



MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

July 29, 2025



Indian equity benchmarks snapped a three-day losing streak on Tuesday, with both the Nifty and Sensex closing near day's high points, supported by broad-based buying across sectors. Markets made a cautious start and hovered near the flat lines amid uncertainty surrounding the India-US trade deal and continued foreign fund outflows. However, in afternoon session, indices added gains and ended significantly higher.

Some of the important factors in today's trade:

Indian economy has look and feel of steady for FY26: Traders took some support with the finance ministry stating that despite concerns over slowing credit growth, Indian economy has the look and feel of 'steady as she goes' for the current fiscal.

Finance ministry sees room for more rate cuts as inflation remains below RBI's target: Sentiments were upbeat as finance ministry said that there is room for further easing of interest rate by the Reserve Bank of India (RBI) as the inflation is comfortably below the central bank's median target of 4 per cent.

India's Industrial output growth slows to 10-month low of 1.5% in June: Traders overlooked the government data showed that India's industrial production growth slowed to a 10-month low of 1.5 per cent in June 2025 due to poor performance of mining and power sectors, which were impacted by excess rains especially in second half of the month.

Global front: European markets were trading in green lifted by positive earnings reports and easing concerns over a potential trade war. Asian markets ended mixed as investors looked past the US-EU trade deal and awaited the outcome of ongoing U.S.-China talks in Stockholm.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	81337.95	446.93	0.55
NIFTY	24821.10	140.20	0.57
MIDCAP	46025.73	381.17	0.84
SMLCAP	53790.12	587.75	1.10
BSEFMC	20275.97	81.36	0.40
HEALTHCARE	45836.33	520.39	1.15
AUTO	53428.69	484.76	0.92
POWER	6738.39	52.38	0.78
REALTY	7187.47	115.78	1.64
BSE IT	34924.71	71.34	0.20
BANKEX	62270.90	76.72	0.12
OIL GAS	27213.56	255.59	0.95
METAL	31304.83	269.49	0.87
INDIA VIX	11.53	-0.54	-4.46

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1932	1025	92
BSE	2427	1587	143

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	7016	7561	(7)
NSE CASH	94795	92170	3
NSE F&O	385128	373061	3

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	21.97	3.43	1.38
SENSEX	23.28	4.33	1.21

KEY NUMBERS TRACKER



FII – DII ACTIVITY IN CASH SEGMENT (₹ in Crs)			
FII-DII*	Buy	Sell	Net
DII	15805	9777	6027
FII	11054	15631	(4577)

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)			
FII	Buy	Sell	Net
Ind. Futures	9656.78	10774.07	(1117)
Ind. Options	893066.36	891215.74	1851
Stk. Futures	135578.23	132371.23	3207
Stk. Options	27372.67	27005.34	367

PUT-CALL RATIO		
Index	Current	Previous
NIFTY	0.80	0.65
BANK NIFTY	0.70	0.69

DOLLAR INDEX			
Dollar Index	Current	Previous	% Change
DXY	98.93	98.63	0.30

10-YEARS G-SEC YIELD			
Country	Current	Previous	% Change
INDIA	6.369	6.374	-0.06
USA	4.327	4.415	-2.59

KEY COMMODITIES TRACKER (in \$)			
Commodity	Current	Change Points	% Change
Gold	3328.62	15.84	0.49
Silver	38.19	0.01	0.03
Crude-Oil	69.43	2.51	3.74
Brent-Crude	72.76	2.49	3.54

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES				
Expiry		Close	Change Points	% Change
29 JULY-25	USD-INR	86.84	0.14	0.16
29 JULY-25	EUR-INR	100.26	-0.79	-0.78
29 JULY-25	GBP-INR	115.80	-0.54	-0.46
29 JULY-25	JPY- INR	58.51	-0.12	-0.20

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS						
Index	Close	S2	S1	Pivot	R1	R2
NIFTY	24821	24507	24664	24756	24913	25004
SENSEX	81338	80260	80799	81114	81653	81969
NIFTY FUTURES	24839	24547	24693	24776	24922	25005
BANK NIFTY	56222	55667	55945	56121	56398	56574
CNX IT	35373	34967	35170	35305	35508	35642
CNX MIDCAP	57985	57090	57537	57798	58246	58507
CNX SMALLCAP	18251	17836	18044	18159	18367	18482
INDIA VIX	11.52	10.84	11.18	11.74	12.08	12.64

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 30-07-2025
RBLBANK

TECHNICAL VIEWS



NIFTY

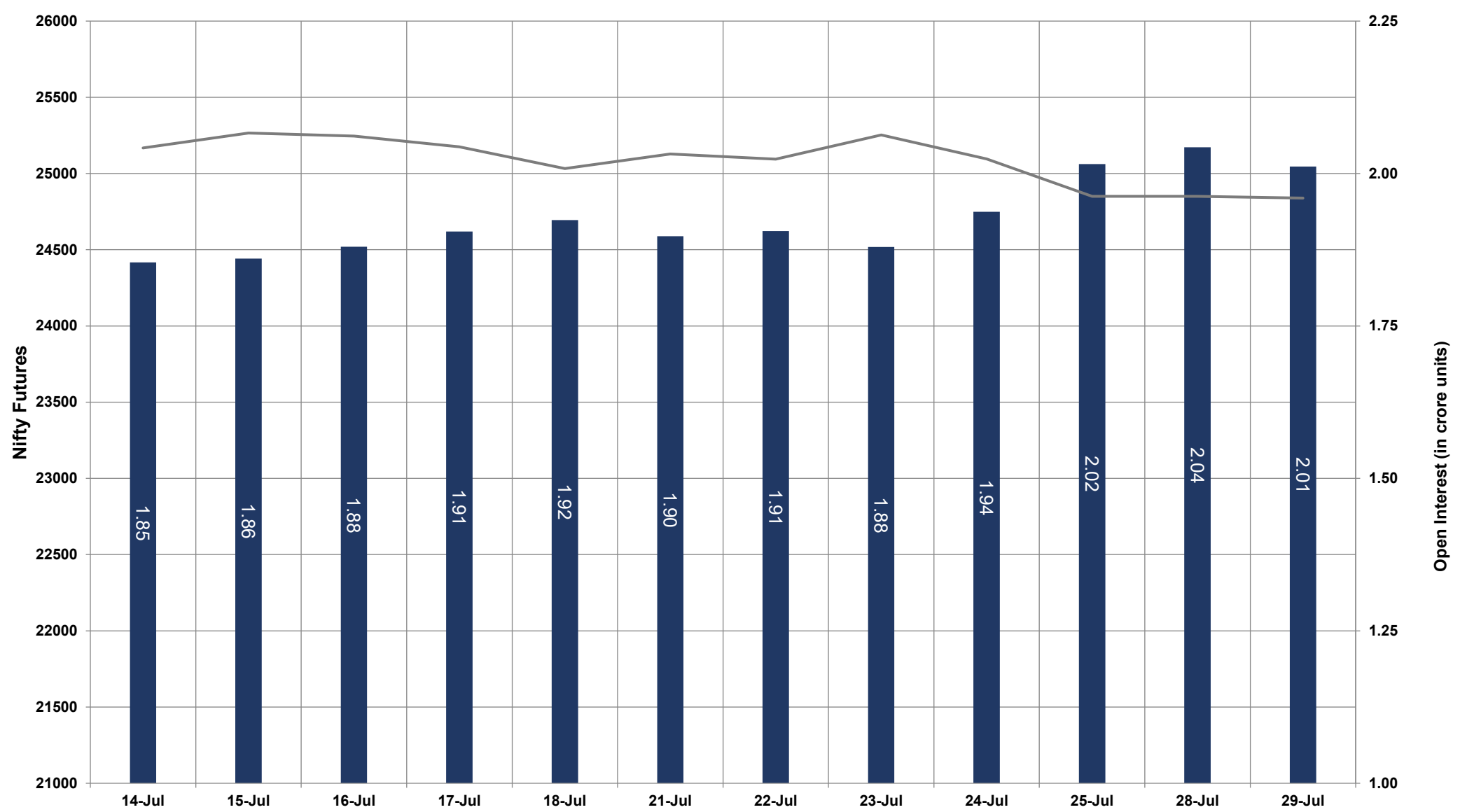


- Nifty Cash = **24821.10 (0.57%)**
- Resistance levels = **24885** and **25000**
- Support levels = **24730** and **24580**

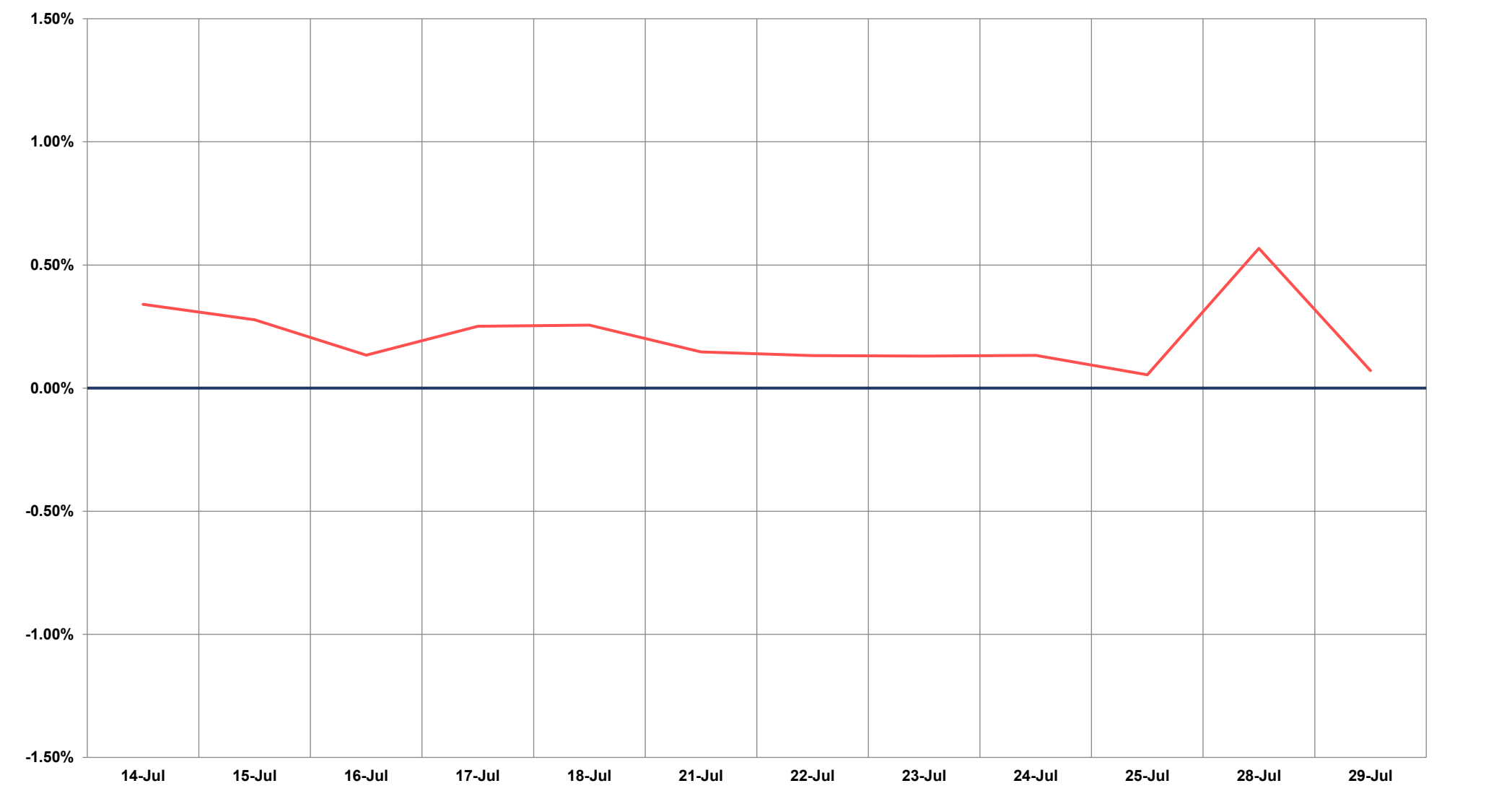
TECHNICAL VIEWS



NIFTY FUTURES



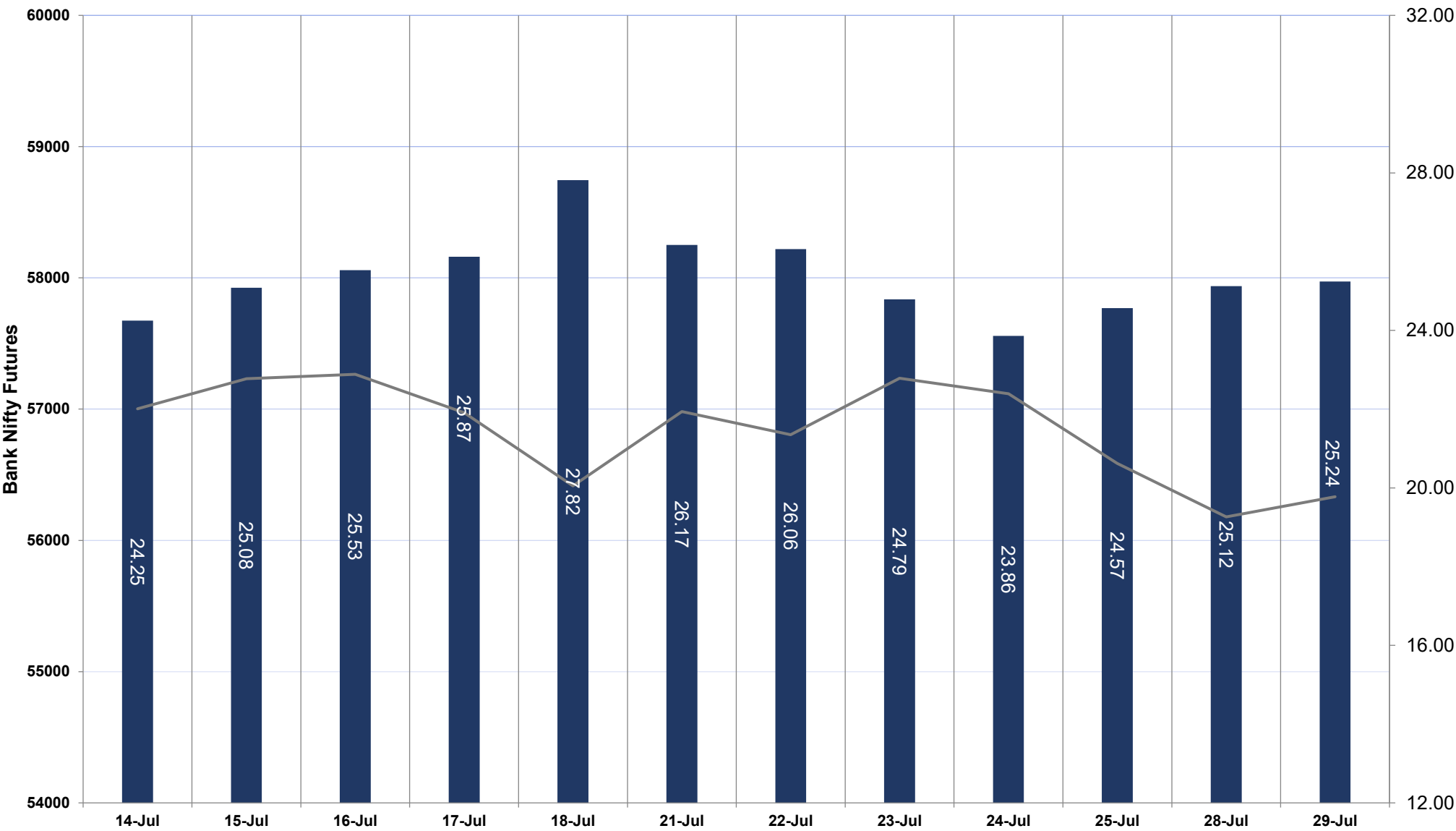
SPREAD: FUTURE & SPOT



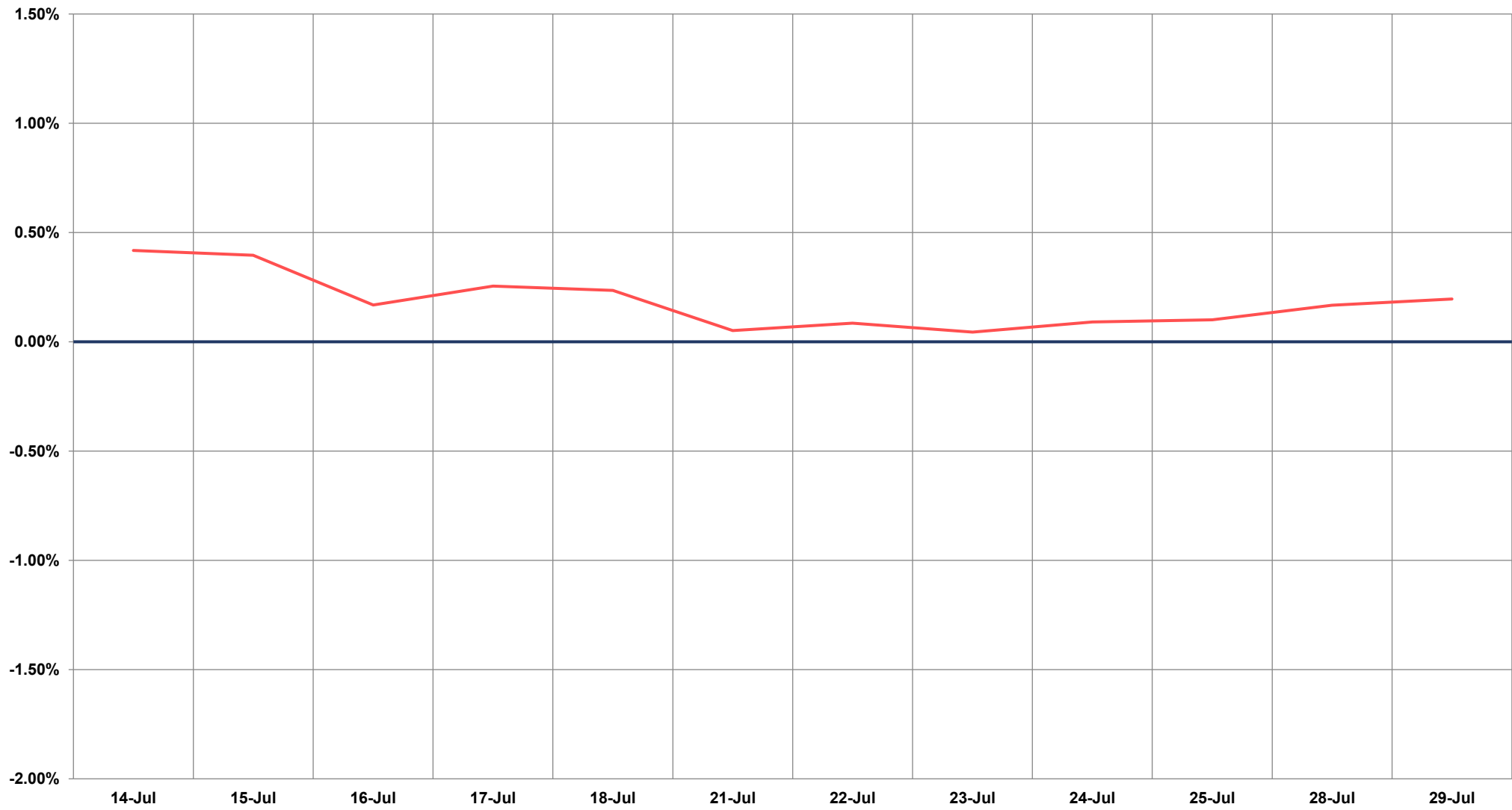
TECHNICAL VIEWS



BANK NIFTY FUTURES



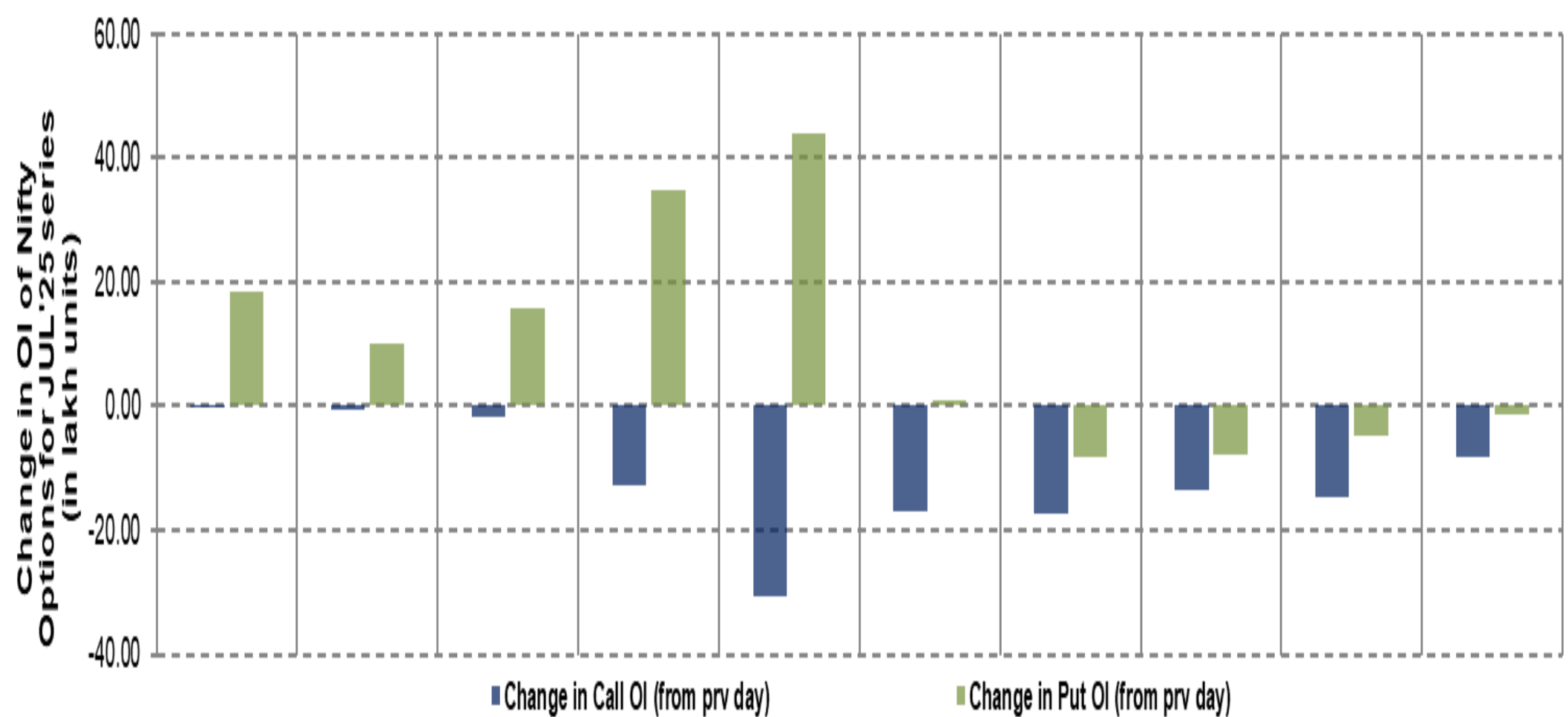
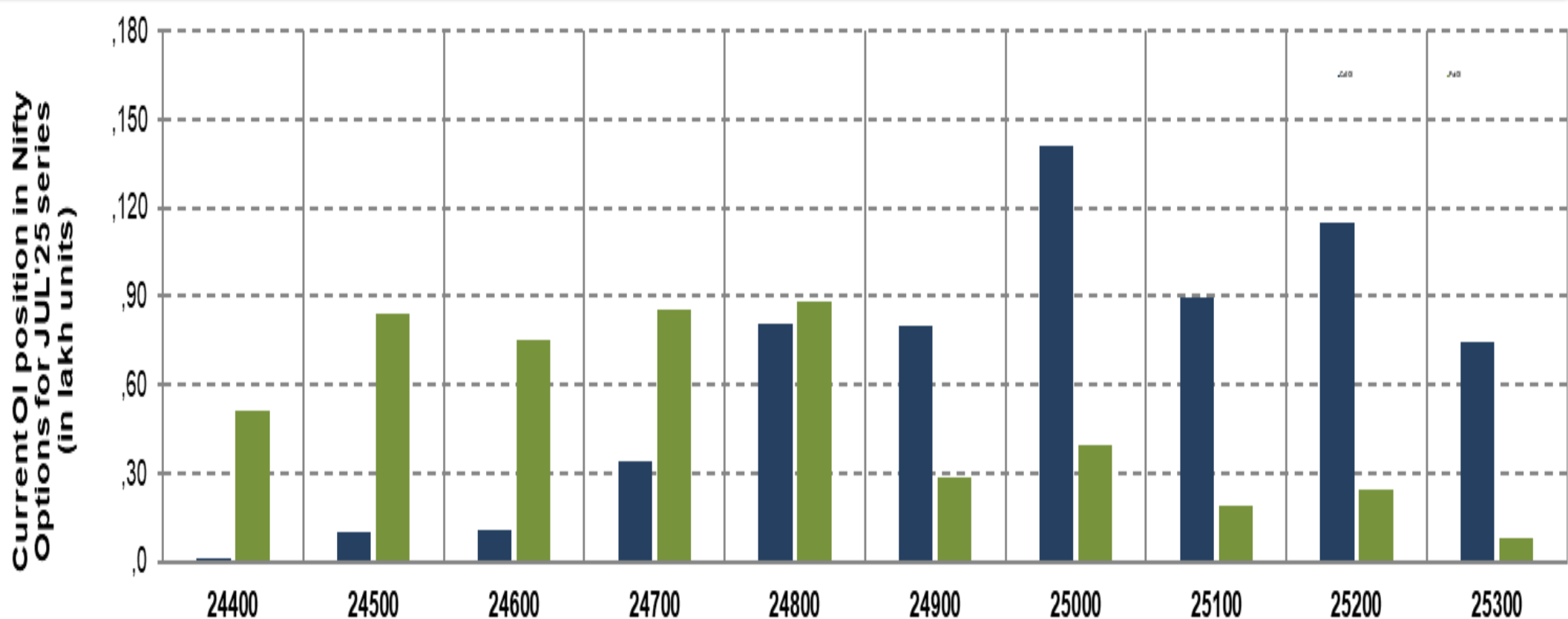
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an subtraction of 3.08 million in Open Interests is **Strike Price of 24800**
- **Most Active Nifty Put** with a addition of 4.39 millions in Open Interests is **Strike Price of 24800**
- **Maximum Open Interest an outstanding** was 14.10 millions for Calls at **Strike Price of 25000**
- **Maximum Open Interest an outstanding** was 8.83 millions for puts at **Strike Price of 24800**

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