MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

Aug 11, 2025

MARKET COMMENTARY

Indian equity benchmarks witnessed optimistic performance on Monday and ended with gains of around a percent despite escalating trade tensions with the United States. Since morning, markets maintained their gains as traders preferred to buy stocks. Traders turned their focus towards domestic Consumer Price Index (CPI) and Wholesale Price Index (WPI) inflation figures to be out tomorrow. In late afternoon session, indices gained traction and ended the session near day's high levels.

Some of the important factors in today's trade:

India negotiating trade agreements with several countries, including the US: Traders took support as Commerce and Industry Minister Piyush Goyal stated that India is negotiating trade agreements with several countries, including the US, and stressed that many nations are keen to engage with New Delhi on the trade front. He also exuded confidence that India's exports in 2025-26 will exceed last year's figures. In 2024-25, India's goods and services exports touched $825 billion.

Foreign funds inflows: Sentiments were positive as foreign institutional investors (FIIs) were the net buyer on Friday's trade, with net buying of Rs 1,932.81 crore.

India's forex reserves down by $9.32 billion to $688.87 billion: Investors overlooked RBI's data showed that India's forex reserves dropped by $9.32 billion to $688.87 billion for the week ended August 1 in one of the highest declines in the recent past.

Global front: European markets were trading mostly in red as investors looked ahead to a Russia-U.S. summit this week that could help stop the war in Ukraine. Asian markets ended mostly higher in thin trade as investors looked ahead to a slew of US and Chinese economic data and the Donald Trump-Vladimir Putin meeting on August 15 in Alaska for directional cues.

MARKET SELFIE

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MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	80604.08	746.29	0.93
NIFTY	24585.05	221.75	0.91
MIDCAP	44921.00	350.11	0.79
SMLCAP	51775.98	179.01	0.35
BSEFMC	20352.73	152.48	0.75
HEALTHCARE	43642.67	481.72	1.12
AUTO	53015.03	541.95	1.03
POWER	6628.93	55.70	0.85
REALTY	6917.77	126.09	1.86
BSE IT	33939.18	122.77	0.36
BANKEX	61818.29	691.01	1.13
OIL GAS	26184.74	155.55	0.60
METAL	30634.12	173.12	0.57
INDIA VIX	12.22	0.19	1.54

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1603	1413	79
BSE	2181	1983	173

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	11679	15524	(25)
NSE CASH	81194	100445	(19)
NSE F&O	127734	142271	(10)

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	21.67	3.33	1.36
SENSEX	22.61	4.28	1.18

KEY NUMBERS TRACKER

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

FII-DII*	Buy	Sell	Net
DII	14700	8748	5951
FII	9409	10568	(1159)

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)

FII	Buy	Sell	Net
Ind. Futures	2581.09	2031.44	550
Ind. Options	785092.72	791247.72	(6155)
Stk. Futures	18093.81	15684.99	2409
Stk. Options	20354.09	20041.53	313

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.03	0.53
BANK NIFTY	0.81	0.76

DOLLAR INDEX

Dollar Index	Current	Previous	% Change
DXY	98.57	98.18	0.40

10-YEARS G-SEC YIELD

Country	Current	Previous	% Change
INDIA	6.428	6.399	0.45
USA	4.269	4.283	-0.33

KEY COMMODITIES TRACKER (in $)

Commodity	Current	Change Points	% Change
Gold	3347.92	-50.54	-1.48
Silver	37.72	-0.58	-1.53
Crude-Oil	63.92	0.58	0.91
Brent-Crude	66.56	0.47	0.68

CURRENCY FUTURES & INDEX TRENDS TRACKER

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CURRENCY FUTURES

Expiry	Close	Change Points	% Change
26 AUG-25 USD-INR	87.80	0.09	0.11
26 AUG-25 EUR-INR	102.26	0.10	0.10
26 AUG-25 GBP-INR	118.05	0.17	0.14
26 AUG-25 JPY- INR	59.65	0.24	0.40

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS

Index	Close	S2	S1	Pivot	R1	R2
NIFTY	24585	24258	24421	24511	24675	24765
SENSEX	80604	79474	80039	80338	80903	81201
NIFTY FUTURES	24628	24324	24476	24561	24713	24798
BANK NIFTY	55511	54686	55098	55340	55753	55995
CNX IT	34545	34069	34307	34466	34703	34862
CNX MIDCAP	56479	55508	55994	56278	56764	57048
CNX SMALLCAP	17492	17261	17376	17447	17562	17633
INDIA VIX	12.22	11.63	11.92	12.33	12.62	13.03

INDEX TREND ANALYSIS

Index	Daily	Weekly	Monthly
NIFTY	Neutral	Neutral	Neutral
SENSEX	Neutral	Neutral	Neutral
NIFTY FUTURES	Neutral	Neutral	Neutral
BANK NIFTY	Neutral	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 12-08-2025

PGEL, RBLBANK, PNBHOUSING

TECHNICAL VIEWS

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NIFTY

- Nifty Cash = **24585.05 (0.91%)**
- Resistance levels = **24650** and **24780**
- Support levels = **24475** and **24350**

TECHNICAL VIEWS

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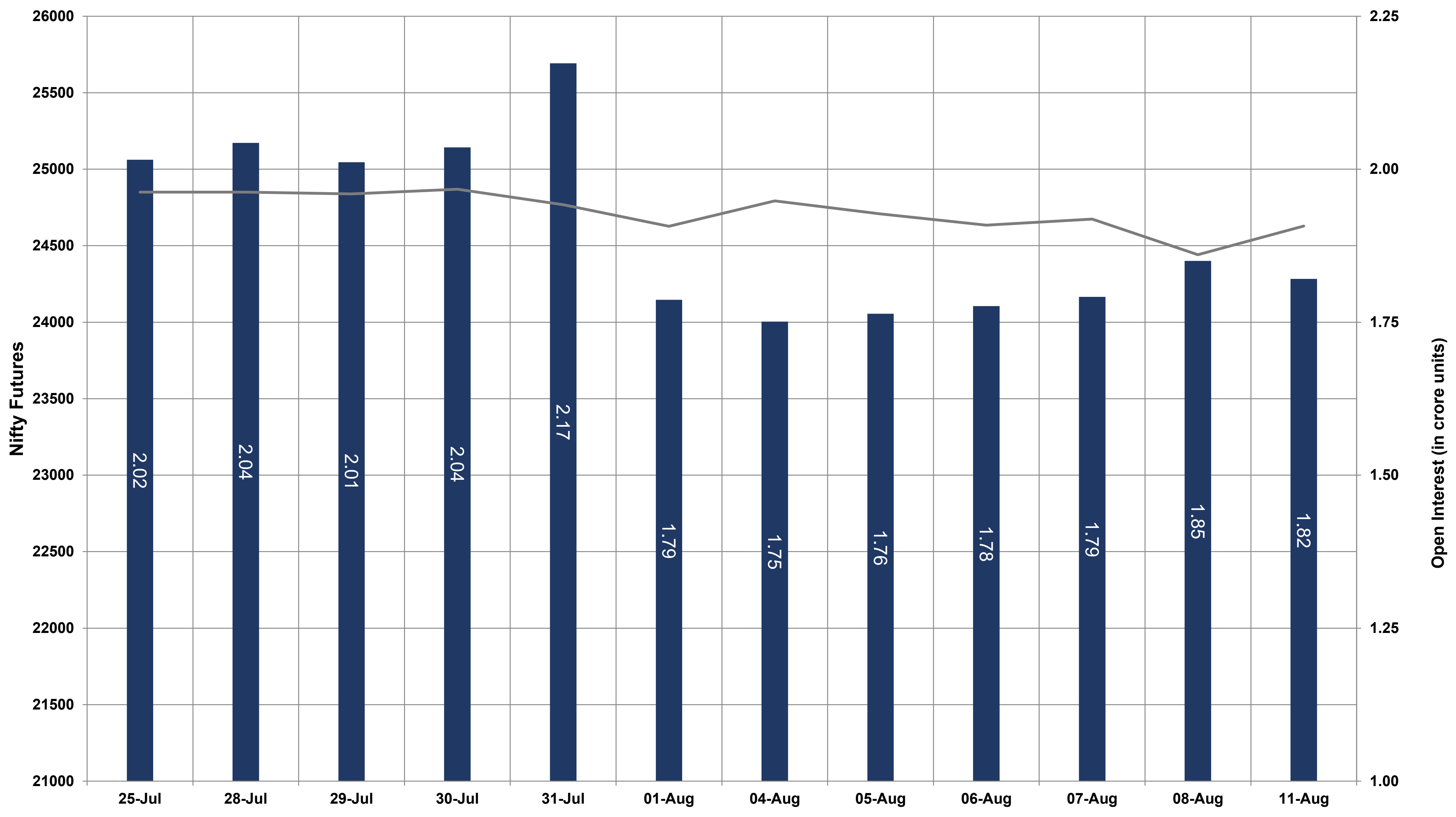
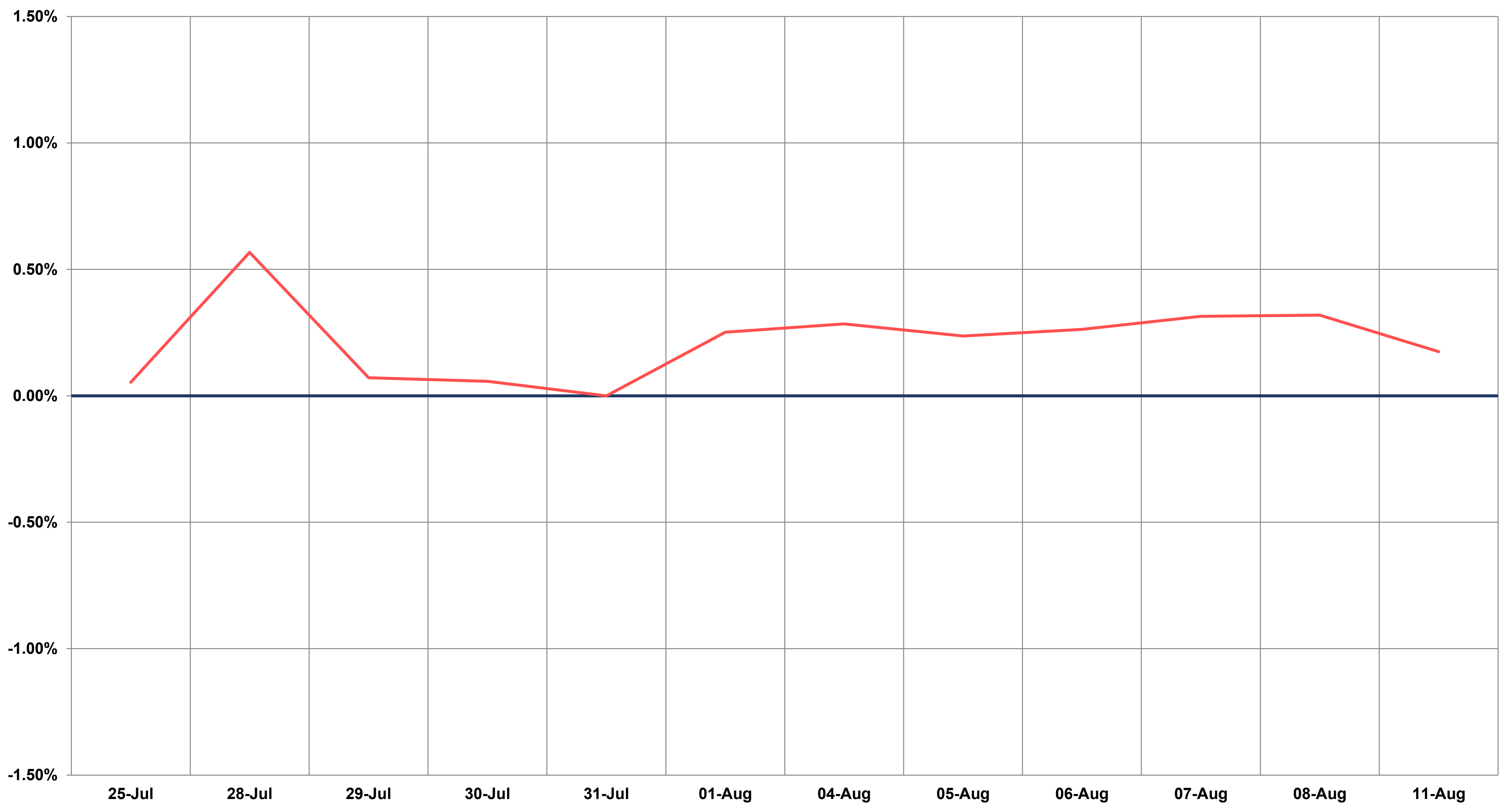
NIFTY FUTURES



SPREAD: FUTURE & SPOT



TECHNICAL VIEWS

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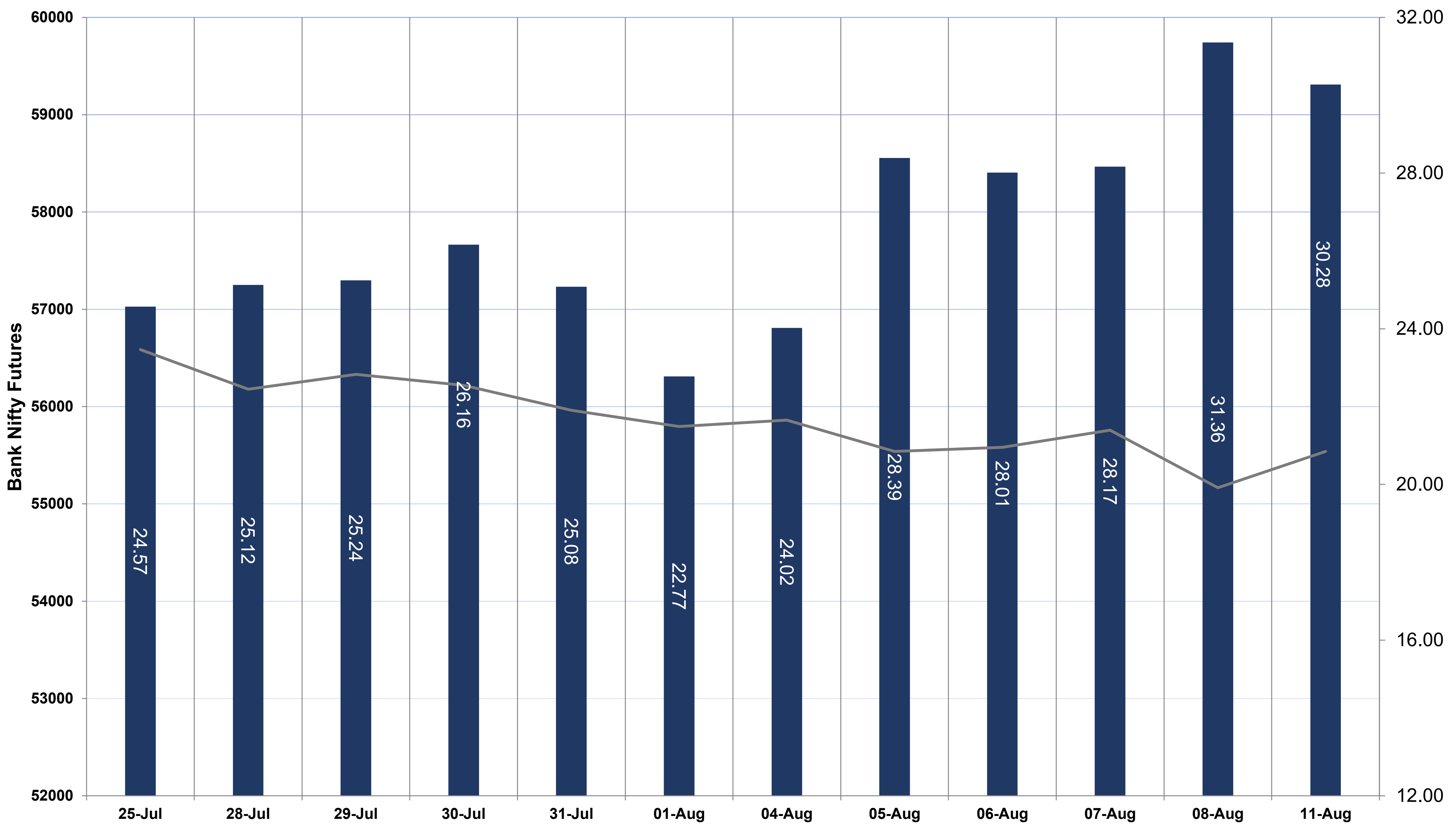
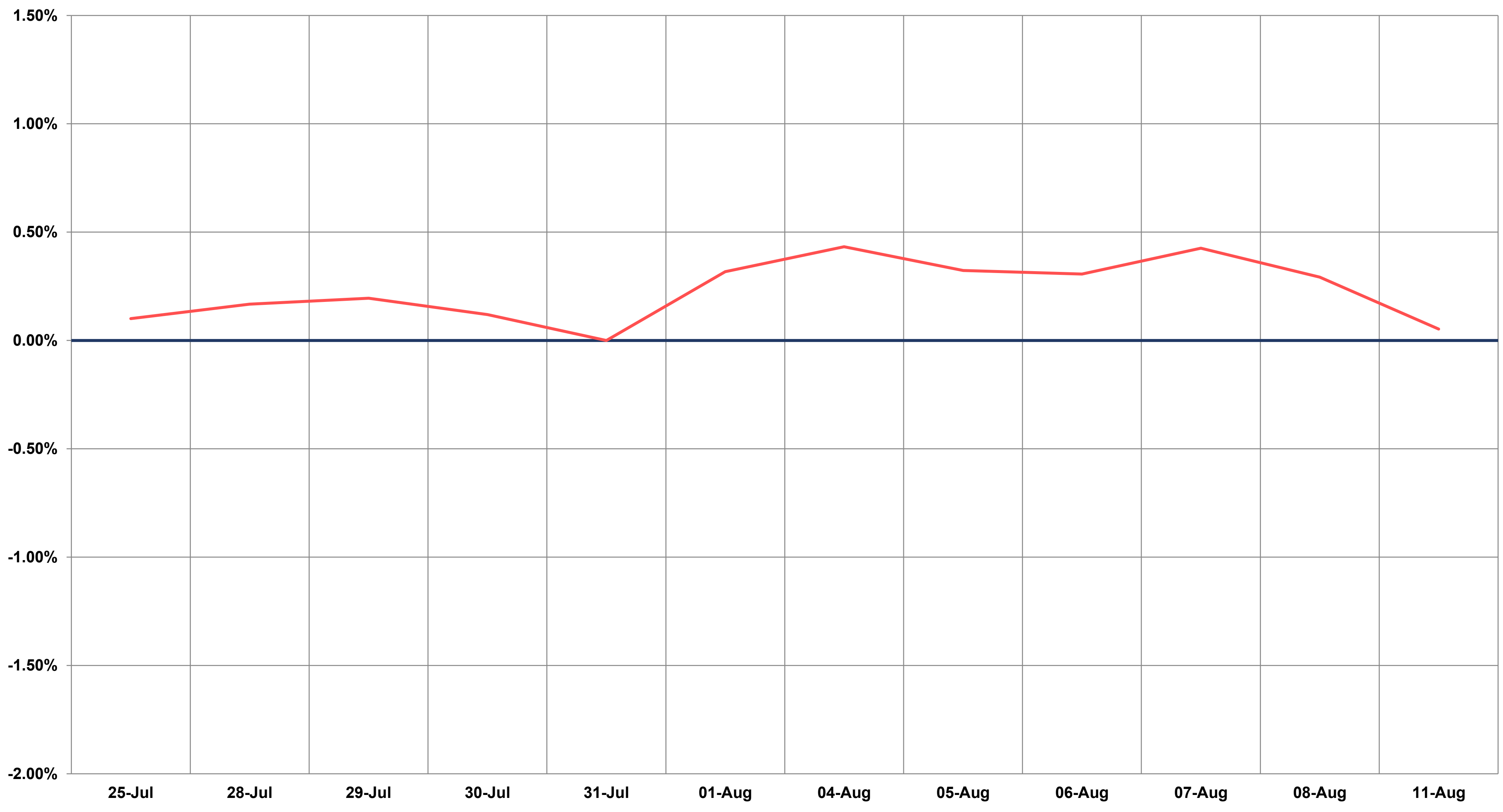
BANK NIFTY FUTURES



SPREAD: FUTURE & SPOT



TECHNICAL VIEWS

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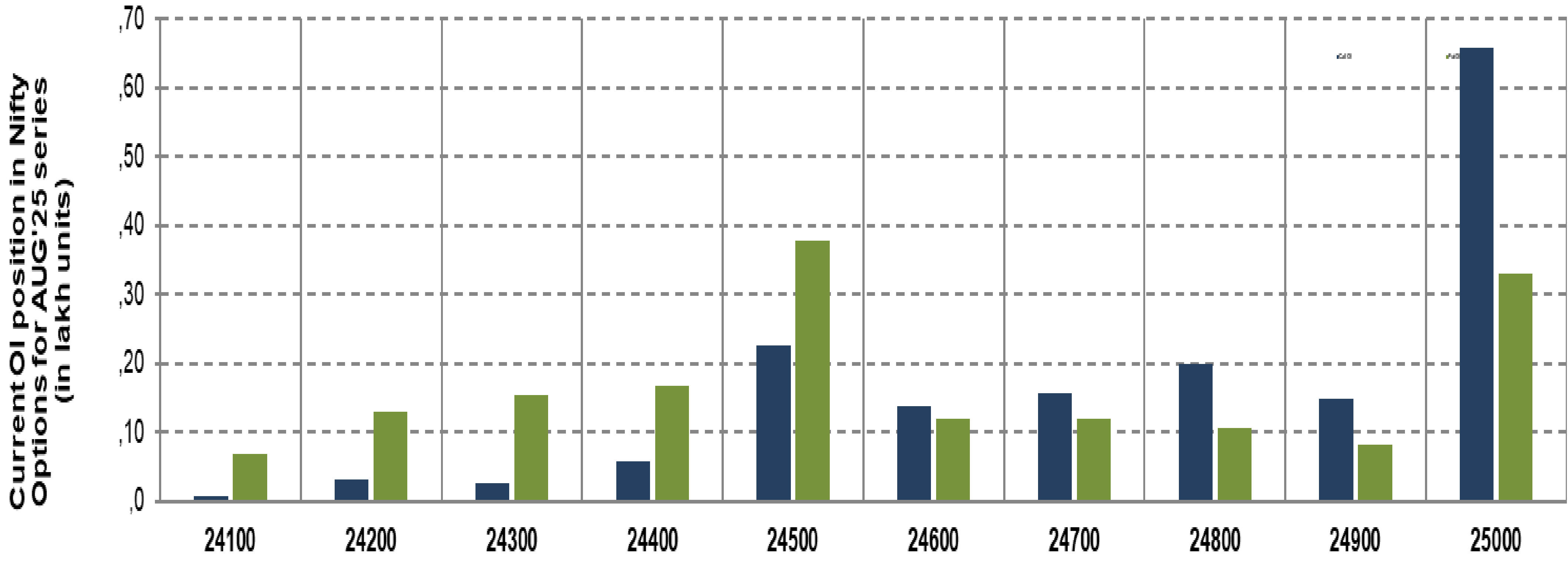
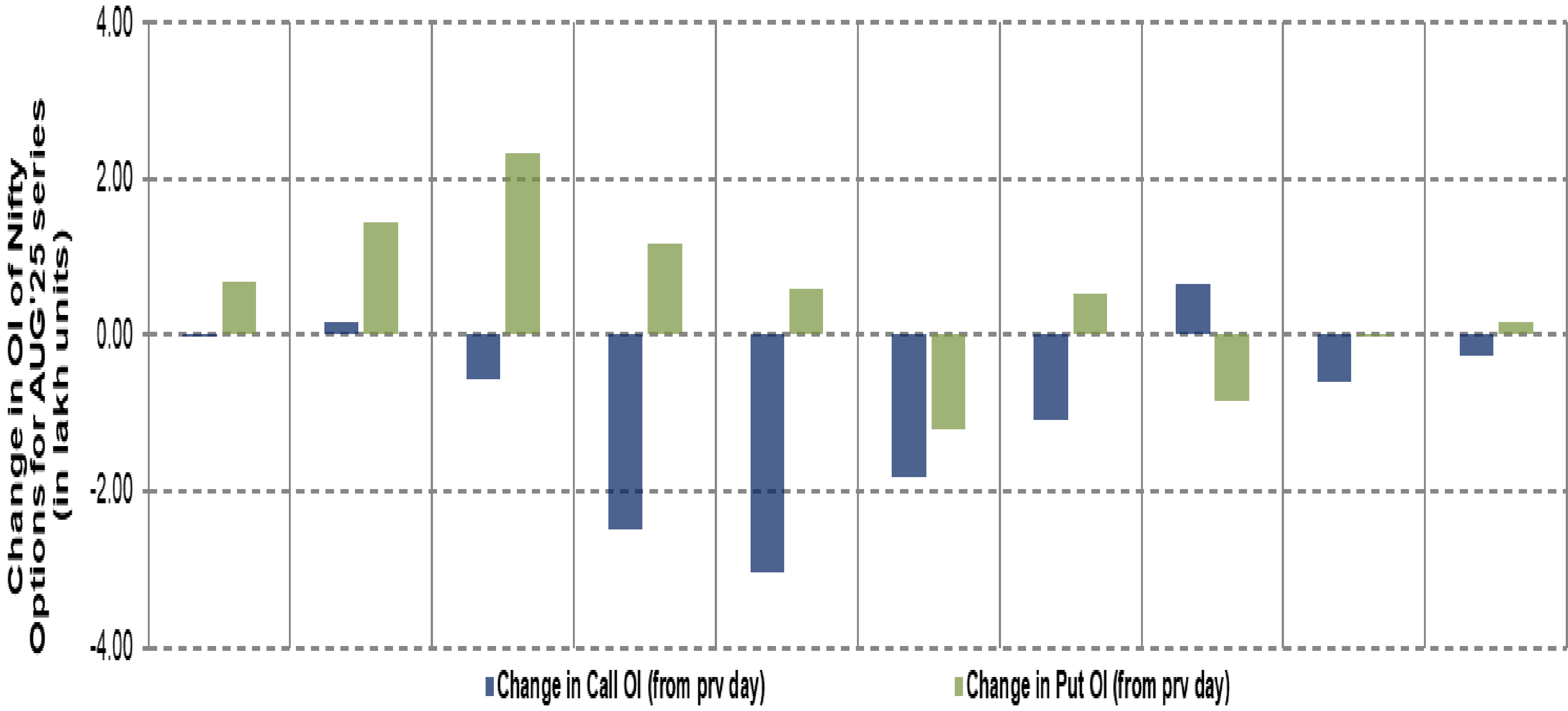
NIFTY OPTIONS





- **Most Active Nifty Call** with an subtraction of 0.30 **million** in Open Interests is **Strike Price of 24500**
- **Most Active Nifty Put** with an addition of 0.23 **millions** in Open Interests is **Strike Price of 24300**
- **Maximum Open Interest an outstanding** was 6.58 **millions** for Calls at **Strike Price of 25000**
- **Maximum Open Interest an outstanding** was 3.79 **millions** for puts at **Strike Price of 24500**

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