



MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

Aug 07, 2025



Indian equity benchmarks staged a strong recovery on Thursday, driven by value buying in IT and Pharma stocks. After making a cautious start, soon markets slipped into red as traders were cautious after US President Donald Trump slapped an additional 25 per cent duty -- doubling it to 50 per cent -- on Indian goods over New Delhi's continued imports of Russian oil. However, in last hour of trade, markets came off from day's low points and ended in positive territory.

Some of the important factors in today's trade:

Services firms maintain positive outlook on demand conditions in Q2: Traders took support of quarterly Services and Infrastructure Outlook Survey of Reserve Bank of India noting that services firms maintained their positive outlook on demand conditions in Q2:2025-26, though their level of optimism recorded some moderation vis-a-vis the previous quarter.

Trump tariffs may impact India's 55% exports to US: Traders overlooked Federation of Indian Export Organisations (FIEO) DG Ajay Sahai's statement that the US' decision to impose an additional 25% tariff on Indian goods is extremely shocking and will impact 55% of India's exports to US.

Foreign fund outflows: Traders paid no heed towards exchange data showed Foreign Institutional Investors (FIIs) remained net sellers, offloading equities worth Rs 4,999.10 crore on Wednesday.

Global front: European markets were trading mostly in green, ahead of the Bank of England's interest-rate decision. Asian markets ended mostly in green amid hopes for Sino-U.S. trade deal and better-than-expected China's July exports data.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	80623.26	79.27	0.10
NIFTY	24596.15	21.95	0.09
MIDCAP	45279.07	137.05	0.30
SMLCAP	52136.33	-91.47	-0.18
BSEFMC	20350.60	-9.64	-0.05
HEALTHCARE	43644.34	231.97	0.53
AUTO	53215.77	133.48	0.25
POWER	6630.06	-24.25	-0.36
REALTY	6936.38	-4.86	-0.07
BSE IT	34153.57	246.84	0.73
BANKEX	61770.48	86.17	0.14
OIL GAS	26057.06	-44.84	-0.17
METAL	31024.54	50.80	0.16
INDIA VIX	11.68	-0.27	-2.28

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1420	1554	87
BSE	1844	2193	155

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	11918	10375	15
NSE CASH	98041	89123	10
NSE F&O	178838	133585	34

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	21.71	3.35	1.35
SENSEX	22.57	4.29	1.21

KEY NUMBERS TRACKER



FII – DII ACTIVITY IN CASH SEGMENT (₹ in Crs)			
FII-DII*	Buy	Sell	Net
DII	19116	8356	10760
FII	10159	15373	(5214)

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)			
FII	Buy	Sell	Net
Ind. Futures	3018.35	4149.27	(1131)
Ind. Options	2974385.77	2970511.60	3874
Stk. Futures	21561.10	20320.65	1240
Stk. Options	19173.60	19206.58	(33)

PUT-CALL RATIO		
Index	Current	Previous
NIFTY	0.92	0.98
BANK NIFTY	0.84	0.77

DOLLAR INDEX			
Dollar Index	Current	Previous	% Change
DXY	98.20	98.18	0.03

10-YEARS G-SEC YIELD			
Country	Current	Previous	% Change
INDIA	6.385	6.407	-0.02
USA	4.226	4.235	-0.00

KEY COMMODITIES TRACKER (in \$)			
Commodity	Current	Change Points	% Change
Gold	3387.70	17.04	0.50
Silver	38.37	0.49	1.30
Crude-Oil	64.69	0.44	0.70
Brent-Crude	67.22	0.45	0.66

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES				
Expiry		Close	Change Points	% Change
26 AUG-25	USD-INR	87.62	-0.21	-0.23
26 AUG-25	EUR-INR	102.14	0.13	0.13
26 AUG-25	GBP-INR	117.44	0.42	0.35
26 AUG-25	JPY- INR	59.65	0.22	0.38

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS						
Index	Close	S2	S1	Pivot	R1	R2
NIFTY	24596	24235	24415	24525	24706	24815
SENSEX	80623	79464	80044	80391	80970	81317
NIFTY FUTURES	24673	24289	24481	24601	24793	24913
BANK NIFTY	55521	54729	55125	55370	55766	56011
CNX IT	34727	34003	34365	34586	34948	35170
CNX MIDCAP	56938	55557	56247	56641	57332	57726
CNX SMALLCAP	17693	17323	17508	17613	17798	17903
INDIA VIX	11.69	11.10	11.40	11.85	12.15	12.60

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 07-08-2025
PNBHOUSING

TECHNICAL VIEWS



NIFTY

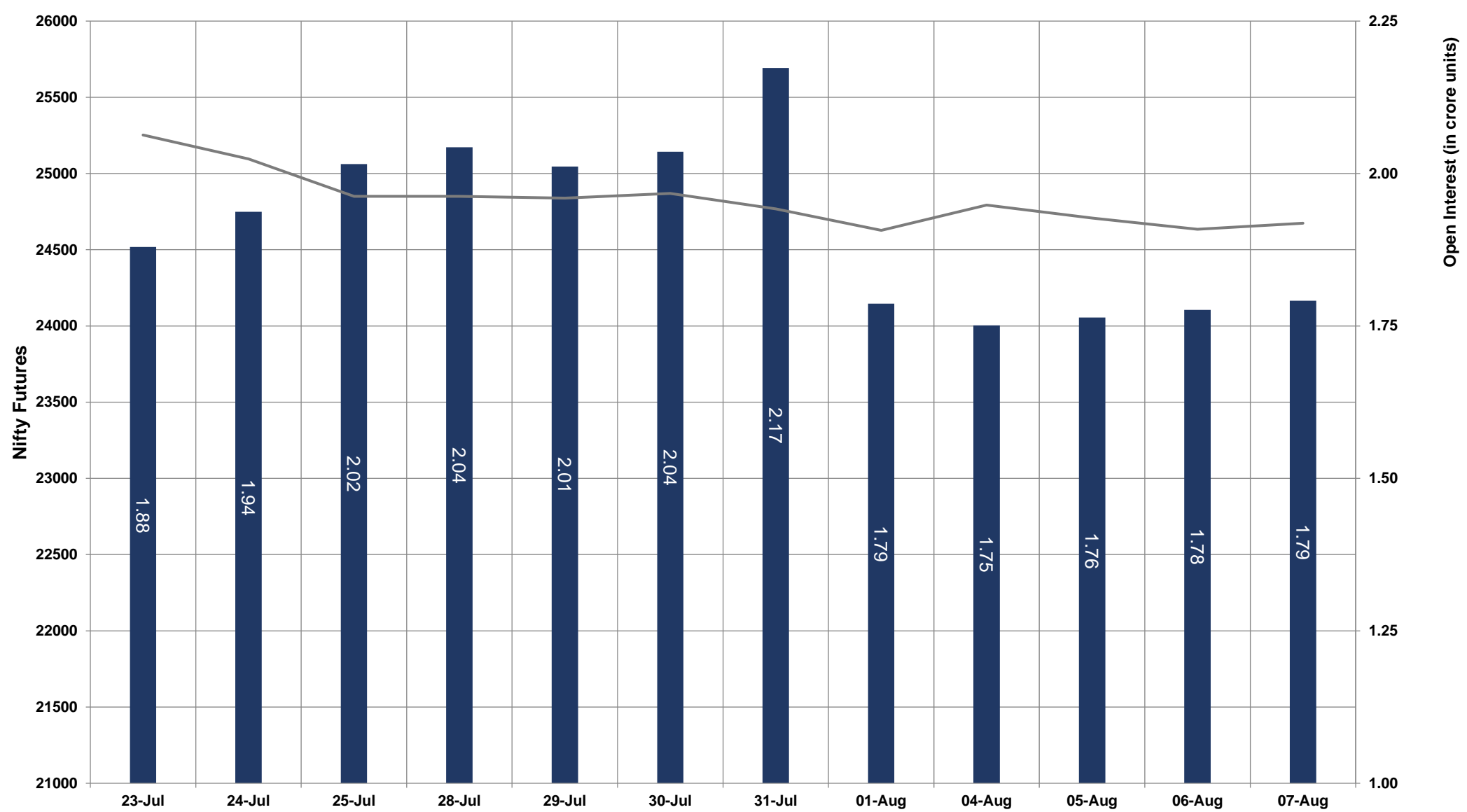


- Nifty Cash = **24596.15 (0.09%)**
- Resistance levels = **24780** and **24920**
- Support levels = **24400** and **24350**

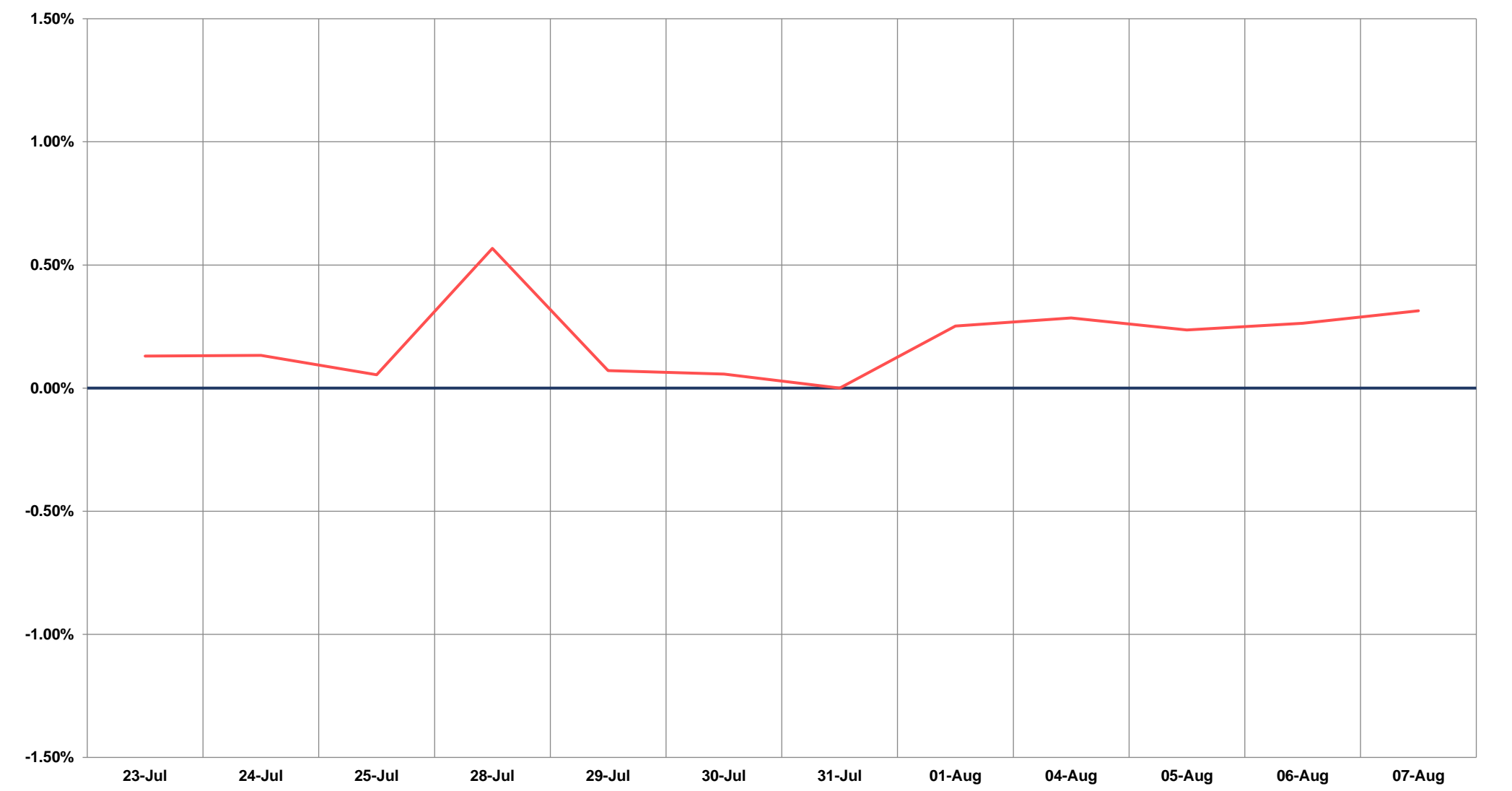
TECHNICAL VIEWS



NIFTY FUTURES



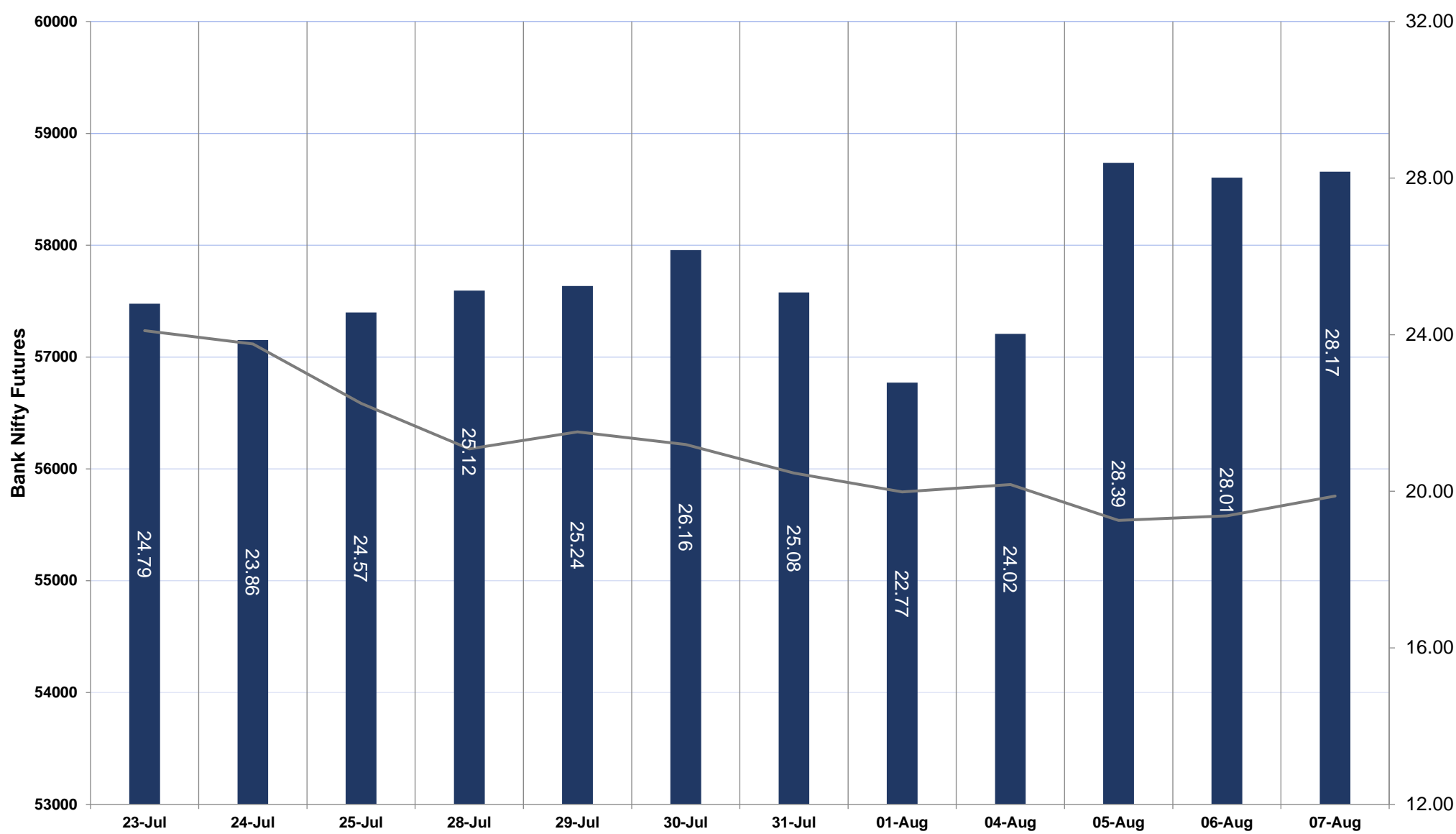
SPREAD: FUTURE & SPOT



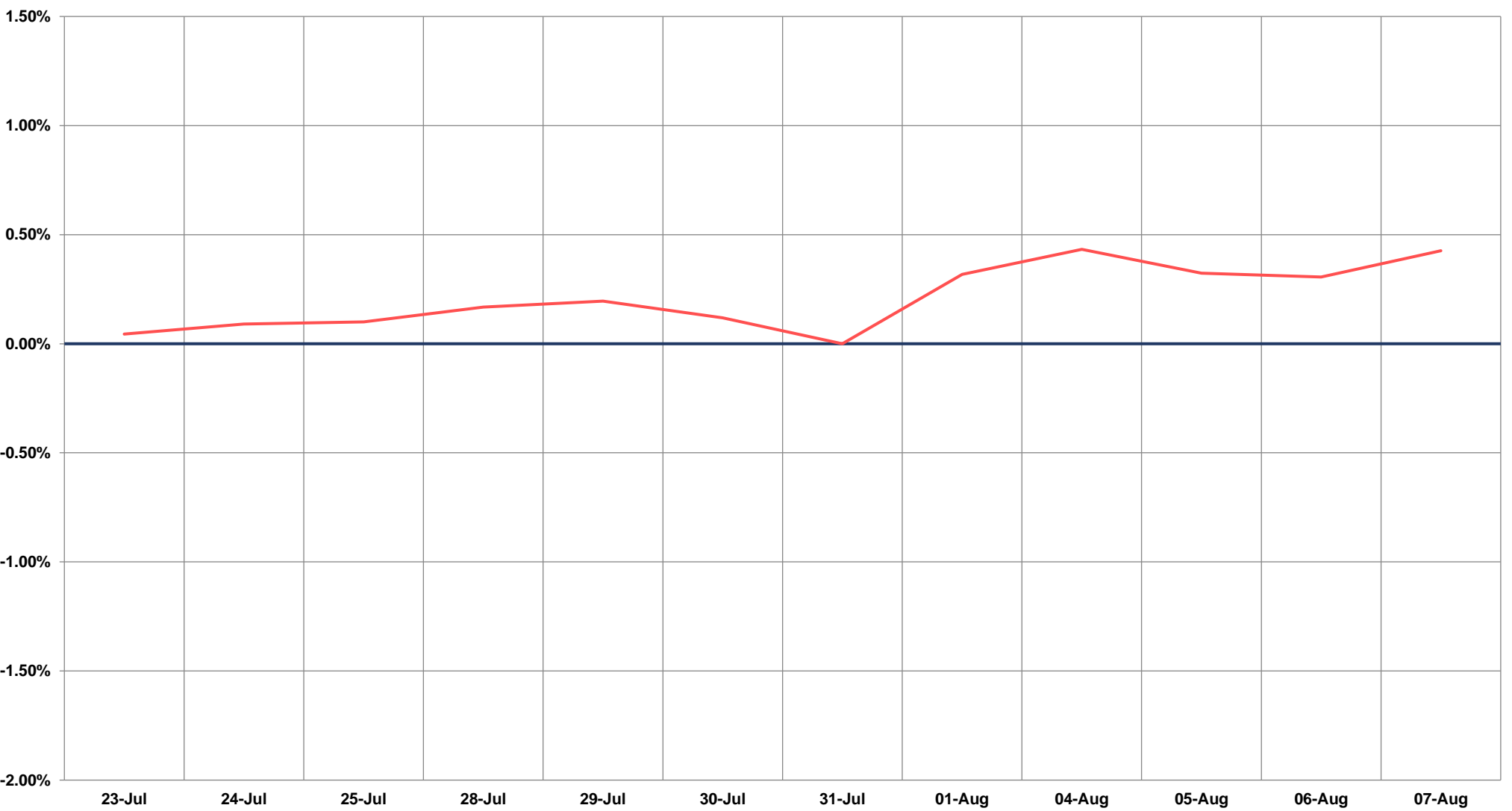
TECHNICAL VIEWS



BANK NIFTY FUTURES



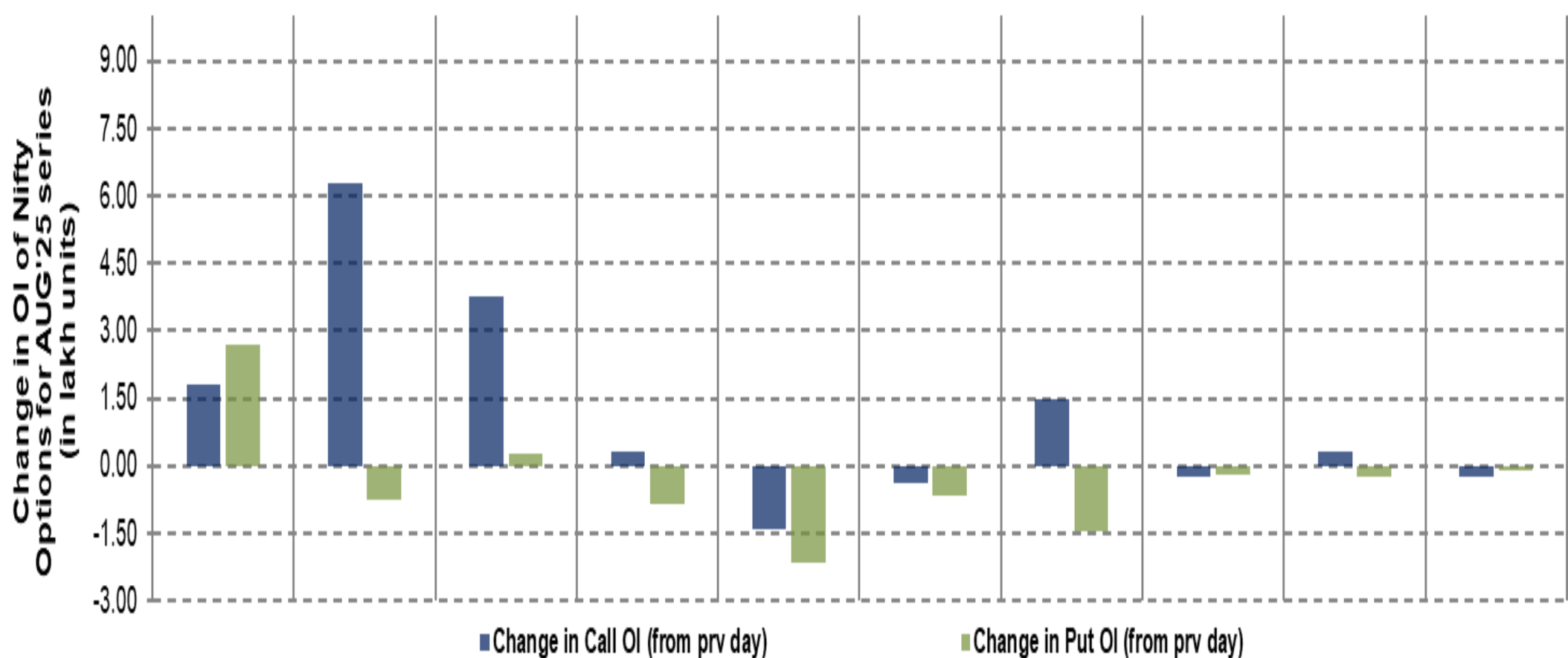
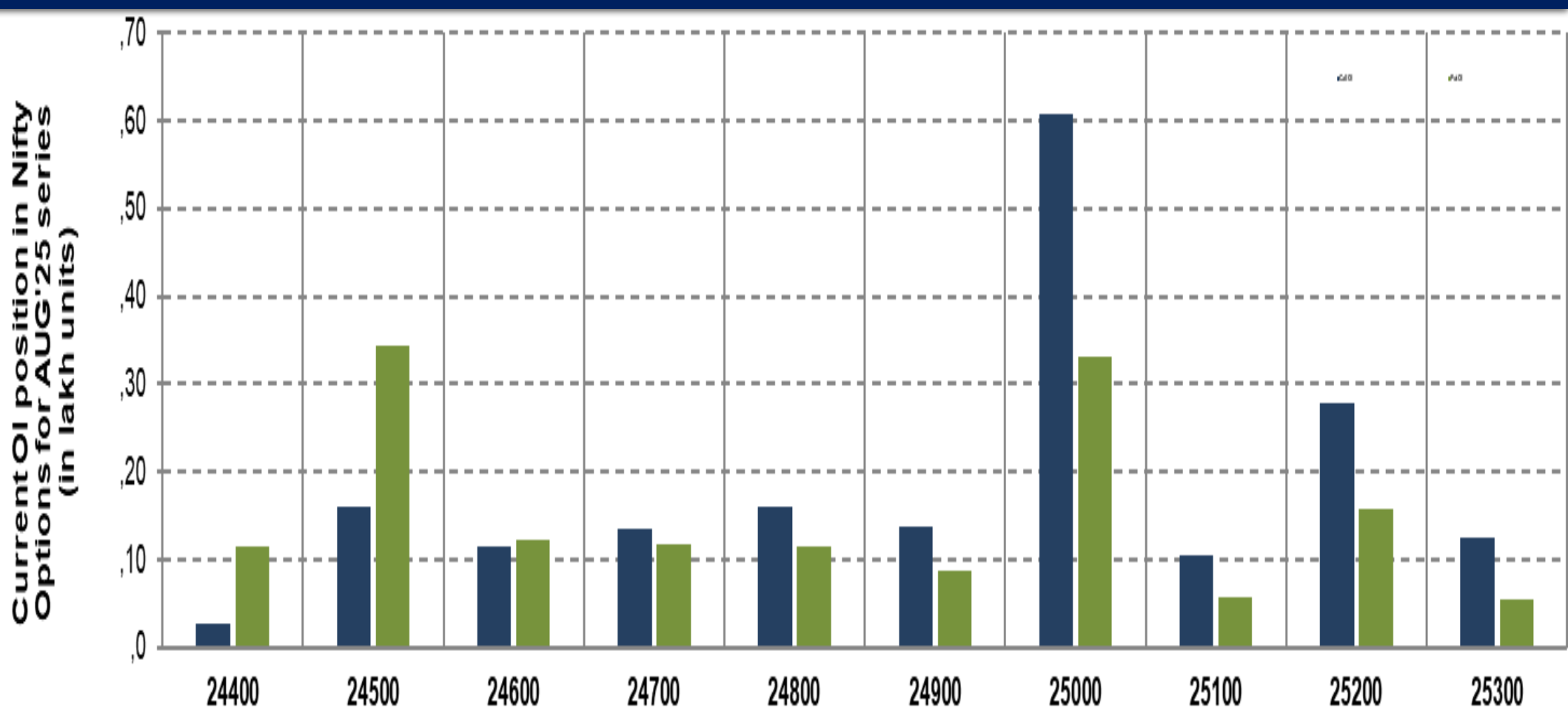
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.62 million in Open Interests is **Strike Price of 24500**
- **Most Active Nifty Put** with an addition of 0.27 millions in Open Interests is **Strike Price of 24400**
- **Maximum Open Interest an outstanding** was 6.08 millions for Calls at **Strike Price of 25000**
- **Maximum Open Interest an outstanding** was 3.43 millions for puts at **Strike Price of 24500**

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