



MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

July 31, 2025



Indian equity benchmarks ended with minor cut on Thursday. Market made a gap-down opening as traders remained cautious following U.S. President Donald Trump's announcement of a 25% tariff on Indian exports. However, in afternoon session, markets turned positive as traders preferred to buy stocks at lower levels. Finally, markets failed to sustain the gains and closed in negative territory.

Some of the important factors in today's trade:

US announces 25% tariff plus penalty on India from August 1: Traders were cautious as U.S. President Donald Trump announced plans to impose a 25% tariff on Indian imports from August 1.

FPIs extend selling streak: Sustained selling by foreign portfolio investors (FPIs) dented domestic markets. Foreign institutional investors (FIIs) extended their selling streak for the eighth consecutive session on July 30, offloading equities worth Rs 850 crore.

Trump's tariff may seem severe, but India not worse-off than nations that signed trade deal: Traders took note of Global Trade Research Initiative's (GTRI) statement that US President Donald Trump's announcement to impose a 25% tariff and penalty on Indian goods may seem severe but the country is not in a worse position than nations that signed trade deals with Washington.

Global front: European markets were trading mostly in green as investors digested a slew of earnings and reacted to a flurry of trade and tariff-related announcements from U.S. President Donald Trump on the eve of his Friday deadline. Asian markets ended mostly in red, as Bank of Japan maintained its interest rate on Thursday and lifted its inflation outlook citing the rise in food prices.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	81185.58	-296.28	-0.36
NIFTY	24768.35	-86.70	-0.35
MIDCAP	45781.65	-320.70	-0.70
SMLCAP	53425.29	-456.19	-0.85
BSEFMC	20567.26	234.28	1.15
HEALTHCARE	45372.03	-489.69	-1.07
AUTO	52901.32	-187.75	-0.35
POWER	6698.21	-41.38	-0.61
REALTY	7082.26	-34.19	-0.48
BSE IT	34808.58	-222.34	-0.63
BANKEX	62099.81	-130.66	-0.21
OIL GAS	26796.97	-399.71	-1.47
METAL	30885.69	-370.20	-1.18
INDIA VIX	11.54	0.33	3.01

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1043	1907	92
BSE	1525	2502	126

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	7302	6133	19
NSE CASH	102992	89523	15
NSE F&O	403265	350278	15

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	21.93	3.38	1.38
SENSEX	23.26	4.32	1.21

KEY NUMBERS TRACKER



FII – DII ACTIVITY IN CASH SEGMENT (₹ in Crs)			
FII-DII*	Buy	Sell	Net
DII	12608	10803	1805
FII	11666	12608	(942)

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)			
FII	Buy	Sell	Net
Ind. Futures	11485.90	12721.66	(1236)
Ind. Options	4652814.66	4644858.14	7957
Stk. Futures	39446.27	40976.34	(1530)
Stk. Options	14818.18	15591.10	(773)

PUT-CALL RATIO		
Index	Current	Previous
NIFTY	1.01	0.87
BANK NIFTY	0.91	0.69

DOLLAR INDEX			
Dollar Index	Current	Previous	% Change
DXY	100.02	99.82	0.21

10-YEARS G-SEC YIELD			
Country	Current	Previous	% Change
INDIA	6.376	6.365	0.17
USA	4.35	4.64	-0.64

KEY COMMODITIES TRACKER (in \$)			
Commodity	Current	Change Points	% Change
Gold	3307.49	22.50	0.69
Silver	36.64	-0.46	-1.30
Crude-Oil	69.34	-0.91	-1.34
Brent-Crude	71.75	-1.72	-2.37

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES				
Expiry		Close	Change Points	% Change
26 AUG-25	USD-INR	87.78	0.23	0.26
26 AUG-25	EUR-INR	100.55	-0.66	-0.65
26 AUG-25	GBP-INR	116.15	-0.99	-0.84
26 AUG-25	JPY- INR	59.00	-0.4	-0.67

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS						
Index	Close	S2	S1	Pivot	R1	R2
NIFTY	24768	24465	24617	24787	24938	25108
SENSEX	81186	80120	80653	81228	81761	82336
NIFTY FUTURES	24772	24444	24608	24789	24953	25134
BANK NIFTY	55962	55113	55537	55972	56396	56831
CNX IT	35302	34707	35004	35297	35594	35886
CNX MIDCAP	57401	56742	57072	57422	57751	58102
CNX SMALLCAP	17967	17730	17849	17986	18105	18242
INDIA VIX	11.54	10.70	11.12	11.62	12.04	12.54

INDEX TREND ANALYSIS			
Index	Daily	Weekly	Monthly
NIFTY	Sell	Neutral	Buy
SENSEX	Sell	Neutral	Buy
NIFTY FUTURES	Sell	Neutral	Buy
BANK NIFTY	Sell	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 01-08-2025
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TECHNICAL VIEWS



NIFTY

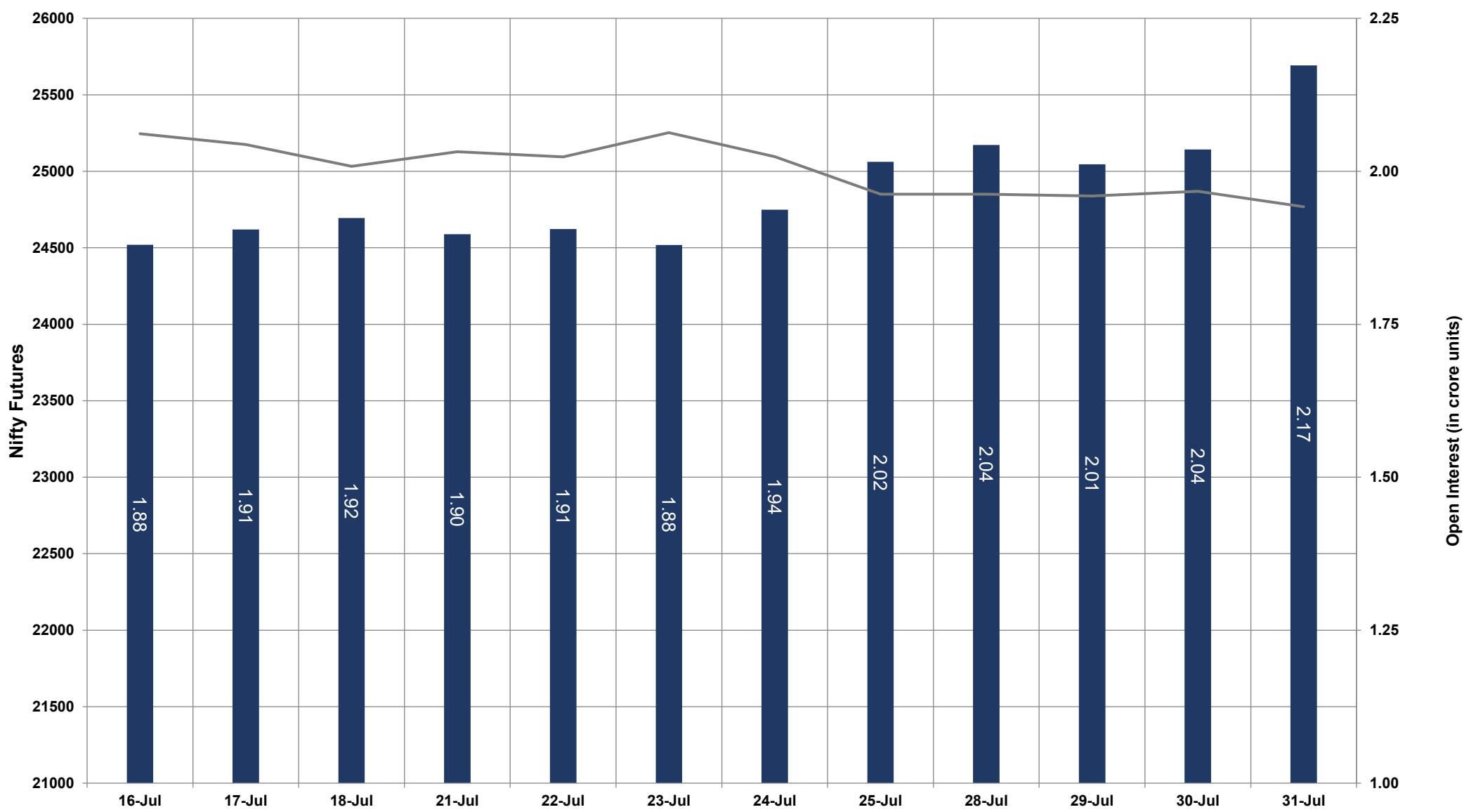


- Nifty Cash = **24768.35 (-0.35%)**
- Resistance levels = **24820** and **24930**
- Support levels = **24610** and **24480**

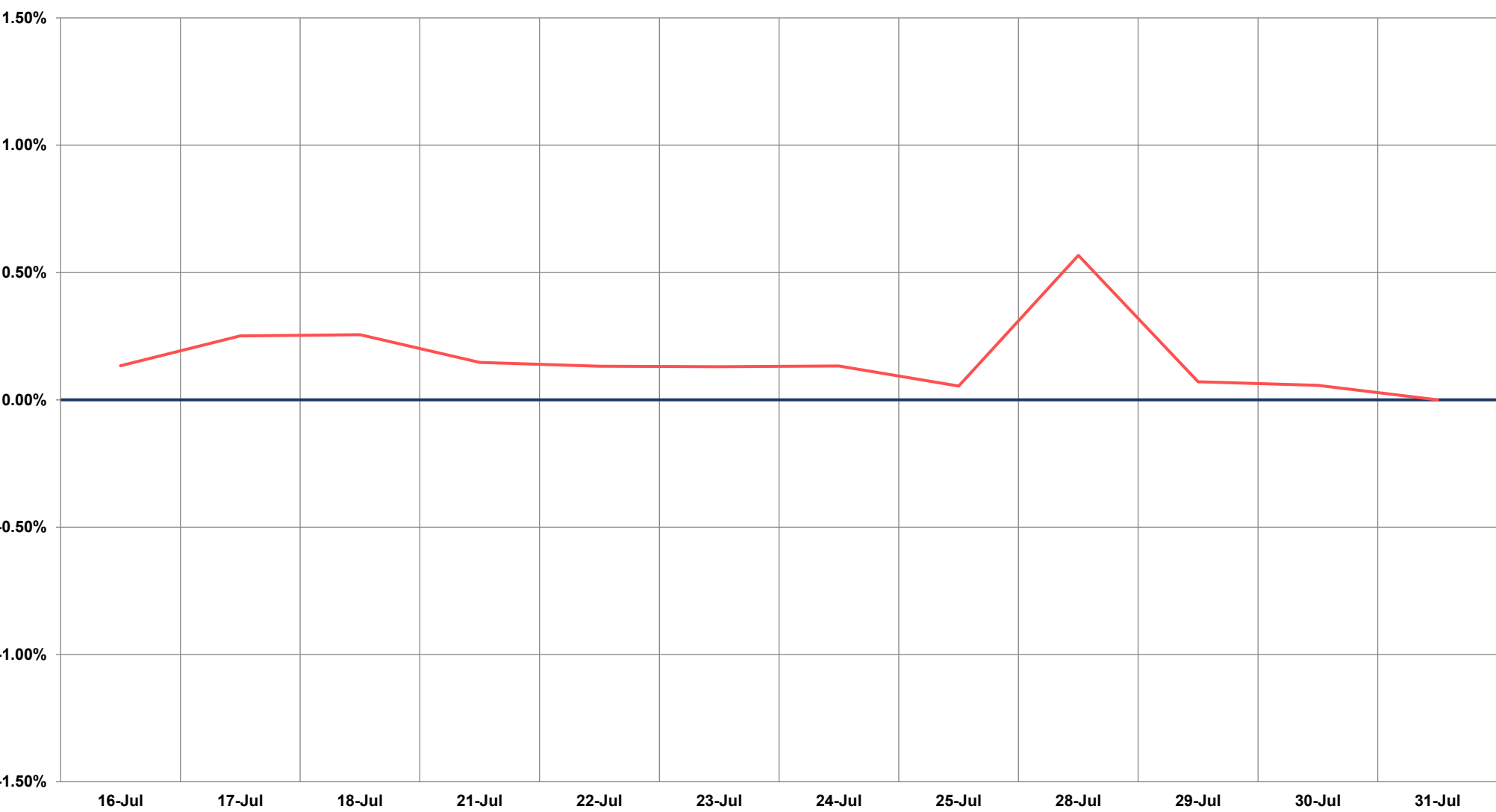
TECHNICAL VIEWS



NIFTY FUTURES



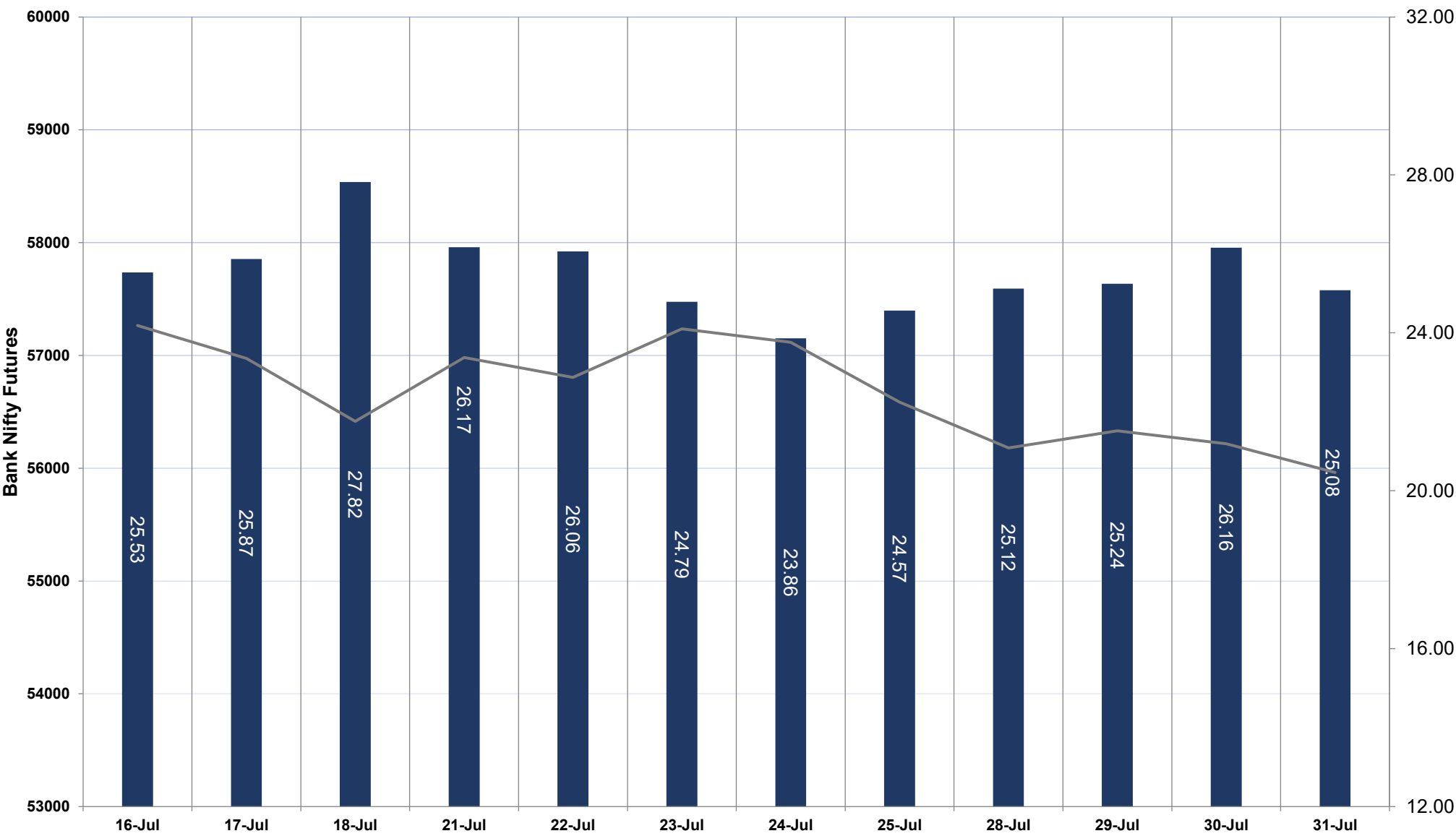
SPREAD: FUTURE & SPOT



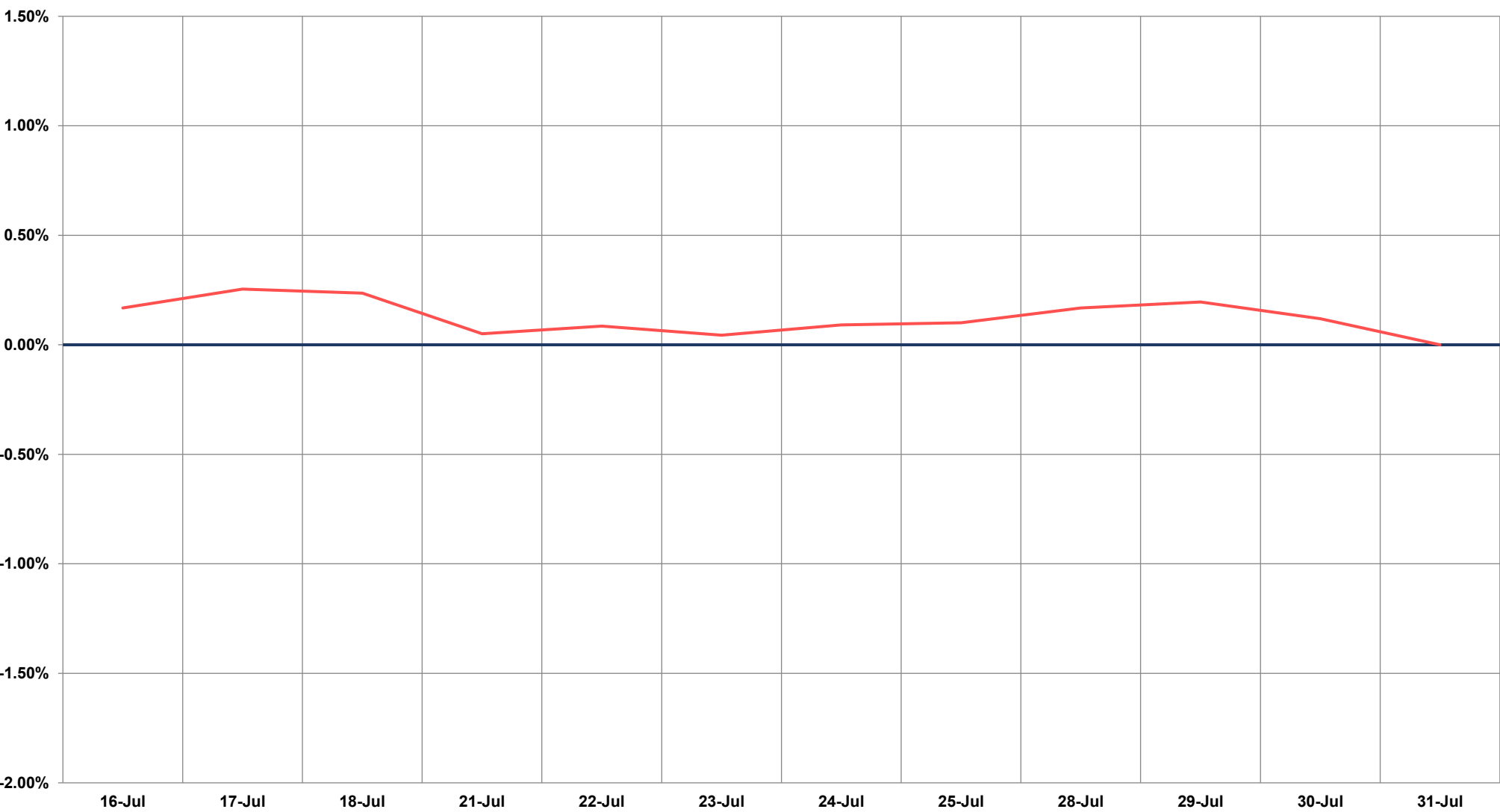
TECHNICAL VIEWS



BANK NIFTY FUTURES



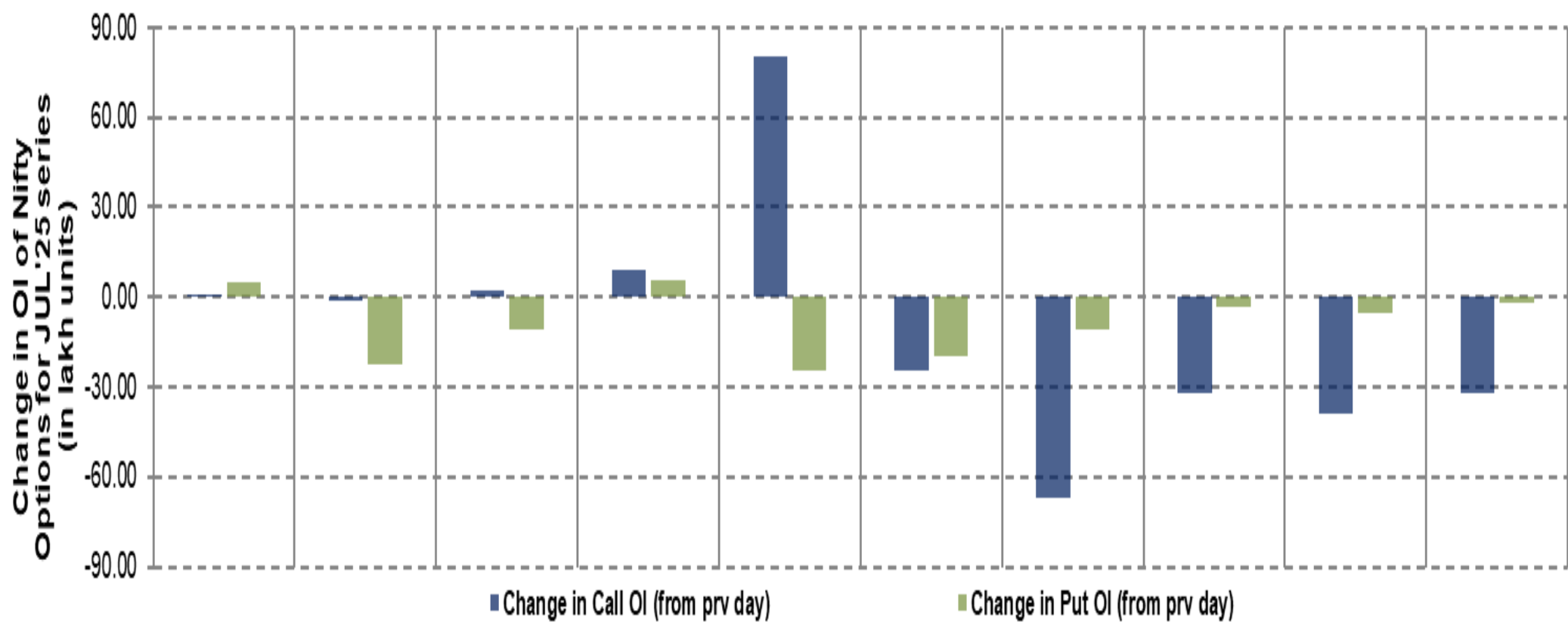
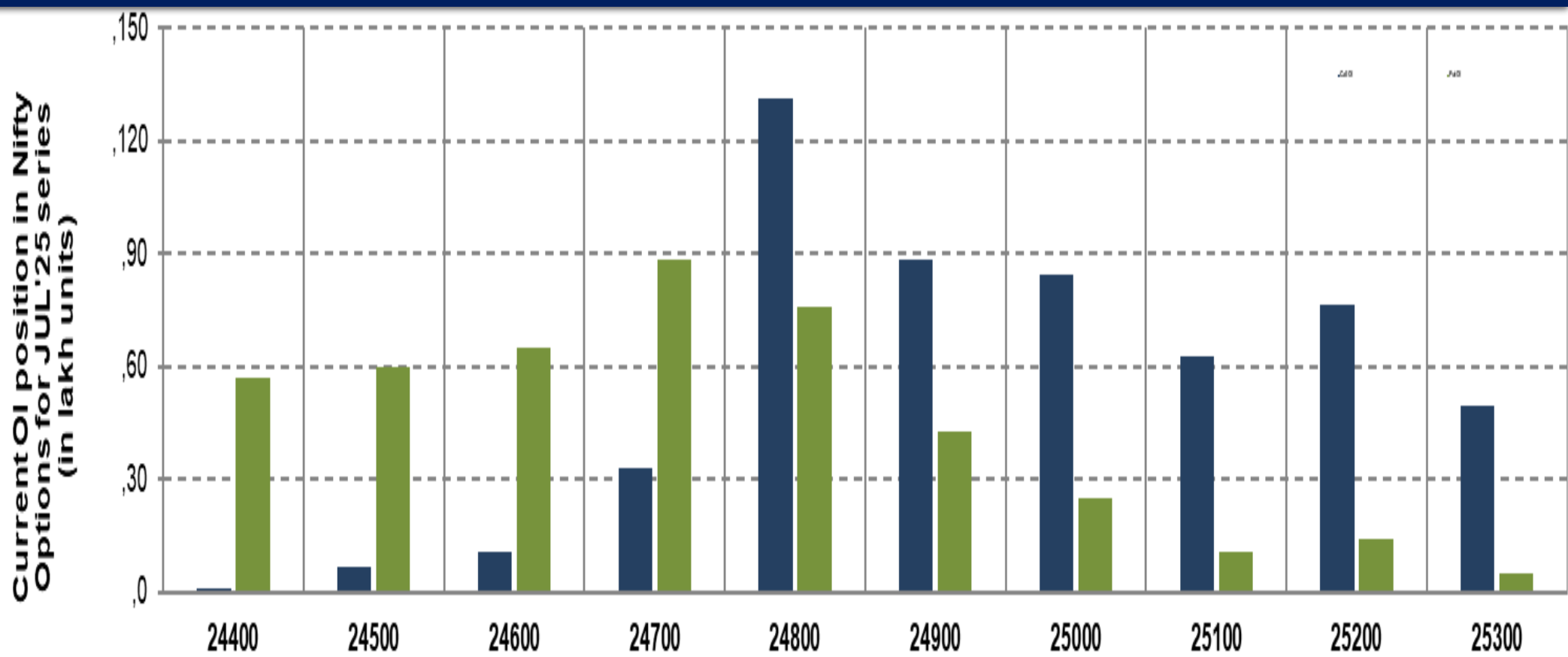
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 8.03 million in Open Interests is **Strike Price of 24800**
- **Most Active Nifty Put** with a subtraction of 2.45 millions in Open Interests is **Strike Price of 24900**
- **Maximum Open Interest** an outstanding was 13.13 millions for Calls at **Strike Price of 24800**
- **Maximum Open Interest** an outstanding was 8.86 millions for puts at **Strike Price of 24700**

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