



MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

Aug 01, 2025



Indian equity benchmarks extended their losses for the second consecutive day on Friday, as traders adopted a cautious stance following US President Donald Trump announced tariffs on various trading-partner countries, effective August 7. After making a cautious start, soon indices traded near neutral lines, as sentiments remained downbeat amid sustained foreign fund outflows. In last leg of trade, indices slipped into deep red and closed with significant losses.

Some of the important factors in today's trade:

Bank credit growth to industry slows to 5.5% in June: Some concern came with the Reserve Bank of India (RBI) data showing that the bank credit growth to industry slowed to 5.5 per cent in the fortnight ended June 26, 2025 as compared to 7.7 per cent in the year-ago period.

Fiscal deficit at 17.9% of full-year target at end of June: Traders took note of the Controller General of Accounts (CGA) data, which showed that the Centre's fiscal deficit stood at 17.9 per cent of the full-year target at the end of June.

India's manufacturing sector strengthens further in July with PMI at 59.1: Market participants overlooked report that the seasonally adjusted HSBC India Manufacturing Purchasing Managers' Index (PMI) surged to 59.1 in July from 58.4 in June, signaling the strongest improvement in the health of the sector since March 2024.

Global front: European markets were trading in red as investors assessed the potential economic impact of fresh U.S. levies on dozens of countries, including a 39 percent rate on Switzerland. Asian markets ended mostly in red, as private survey showed China's manufacturing activity returned to contractionary territory in July as a result of softening new business growth.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	80599.91	-585.67	-0.72
NIFTY	24565.35	-203.00	-0.82
MIDCAP	45155.19	-626.46	-1.37
SMLCAP	52575.33	-849.96	-1.59
BSEFMC	20656.60	89.34	0.43
HEALTHCARE	44265.55	-1106.48	-2.44
AUTO	52356.92	-544.40	-1.03
POWER	6668.03	-30.18	-0.45
REALTY	6955.96	-126.30	-1.78
BSE IT	34179.20	-629.38	-1.81
BANKEX	61806.01	-293.80	-0.47
OIL GAS	26283.87	-513.10	-1.91
METAL	30287.01	-598.68	-1.94
INDIA VIX	11.98	0.43	3.75

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	784	2172	83
BSE	1237	2796	136

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	7813	7302	7
NSE CASH	94819	102992	(8)
NSE F&O	157023	403265	(61)

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	21.70	3.35	1.41
SENSEX	22.69	4.29	1.23

KEY NUMBERS TRACKER



FII – DII ACTIVITY IN CASH SEGMENT (₹ in Crs)			
FII-DII*	Buy	Sell	Net
DII	14086	11367	2718
FII	9105	11927	(2821)

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)			
FII	Buy	Sell	Net
Ind. Futures	2100.74	5921.43	(3821)
Ind. Options	877466.61	881060.30	(3594)
Stk. Futures	18534.19	20370.22	(1836)
Stk. Options	17980.01	17937.86	42

PUT-CALL RATIO		
Index	Current	Previous
NIFTY	0.62	1.01
BANK NIFTY	0.93	0.91

DOLLAR INDEX			
Dollar Index	Current	Previous	% Change
DXY	98.69	99.97	-1.28

10-YEARS G-SEC YIELD			
Country	Current	Previous	% Change
INDIA	6.371	6.376	-0.08
USA	4.220	4.35	-3.21

KEY COMMODITIES TRACKER (in \$)			
Commodity	Current	Change Points	% Change
Gold	3362.64	74.10	2.25
Silver	37.02	0.36	0.99
Crude-Oil	67.53	-2.20	-3.17
Brent-Crude	69.43	-2.35	-3.28

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES				
Expiry		Close	Change Points	% Change
26 AUG-25	USD-INR	87.60	-0.16	-0.18
26 AUG-25	EUR-INR	100.23	-0.32	-0.32
26 AUG-25	GBP-INR	115.46	-0.70	-0.60
26 AUG-25	JPY- INR	58.50	-0.50	-0.85

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS						
Index	Close	S2	S1	Pivot	R1	R2
NIFTY	24565	24379	24472	24628	24721	24877
SENSEX	80600	79982	80291	80804	81113	81626
NIFTY FUTURES	24627	24441	24534	24695	24788	24948
BANK NIFTY	55618	55224	55421	55759	55956	56295
CNX IT	34650	34221	34436	34801	35015	35380
CNX MIDCAP	56637	55933	56285	56900	57253	57868
CNX SMALLCAP	17668	17433	17551	17759	17877	18085
INDIA VIX	11.98	11.12	11.55	11.83	12.26	12.54

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

SECURITIES BAN IN F&O TRADES FOR 04-08-2025
PNBHOUSING

TECHNICAL VIEWS



NIFTY

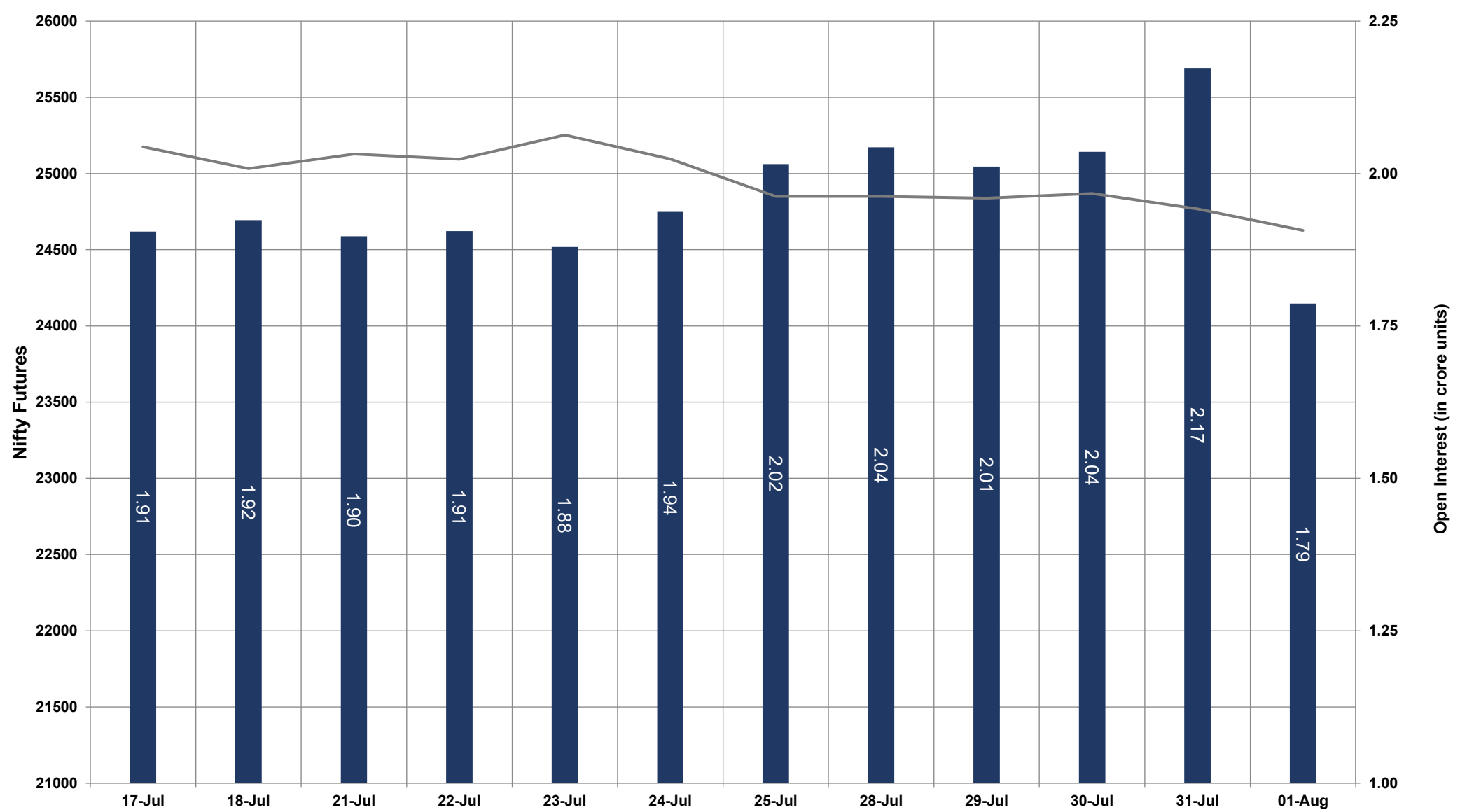


- Nifty Cash = **24565.35 (-0.82%)**
- Resistance levels = **24770** and **24850**
- Support levels = **24480** and **24350**

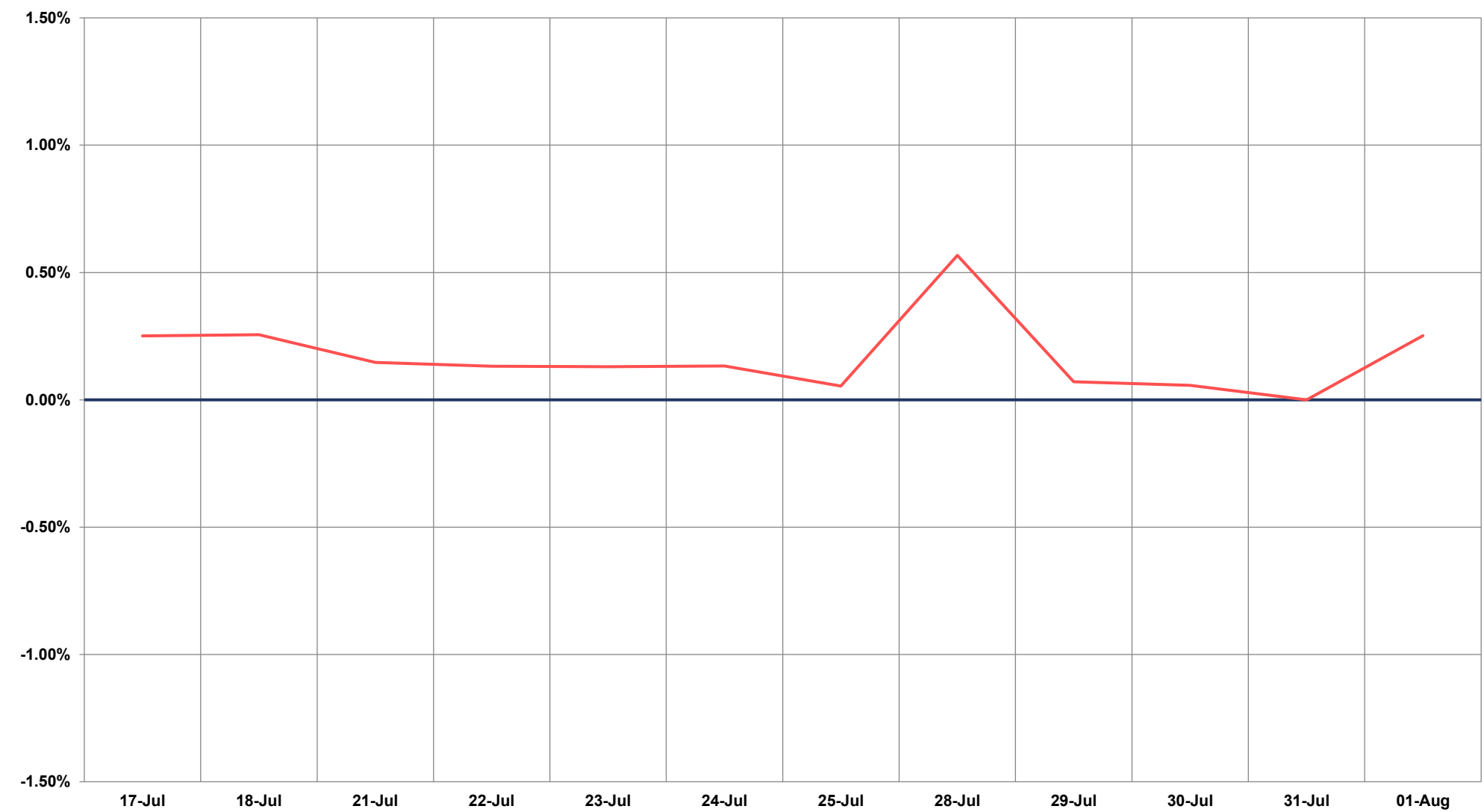
TECHNICAL VIEWS



NIFTY FUTURES



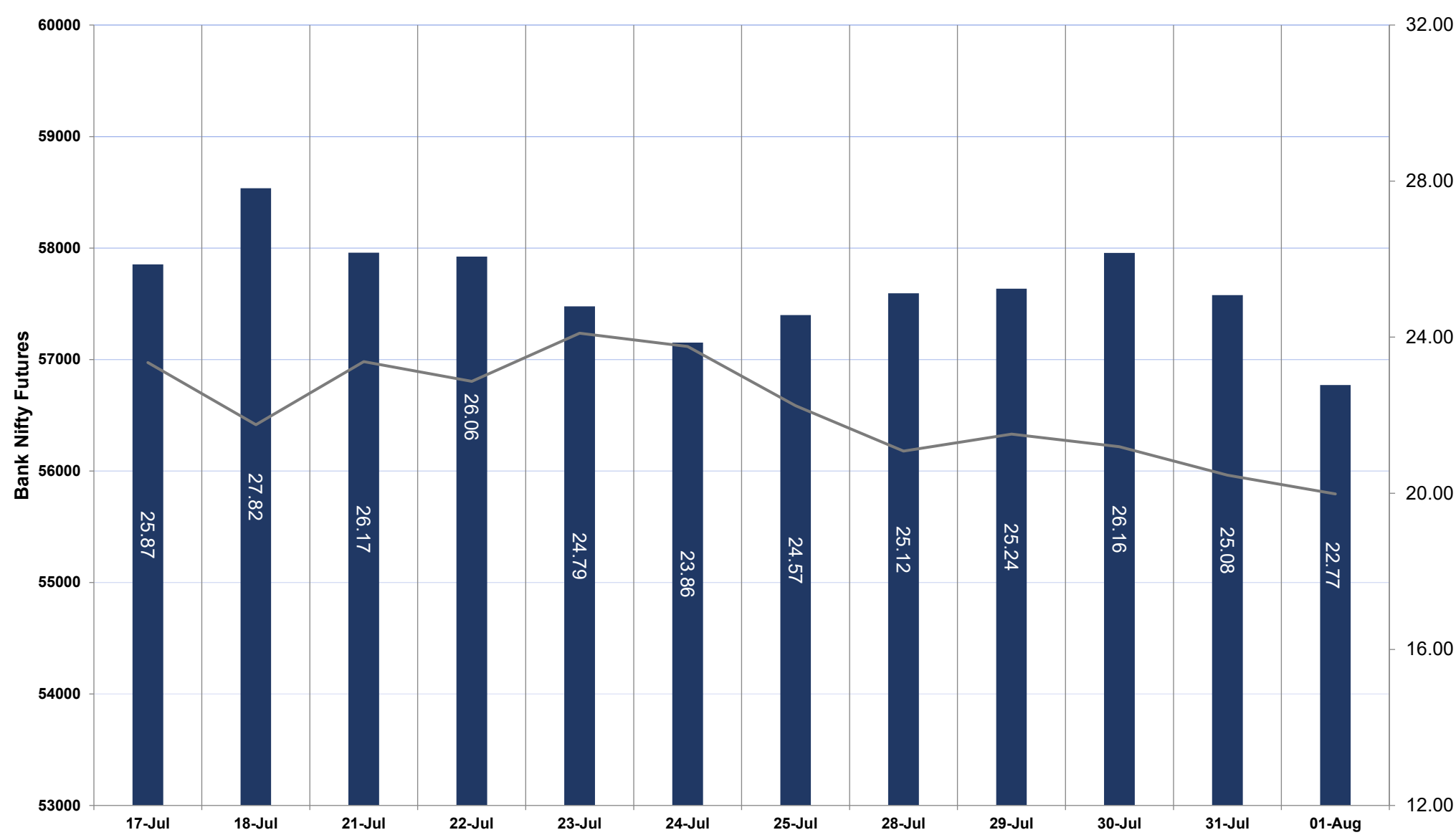
SPREAD: FUTURE & SPOT



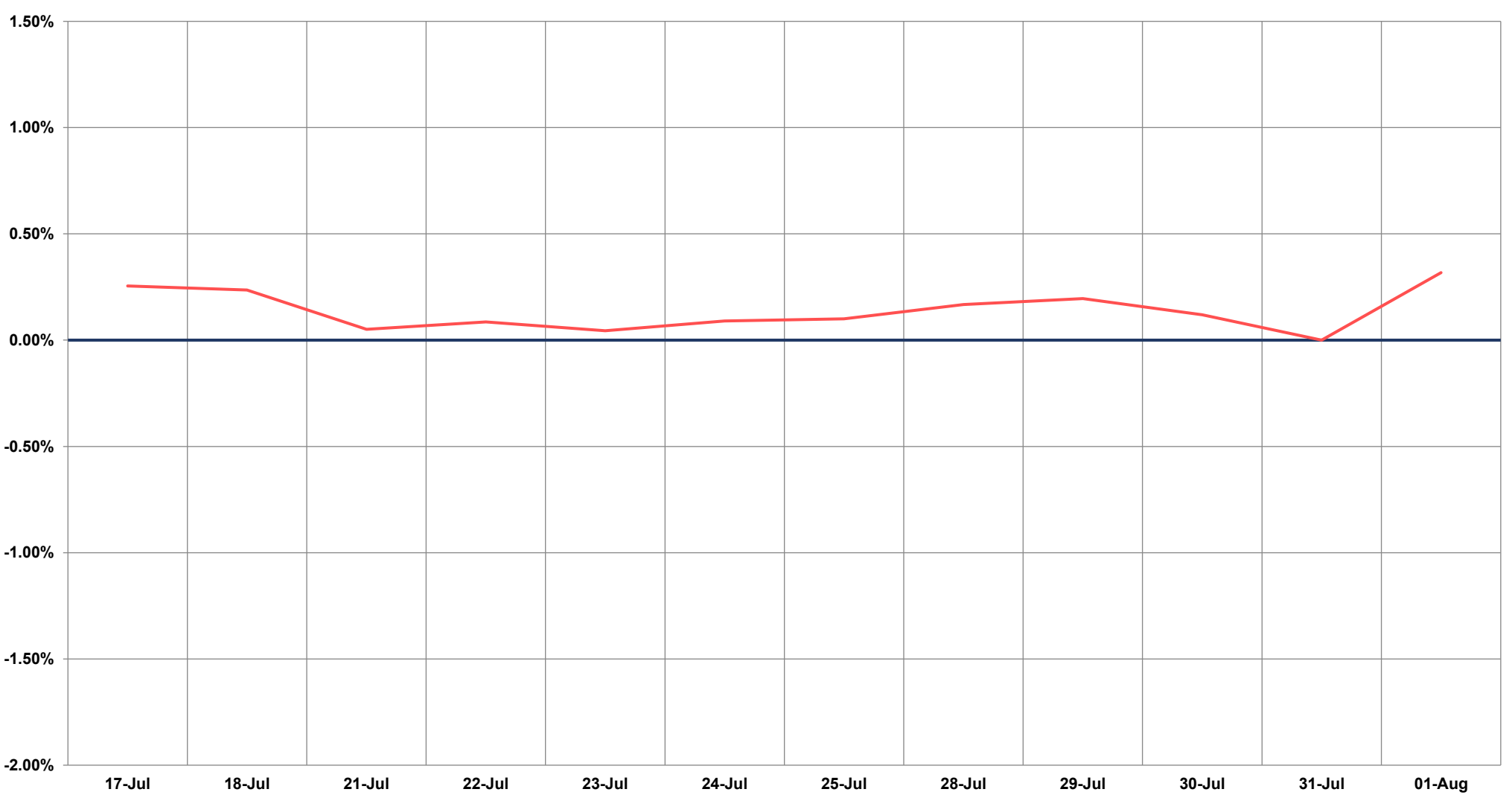
TECHNICAL VIEWS



BANK NIFTY FUTURES



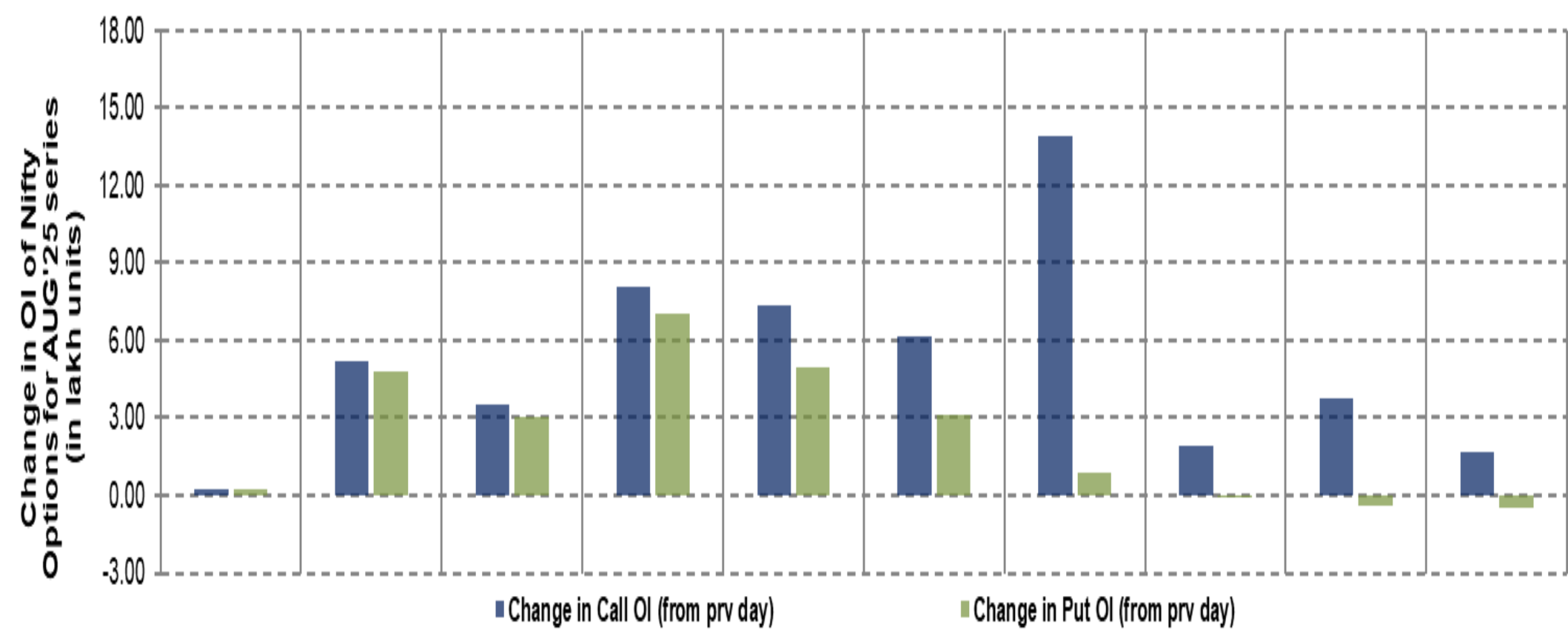
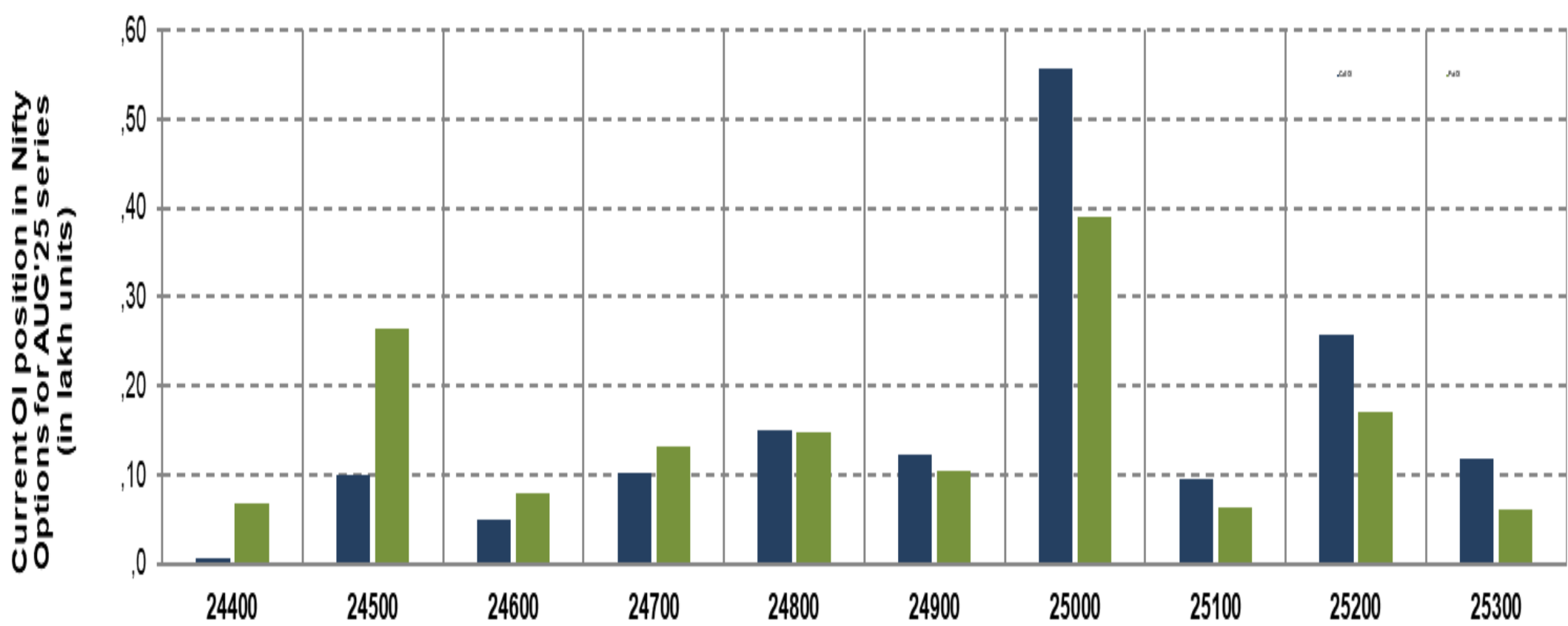
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 1.39 million in Open Interests is **Strike Price of 25000**
- **Most Active Nifty Put** with a addition of 0.7 millions in Open Interests is **Strike Price of 24700**
- **Maximum Open Interest an outstanding** was 5.56 millions for Calls at **Strike Price of 25000**
- **Maximum Open Interest an outstanding** was 3.90 millions for puts at **Strike Price of 25000**

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