



# MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

July 25, 2025



Indian equity benchmarks ended extended their losses for second straight session on Friday, with both the Nifty and Sensex closing nearly 1% lower, dragged down by selling in heavyweight stocks. Markets made a negative start and remained under pressure throughout the day, as traders stayed cautious amid uncertainty surrounding the U.S. trade deal and continued selling by Foreign Institutional Investors.

Some of the important factors in today's trade:

FII's continue to exit Indian markets: Persistent foreign fund outflows dented domestic sentiments. Foreign Institutional Investors (FIIs) offloaded equities worth Rs 2,133.69 crore on Thursday, according to exchange data.

India-UK FTA truly game changer in trade: Traders overlooked Commerce and Industry Minister Piyush Goyal's statement that the India-UK Free Trade Agreement (FTA) is truly a game changer in trade, investment and services sectors.

Govt to come up with norms for 27% ethanol blending in petrol: Traders took note of Union Minister Nitin Gadkari has said that the government will come up with norms for 27 per cent ethanol blending in petrol by the end of August.

Global front: European markets were trading mostly in red, as investors waited for the latest updates on EU-U.S. trade talks ahead of the August 1 deadline. Asian markets ended mostly in red, as US President Donald Trump has now reworded his threat stating that imports into the US could face tariffs ranging from 15 to 50 per cent for countries that fail to sign a suitable deal past the August 1 deadline.

# MARKET SELFIE



## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	81463.09	-721.08	-0.88
NIFTY	24837	-225.10	-0.90
MIDCAP	4978.04	-680.40	-1.46
SMLCAP	53906.46	-1033.54	-1.88
BSEFMC	20170.15	-192.74	-0.95
HEALTHCARE	45338.67	91.74	0.20
AUTO	53195	-694.40	-1.29
POWER	6707.61	-161.90	-2.36
REALTY	7374.78	-72.80	-0.98
BSE IT	35100.90	-588.05	-1.65
BANKEX	63043.13	-498.68	-0.78
OIL GAS	27028.50	-581.42	-2.11
METAL	31368.33	-524.52	-1.64
INDIA VIX	11.27	0.55	5.15

## ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	591	2353	188
BSE	1061	2969	124

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	7997	9602	(17)
NSE CASH	96123	93826	2
NSE F&O	196383	150746	30

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	21.93	3.43	1.37
SENSEX	23.32	4.33	1.21

# KEY NUMBERS TRACKER



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

FII-DII*	Buy	Sell	Net
DII	12307	10503	1803
FII	11445	14444	(2999)

Note: FPI & DII Figures are provisional

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

FII	Buy	Sell	Net
Ind. Futures	4404.49	6857.77	(2453)
Ind. Options	840960.21	843401.51	(2441)
Stk. Futures	24218.04	26749.75	(2532)
Stk. Options	31074.51	30501.49	573

## PUT-CALL RATIO

Index	Current	Previous
NIFTY	0.58	0.76
BANK NIFTY	0.67	0.84

## DOLLAR INDEX

Dollar Index	Current	Previous	% Change
DXY	97.67	97.38	0.31

## 10-YEARS G-SEC YIELD

Country	Current	Previous	% Change
INDIA	6.352	6.329	0.02
USA	4.386	4.419	-0.02

## KEY COMMODITIES TRACKER (in \$)

Commodity	Current	Change Points	% Change
Gold	3336.22	-33.20	-0.99
Silver	38.14	-0.93	-2.39
Crude-Oil	65.03	-1.11	-1.69
Brent-Crude	68.33	-0.97	-1.40

# CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES				
Expiry		Close	Change Points	% Change
29 JULY-25	USD-INR	86.57	0.15	0.17
29 JULY-25	EUR-INR	101.41	-0.14	-0.14
29 JULY-25	GBP-INR	116.42	-0.59	-0.50
29 JULY-25	JPY- INR	58.61	-0.15	-0.26

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS						
Index	Close	S2	S1	Pivot	R1	R2
NIFTY	24837	24681	24759	24885	24963	25089
SENSEX	81463	80972	81217	81643	81889	82315
NIFTY FUTURES	24850	24709	24780	24902	24973	25095
BANK NIFTY	56529	55982	56255	56713	56987	57444
CNX IT	35624	35069	35347	35809	36086	36548
CNX MIDCAP	58009	57285	57647	58270	58632	59255
CNX SMALLCAP	18294	18017	18156	18410	18548	18802
INDIA VIX	11.28	10.19	10.73	11.16	11.70	12.13

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

SECURITIES BAN IN F&O TRADES FOR 25-07-2025
RBLBANK



# TECHNICAL VIEWS



## NIFTY

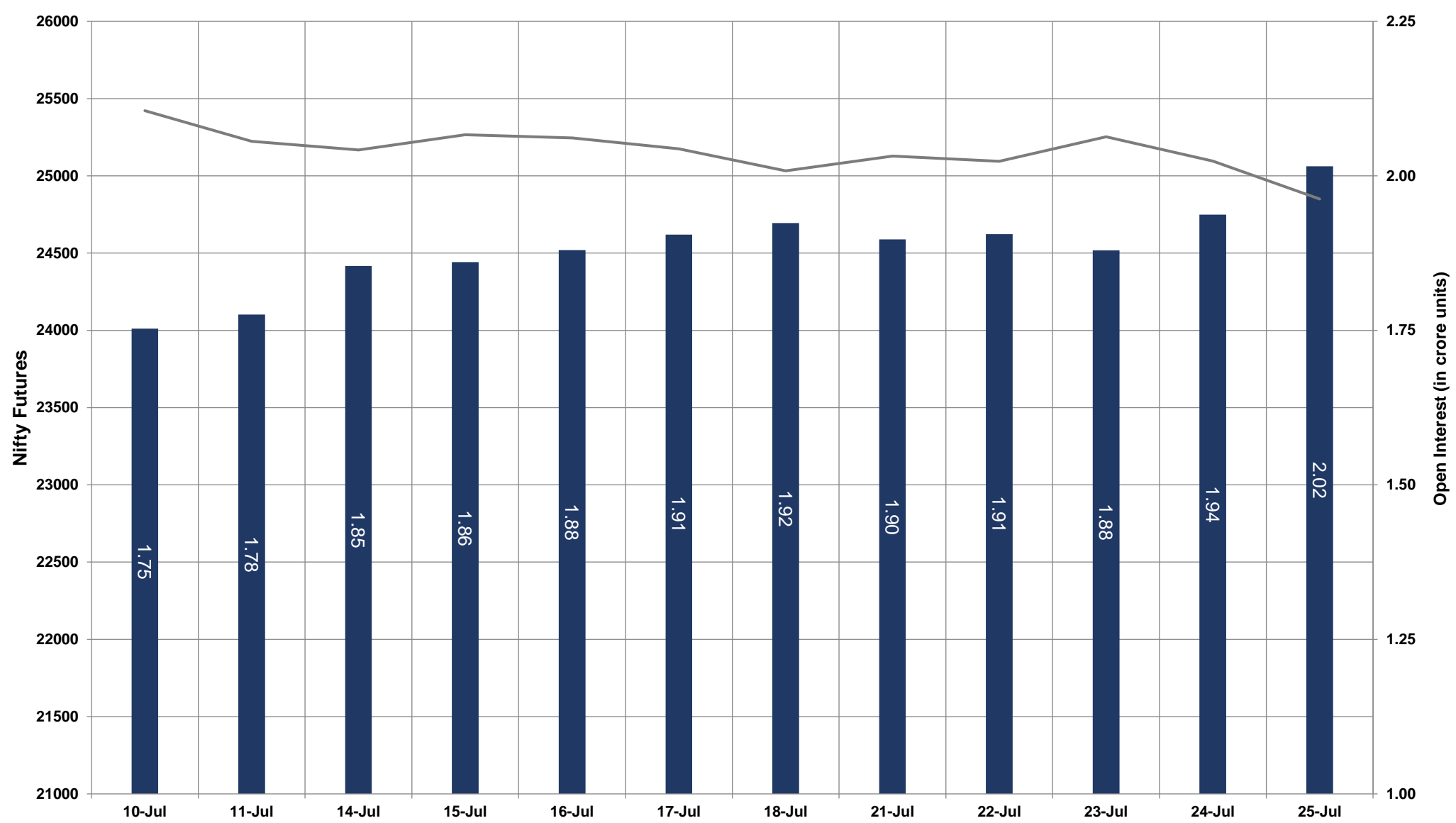


- Nifty Cash = **24837 (0.90%)**
- Resistance levels = **25000** and **25150**
- Support levels = **24730** and **24680**

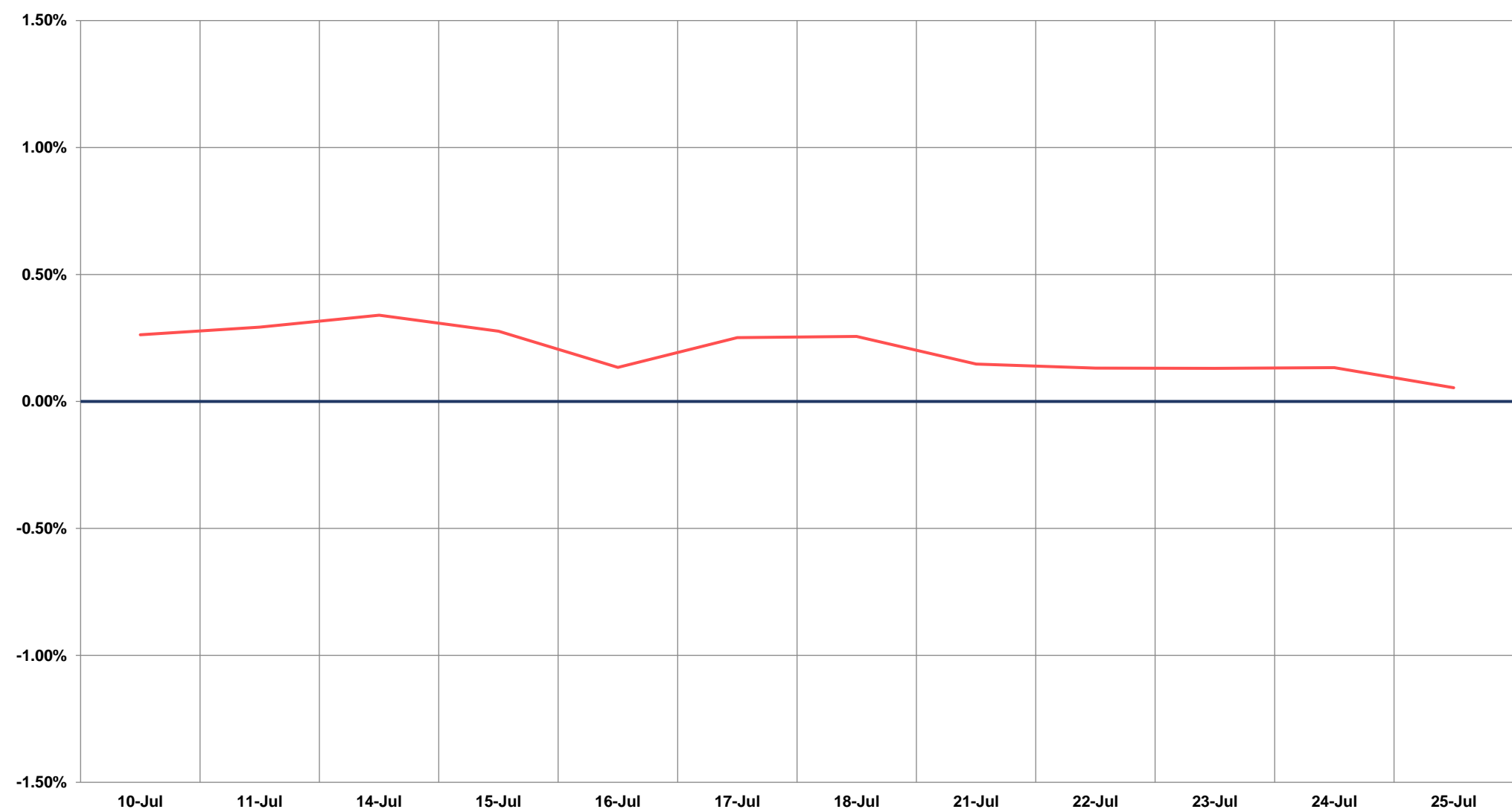
# TECHNICAL VIEWS



## NIFTY FUTURES



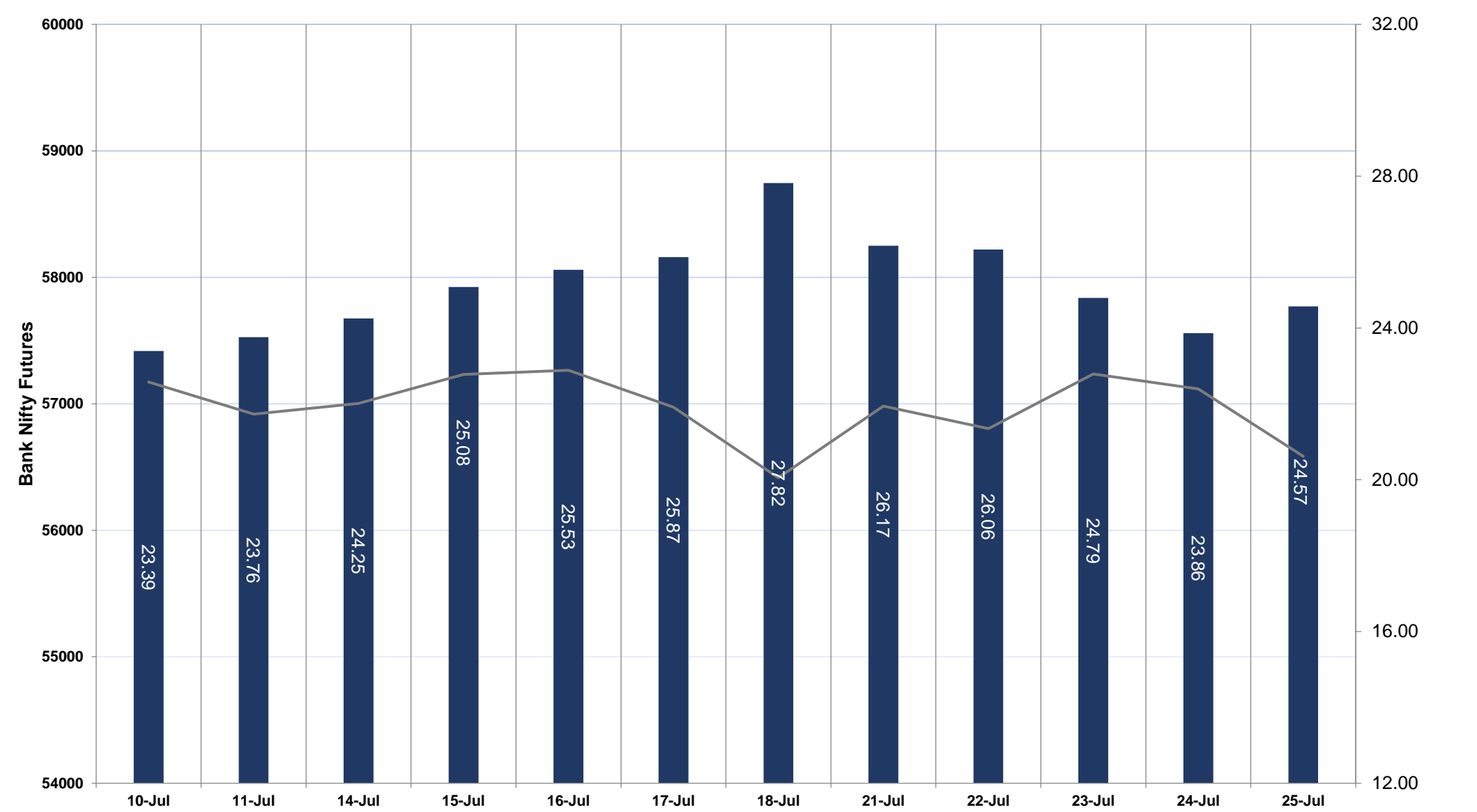
## SPREAD: FUTURE & SPOT



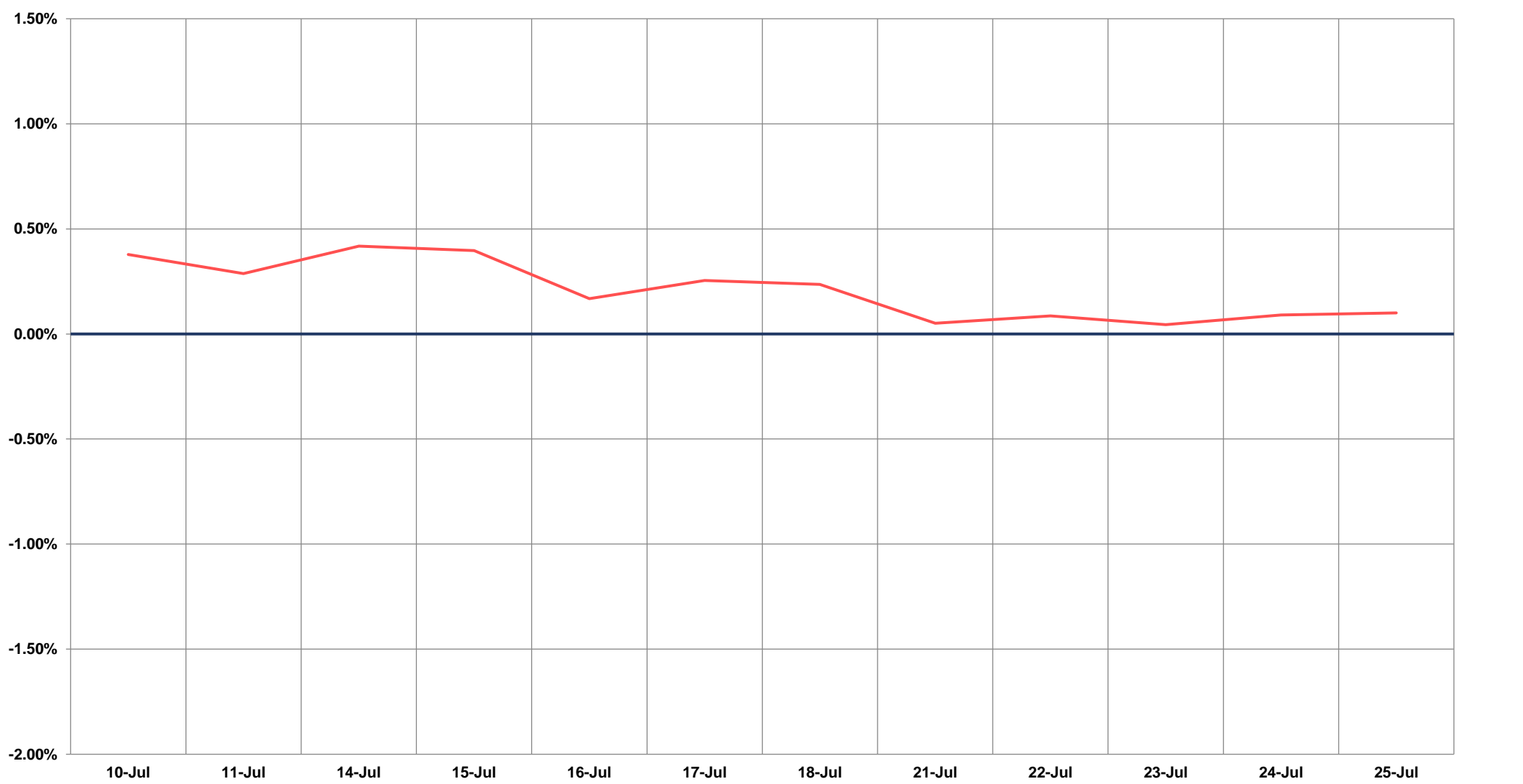
# TECHNICAL VIEWS



## BANK NIFTY FUTURES



## SPREAD: FUTURE & SPOT

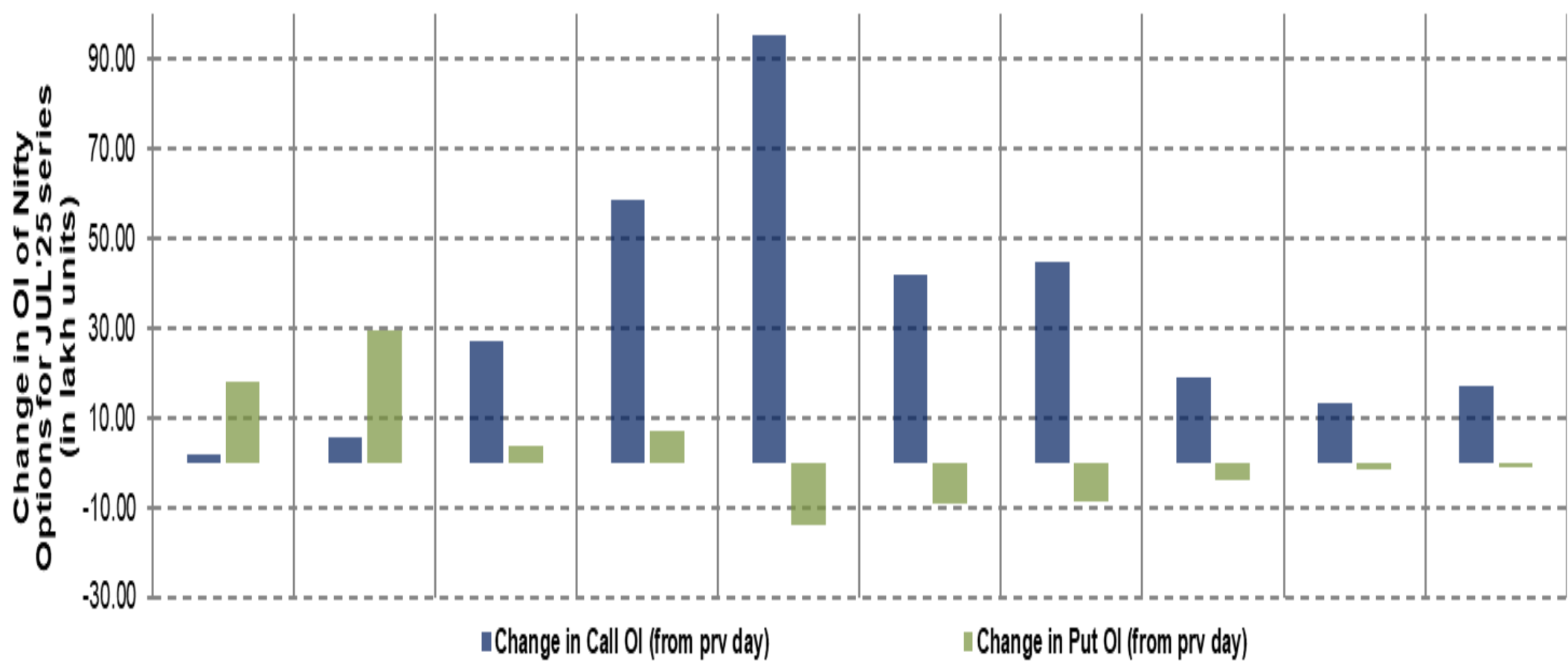
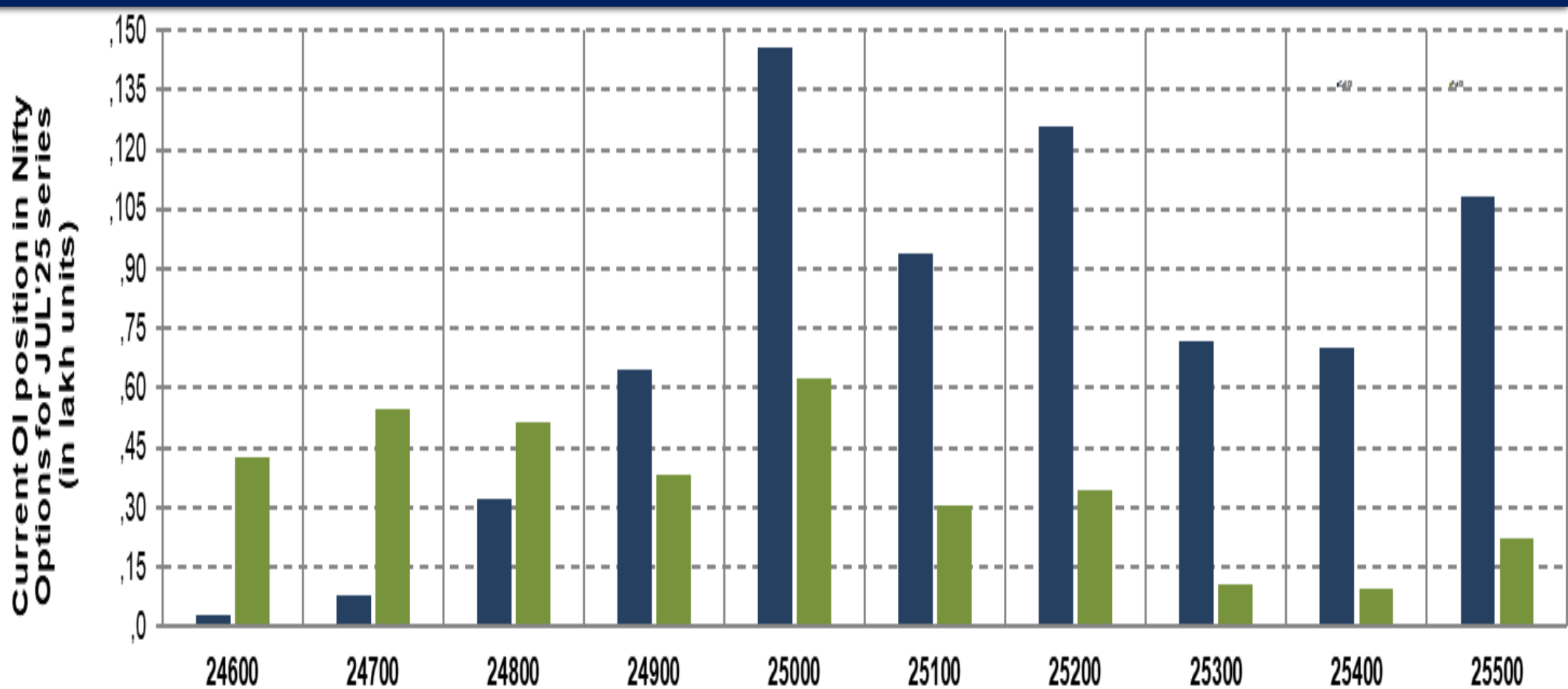




# TECHNICAL VIEWS



## NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 9.54 million in Open Interests is **Strike Price of 25000**
- **Most Active Nifty Put** with a addition of 2.95 millions in Open Interests is **Strike Price of 24700**
- **Maximum Open Interest an outstanding** was 14.54 millions for Calls at **Strike Price of 25000**
- **Maximum Open Interest an outstanding** was 6.27 millions for puts at **Strike Price of 25000**

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