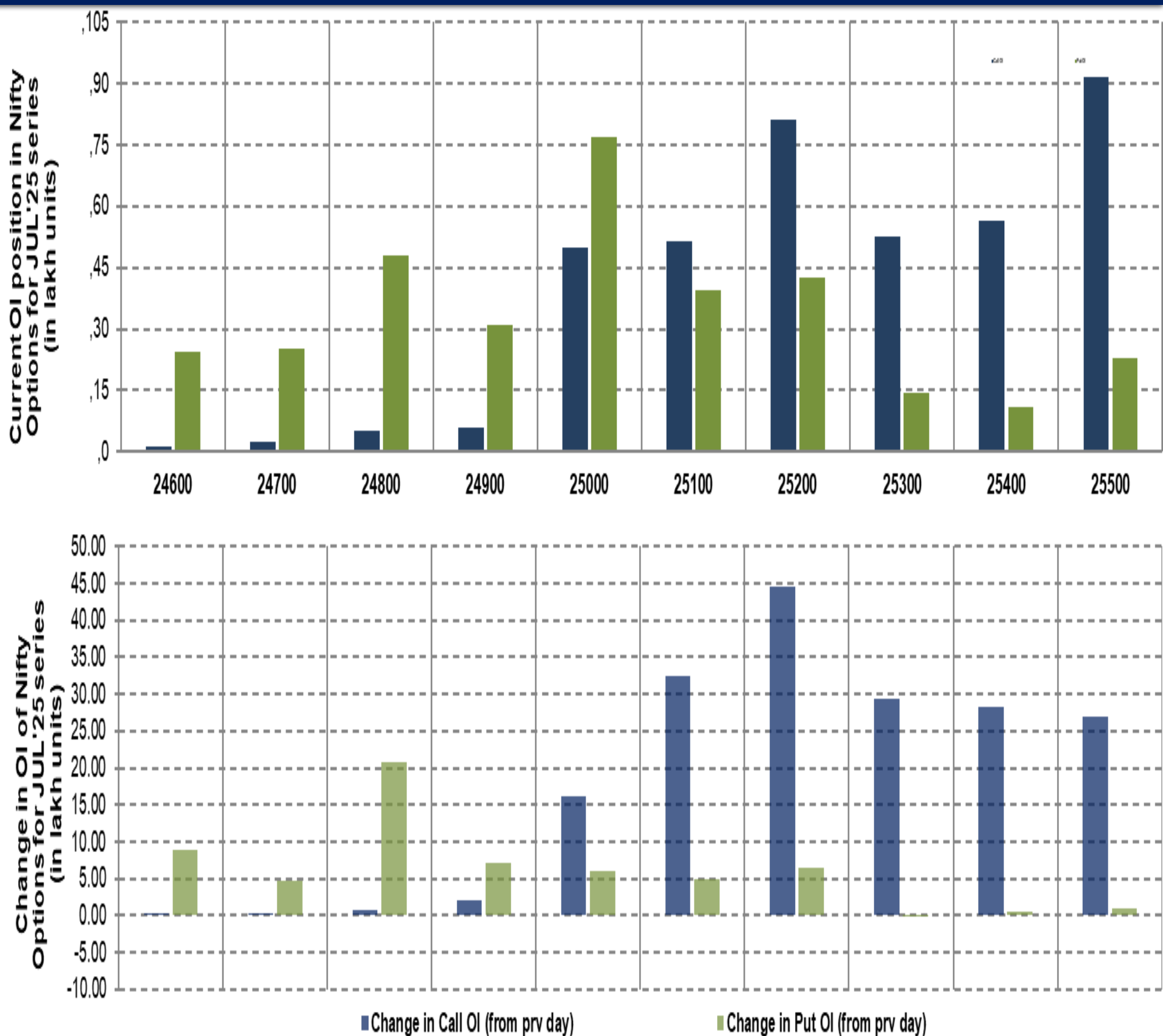
## SPREAD: FUTURE & SPOT



# TECHNICAL VIEWS



## NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of **4.45 million** in Open Interests is **Strike Price of 25200**
- **Most Active Nifty Put** with a addition of **2.08 millions** in Open Interests is **Strike Price of 24800**
- **Maximum Open Interest an outstanding** was **9.13 millions** for Calls at **Strike Price of 25500**
- **Maximum Open Interest an outstanding** was **7.67 millions** for puts at **Strike Price of 25000**

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