



# MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

July 28, 2025



Indian equity benchmarks extended their losses for third straight session on Monday, with both the Nifty and Sensex closing over half percent cut, amid selling across sectors particularly in IT. Markets made a cautious start and traded near the neutral lines, as traders remained cautious ahead of the US tariff deadline set to take effect later this week. During the afternoon session, indices extended their losses and settled near day's low points.

Some of the important factors in today's trade:

India's forex kitty drops by \$1.18 billion to \$695.48 billion: Traders were concerned as the RBI said that India's forex kitty declined by \$1.18 billion to \$695.48 billion during the week ended July 18, 2025.

FII's sell stocks worth Rs 1,979.96 crore: Continued foreign fund outflows also dampened sentiments in the domestic markets. Foreign Institutional Investors (FIIs) sold stocks worth of Rs 1,979.96 crore on Friday.

Talks with US on proposed trade agreement progressing fast: Investors overlooked Commerce and Industry Minister Piyush Goyal's statement that talks with the US on the proposed trade agreement are progressing fast, adding that negotiations for a free trade agreement with Oman are almost finalised.

Global front: European markets were trading in green, while Asian markets ended mostly higher, as the EU and the U.S. struck a last-minute trade agreement and reports suggested the U.S. and China are likely to extend their tariff truce for another 90 days.

# MARKET SELFIE



## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	80891.02	-572.07	-0.70
NIFTY	24680.90	-156.10	-0.63
MIDCAP	45644.56	-333.48	-0.73
SMLCAP	53202.37	-704.09	-1.31
BSEFMC	20194.61	24.46	0.12
HEALTHCARE	45315.94	-22.73	-0.05
AUTO	52943.93	-251.07	-0.47
POWER	6686.01	-21.60	-0.32
REALTY	7071.69	-303.09	-4.11
BSE IT	34853.37	-247.53	-0.71
BANKEX	62194.18	-848.95	-1.35
OIL GAS	26957.97	-70.53	-0.26
METAL	31035.34	-332.99	-1.06
INDIA VIX	12.06	0.7875	6.98

## ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	807	2206	72
BSE	1200	2951	148

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	7561	7997	(5)
NSE CASH	92170	96123	(4)
NSE F&O	373061	196383	90

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	21.78	3.41	1.39
SENSEX	23.15	4.30	1.22

# KEY NUMBERS TRACKER



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

FII-DII*	Buy	Sell	Net
DII	15433	8834	6599
FII	9561	15437	(5877)

Note: FPI & DII Figures are provisional

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

FII	Buy	Sell	Net
Ind. Futures	5341.71	6520.31	(1179)
Ind. Options	1038540.93	1046528.51	(7988)
Stk. Futures	142891.98	140768.32	2124
Stk. Options	33987.63	33638.43	349

## PUT-CALL RATIO

Index	Current	Previous
NIFTY	0.65	0.58
BANK NIFTY	0.69	0.67

## DOLLAR INDEX

Dollar Index	Current	Previous	% Change
DXY	98.30	97.65	0.70

## 10-YEARS G-SEC YIELD

Country	Current	Previous	% Change
INDIA	6.374	6.352	0.33
USA	4.415	4.386	0.66

## KEY COMMODITIES TRACKER (in \$)

Commodity	Current	Change Points	% Change
Gold	3313.43	-22.20	-0.68
Silver	38.00	-0.13	-0.35
Crude-Oil	66.78	1.75	2.68
Brent-Crude	70.06	1.73	2.53

# CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES			
Expiry	Close	Change Points	% Change
29 JULY-25 USD-INR	86.70	0.13	0.16
29 JULY-25 EUR-INR	101.03	-0.46	-0.45
29 JULY-25 GBP-INR	116.23	-0.28	-0.24
29 JULY-25 JPY- INR	58.62	0.01	0.02

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS						
Index	Close	S2	S1	Pivot	R1	R2
NIFTY	24681	24496	24589	24739	24831	24982
SENSEX	80891	80294	80593	81075	81373	81856
NIFTY FUTURES	24710	24510	24610	24768	24868	25025
BANK NIFTY	56085	55639	55862	56220	56443	56801
CNX IT	35370	34812	35091	35329	35608	35845
CNX MIDCAP	57519	56755	57137	57792	58174	58829
CNX SMALLCAP	18065	17811	17938	18163	18289	18514
INDIA VIX	12.06	9.63	10.84	11.54	12.75	13.45

INDEX TREND ANALYSIS			
Index	Daily	Weekly	Monthly
NIFTY	Sell	Neutral	Buy
SENSEX	Sell	Neutral	Buy
NIFTY FUTURES	Sell	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 29-07-2025
RBLBANK



# TECHNICAL VIEWS



## NIFTY

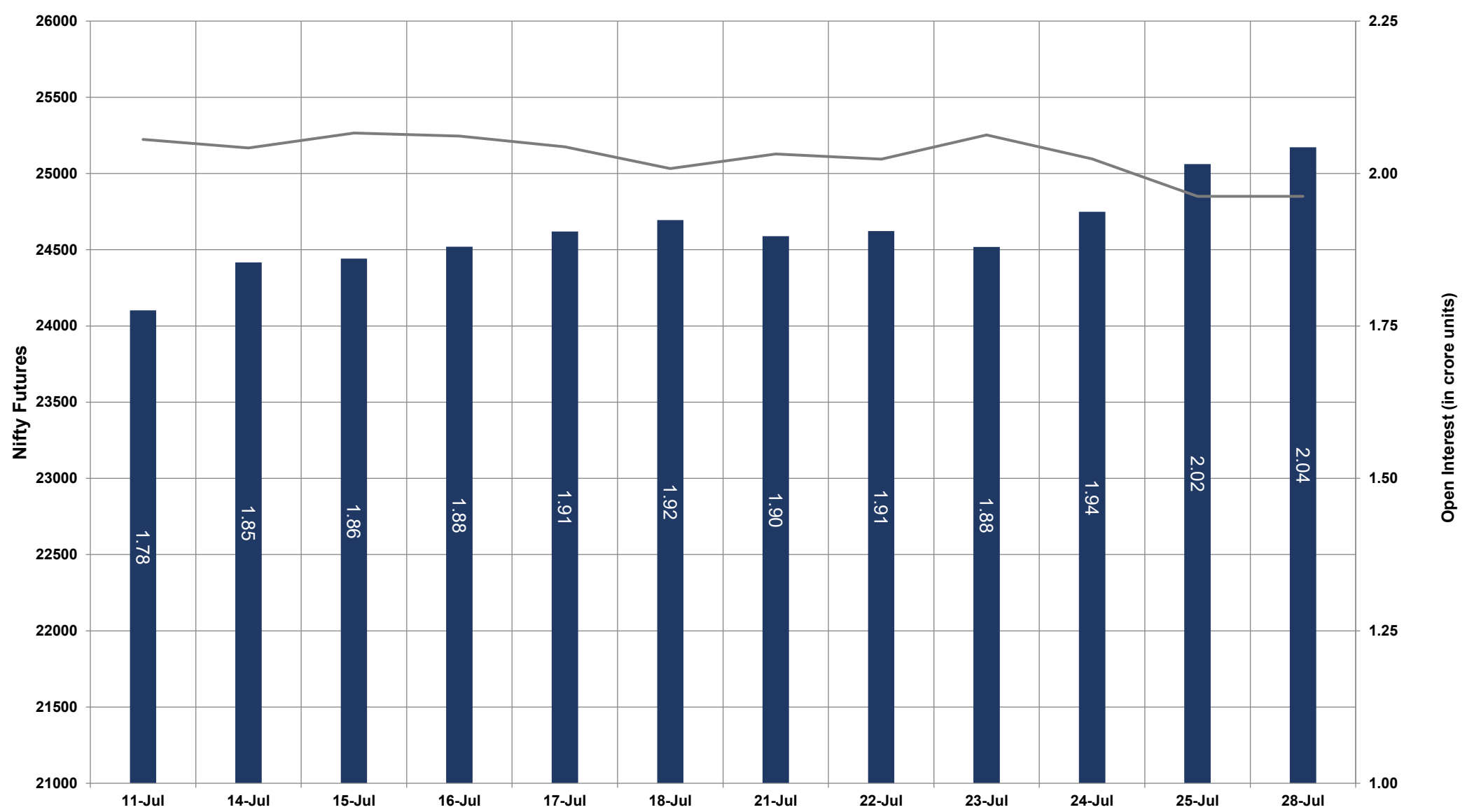


- Nifty Cash = **24680.90** (-0.63%)
- Resistance levels = **24730** and **24850**
- Support levels = **24580** and **24475**

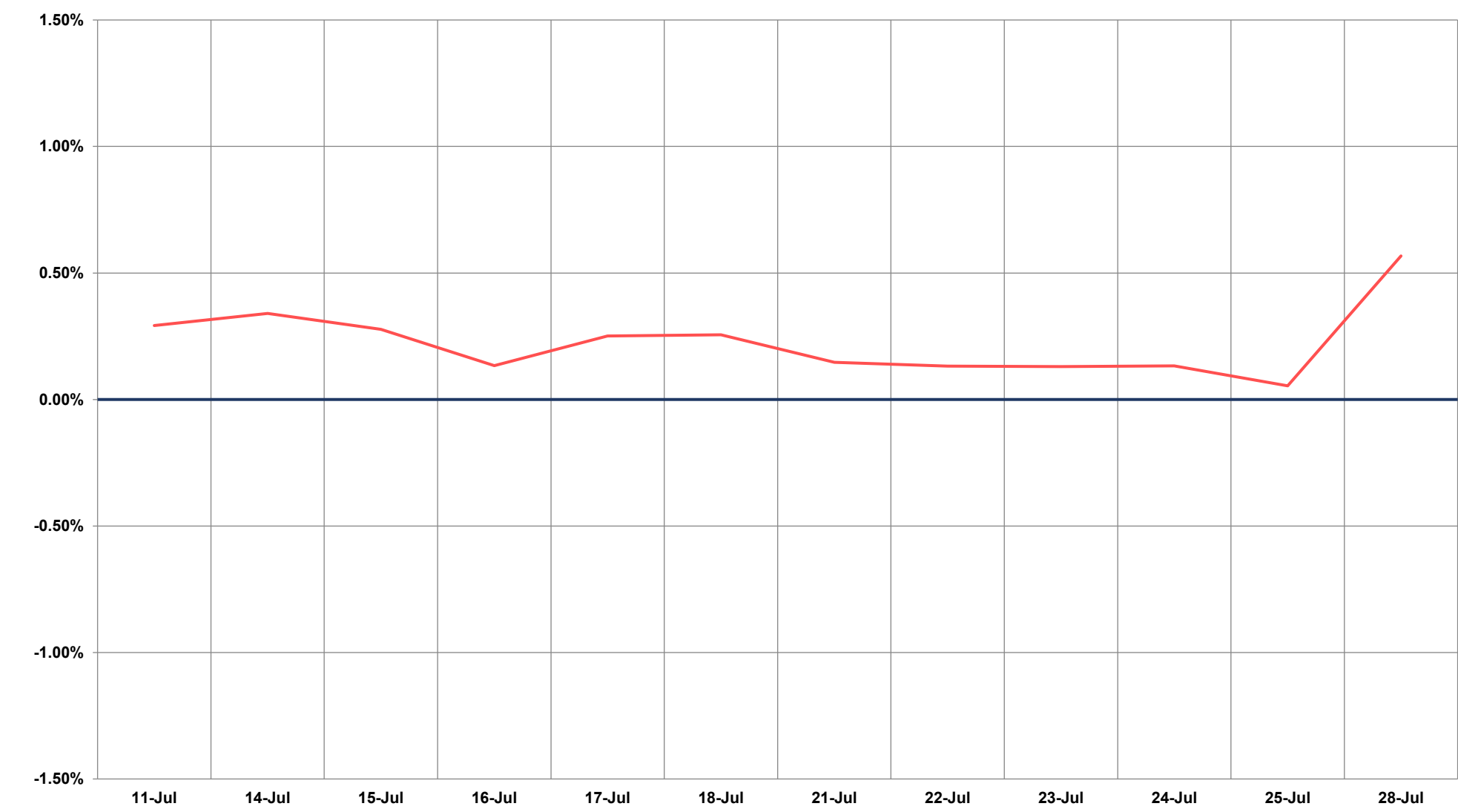
# TECHNICAL VIEWS



## NIFTY FUTURES



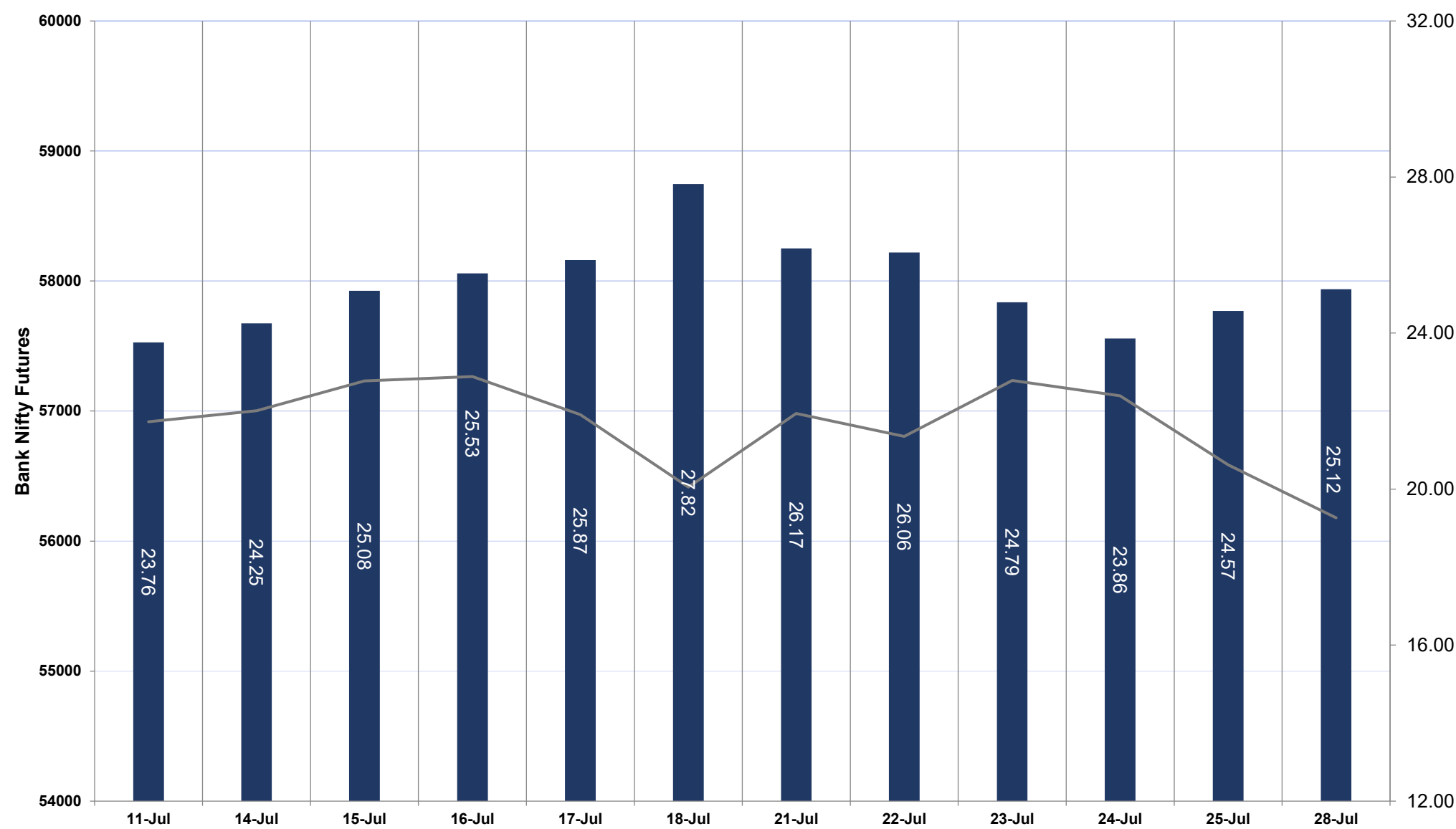
## SPREAD: FUTURE & SPOT



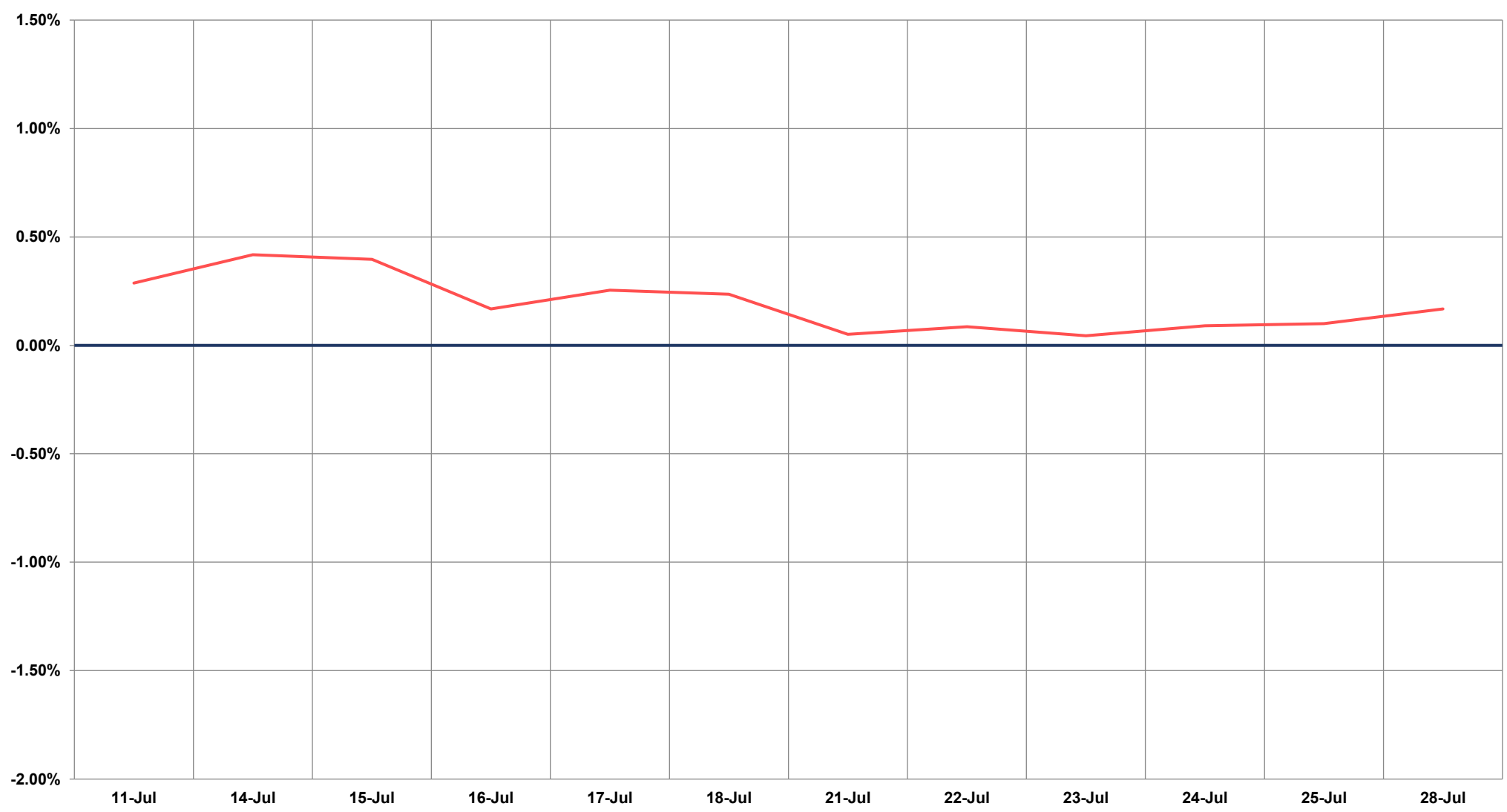
# TECHNICAL VIEWS



## BANK NIFTY FUTURES



## SPREAD: FUTURE & SPOT

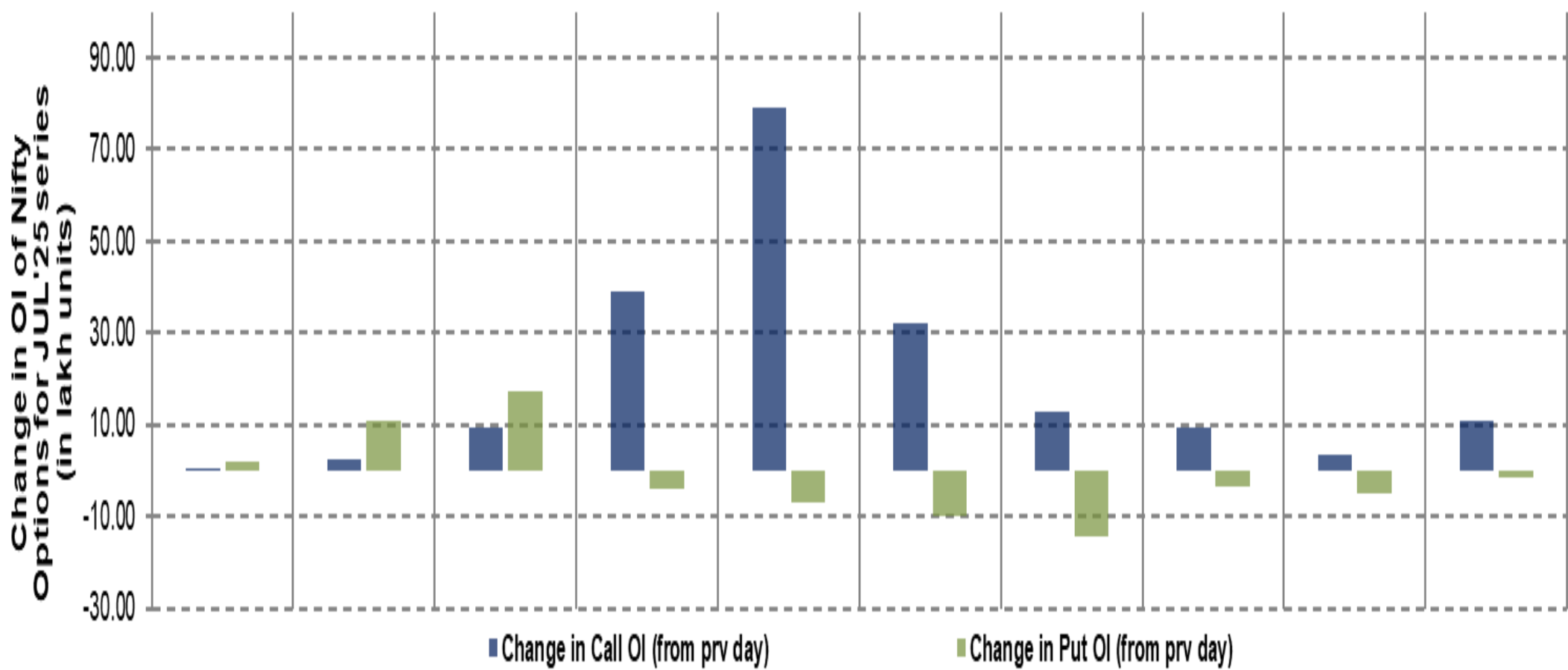
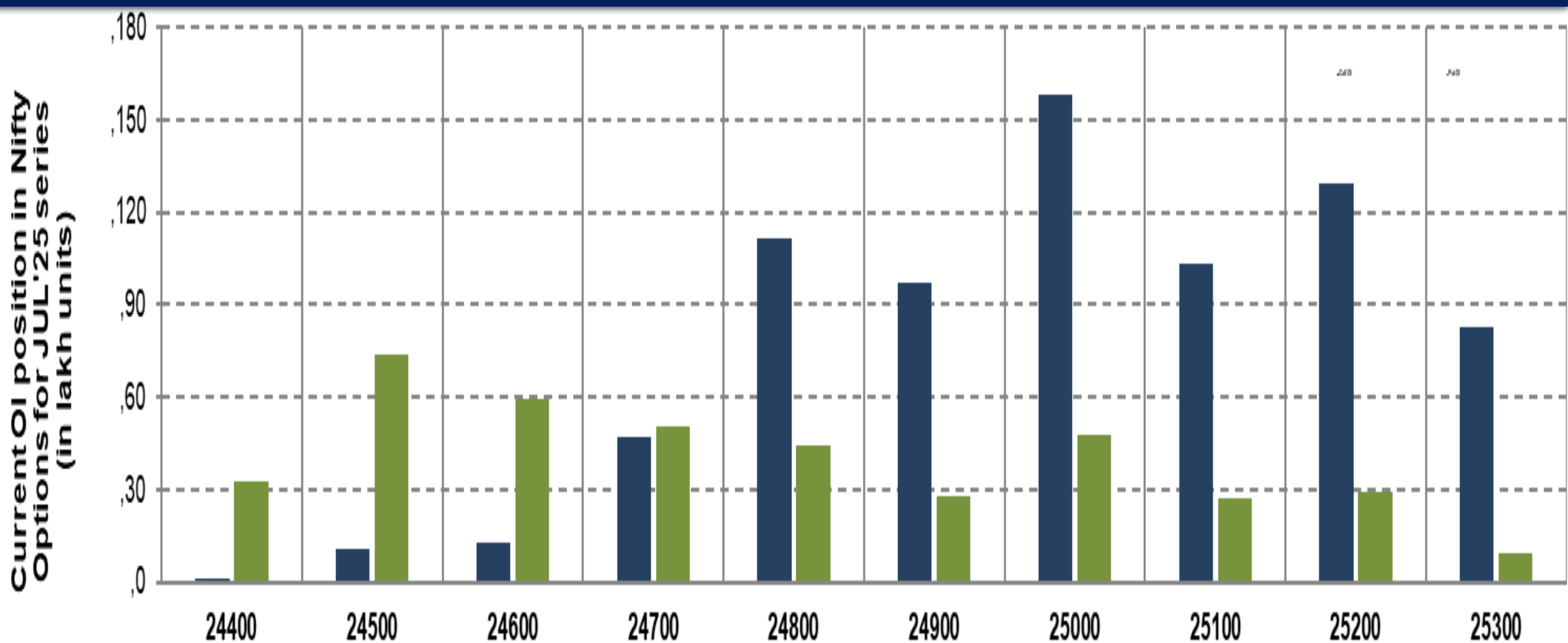




# TECHNICAL VIEWS



## NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 7.92 million in Open Interests is **Strike Price of 24800**
- **Most Active Nifty Put** with a addition of 1.71 millions in Open Interests is **Strike Price of 24600**
- **Maximum Open Interest an outstanding** was 15.83 millions for Calls at **Strike Price of 25000**
- **Maximum Open Interest an outstanding** was 7.41 millions for puts at **Strike Price of 24500**

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