



# MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

Aug 14, 2025



Indian equity benchmarks ended a rangebound session with minor gains on Thursday, as investors remained on the sidelines ahead of the upcoming US-Russia talks scheduled on August 15, as well as the long weekend holiday. Markets made a cautious start and traded near the flat line throughout the day, as traders were cautious with the exchange data showing that Foreign Institutional Investors (FIIs) were net sellers for the third consecutive session, offloading equities worth Rs 3,644.43 crore.

Some of the important factors in today's trade:

US tariffs not to impact India's growth: Sentiments remained upbeat as S&P Global Ratings Director YeeFarn Phua said that Trump tariffs will not have any impact on India's growth, as it is not a trade-oriented economy, and its sovereign ratings outlook will continue to remain positive.

India's headline inflation to average 3.5% in FY26: Traders took support with Crisil in its research report for August stated that India's headline inflation is expected to average 3.5% this fiscal year (FY26), as compared to 4.6% in the last financial year.

India's inflation based on WPI remains in negative territory for second consecutive month in July: Traders took note of report that the inflation based on Wholesale Price Index (WPI) stayed in negative territory for the second consecutive month at (-) 0.58% in July 2025, as prices of food articles and fuel saw deflation, even though prices of manufactured items increased.

Global front: European markets were trading mostly in green, ahead of the upcoming meeting between U.S. President Donald Trump and Russian President Vladimir Putin. Asian markets ended mostly in red as investors digested weak China bank lending data.

# MARKET SELFIE



## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	80597.66	57.75	0.07
NIFTY	24631.30	11.95	0.05
MIDCAP	44979.24	-80.43	-0.18
SMLCAP	51788.88	-306.96	-0.59
BSEFMC	20141.50	-116.31	-0.57
HEALTHCARE	44453.35	-144.15	-0.32
AUTO	53937.53	-10.90	-0.02
POWER	6608.52	-36.31	-0.55
REALTY	6830.97	-52.36	-0.76
BSE IT	34176.54	128.18	0.38
BANKEX	61625.39	141.39	0.23
OIL GAS	26023.52	-310.99	-1.18
METAL	30687.01	-434.22	-1.40
INDIA VIX	12.36	0.21	1.77

## ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1127	1756	105
BSE	1659	2414	148

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	7813	8395	(7)
NSE CASH	83350	87454	(5)
NSE F&O	131651	146566	(10)

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	21.66	3.34	1.40
SENSEX	22.61	4.28	1.23

# KEY NUMBERS TRACKER



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

FII-DII*	Buy	Sell	Net
DII	12595	8894	3700
FII	12287	15176	(2890)

Note: FPI & DII Figures are provisional

## FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)

FII	Buy	Sell	Net
Ind. Futures	1444.00	1461.85	(18)
Ind. Options	1959581.10	1960793.26	(1212)
Stk. Futures	16006.15	17386.11	(1380)
Stk. Options	21759.51	21146.46	613

## PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.08	1.08
BANK NIFTY	0.76	0.75

## DOLLAR INDEX

Dollar Index	Current	Previous	% Change
DXY	97.84	98.25	-0.42

## 10-YEARS G-SEC YIELD

Country	Current	Previous	% Change
INDIA	6.402	6.481	-0.03
USA	4.328	4.231	0.82

## KEY COMMODITIES TRACKER (in \$)

Commodity	Current	Change Points	% Change
Gold	3335.28	-0.18	-0.01
Silver	37.99	-0.01	-0.03
Crude-Oil	63.13	-0.77	-1.21
Brent-Crude	66.14	-0.67	-1.01



# CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES				
Expiry		Close	Change Points	% Change
26 AUG-25	USD-INR	87.65	0.14	0.16
26 AUG-25	EUR-INR	102.47	-0.13	-0.13
26 AUG-25	GBP-INR	119.05	0.33	0.28
26 AUG-25	JPY- INR	59.84	0.23	0.38

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS						
Index	Close	S2	S1	Pivot	R1	R2
NIFTY	24619	24477	24548	24606	24678	24736
SENSEX	80540	80149	80345	80514	80709	80879
NIFTY FUTURES	24712	24552	24632	24690	24770	24828
BANK NIFTY	55181	54870	55026	55183	55339	55496
CNX IT	34693	34407	34550	34696	34839	34985
CNX MIDCAP	56682	56318	56500	56656	56838	56995
CNX SMALLCAP	17614	17499	17556	17597	17655	17696
INDIA VIX	12.14	10.19	11.16	11.76	12.73	13.33

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	Neutral	Sell	Neutral
CNX MIDCAP	Sell	Neutral	Neutral
CNX SMALLCAP	Sell	Neutral	Neutral
INDIA VIX	Neutral	Neutral	Sell

SECURITIES BAN IN F&O TRADES FOR 18-08-2025
TITAGARH, PGEL, RBLBANK, PNBHOUSING

# TECHNICAL VIEWS



## NIFTY

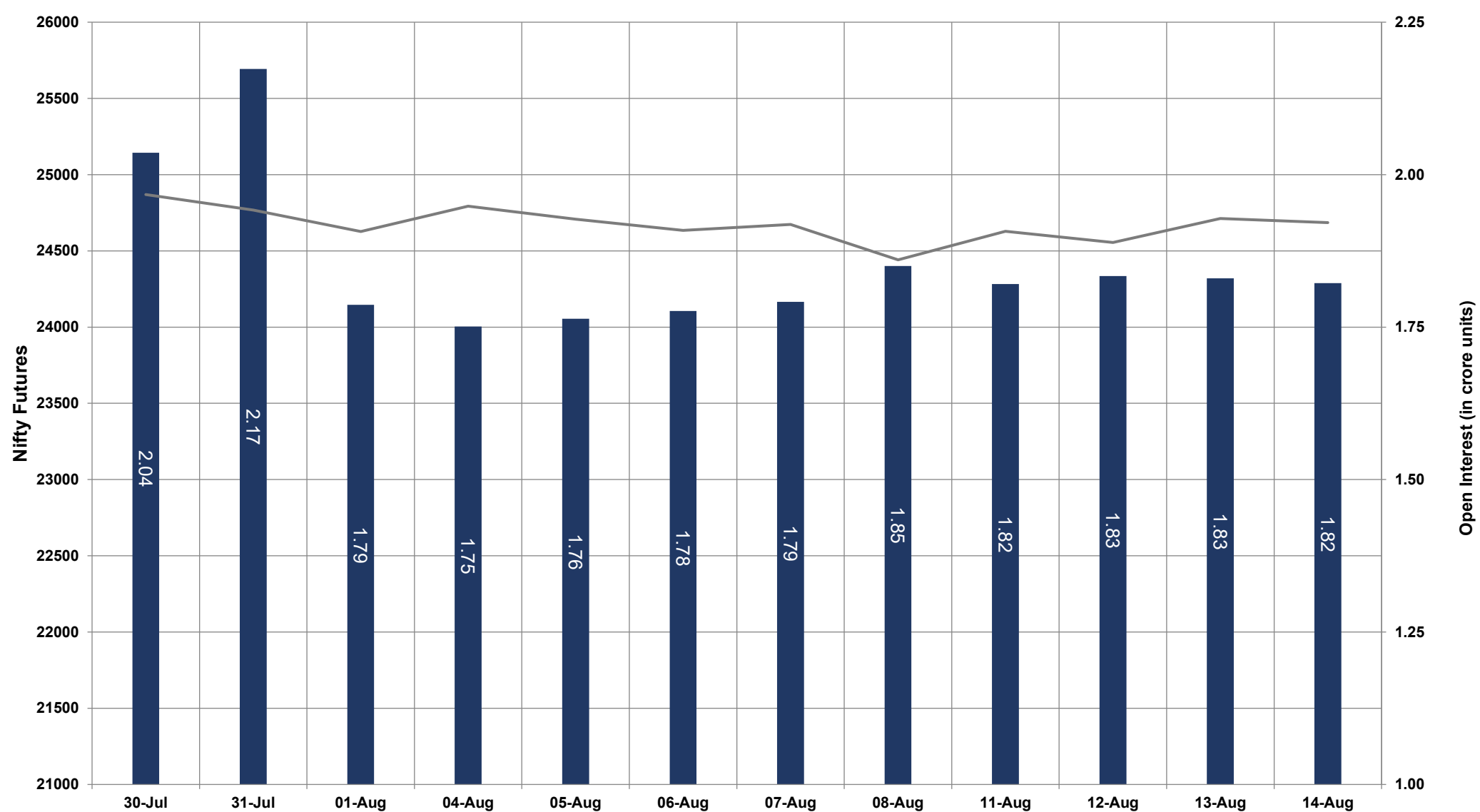


- Nifty Cash = **24631.30 (0.05%)**
- Resistance levels = **24720** and **24830**
- Support levels = **24540** and **24470**

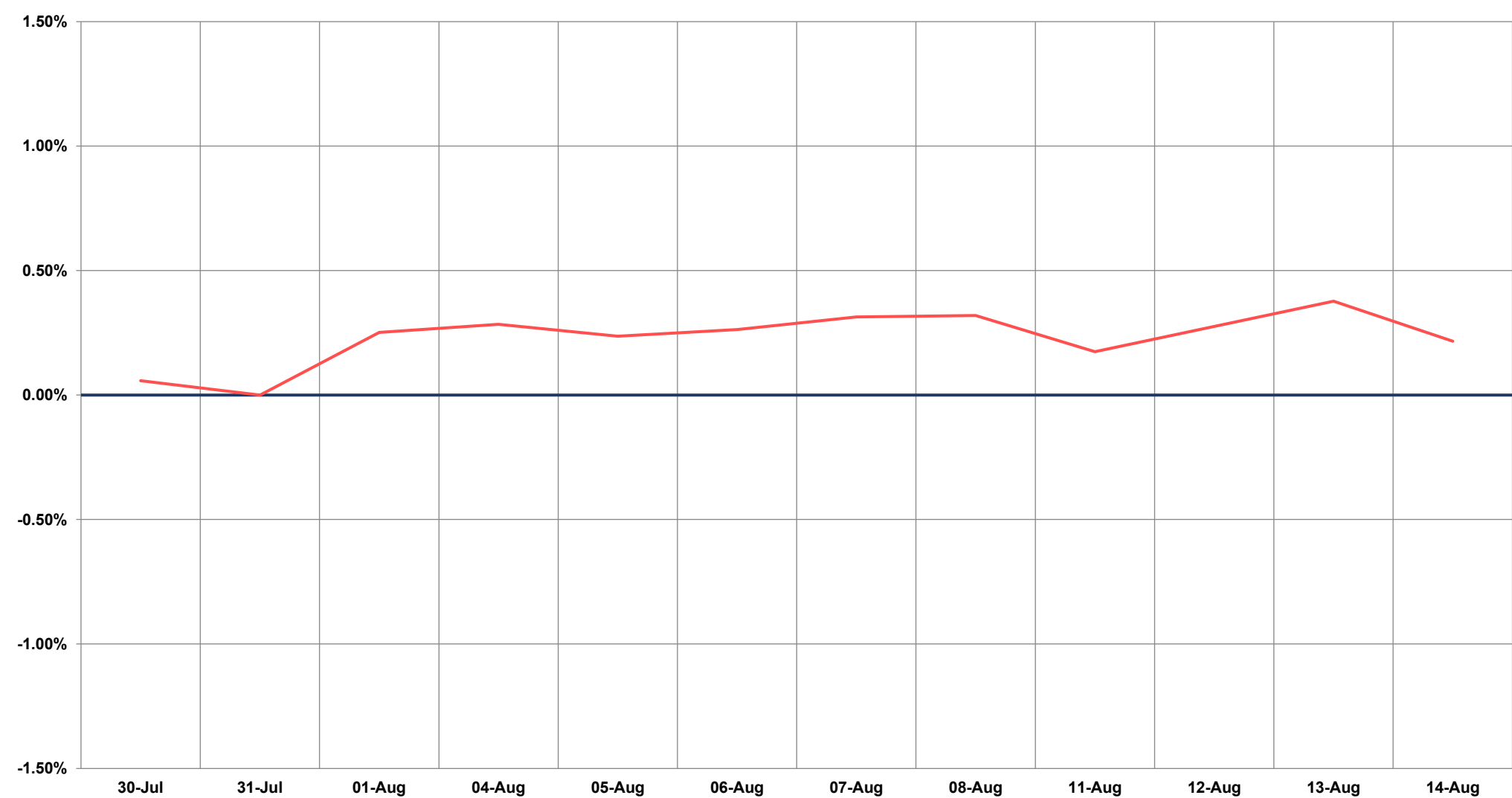
# TECHNICAL VIEWS



## NIFTY FUTURES



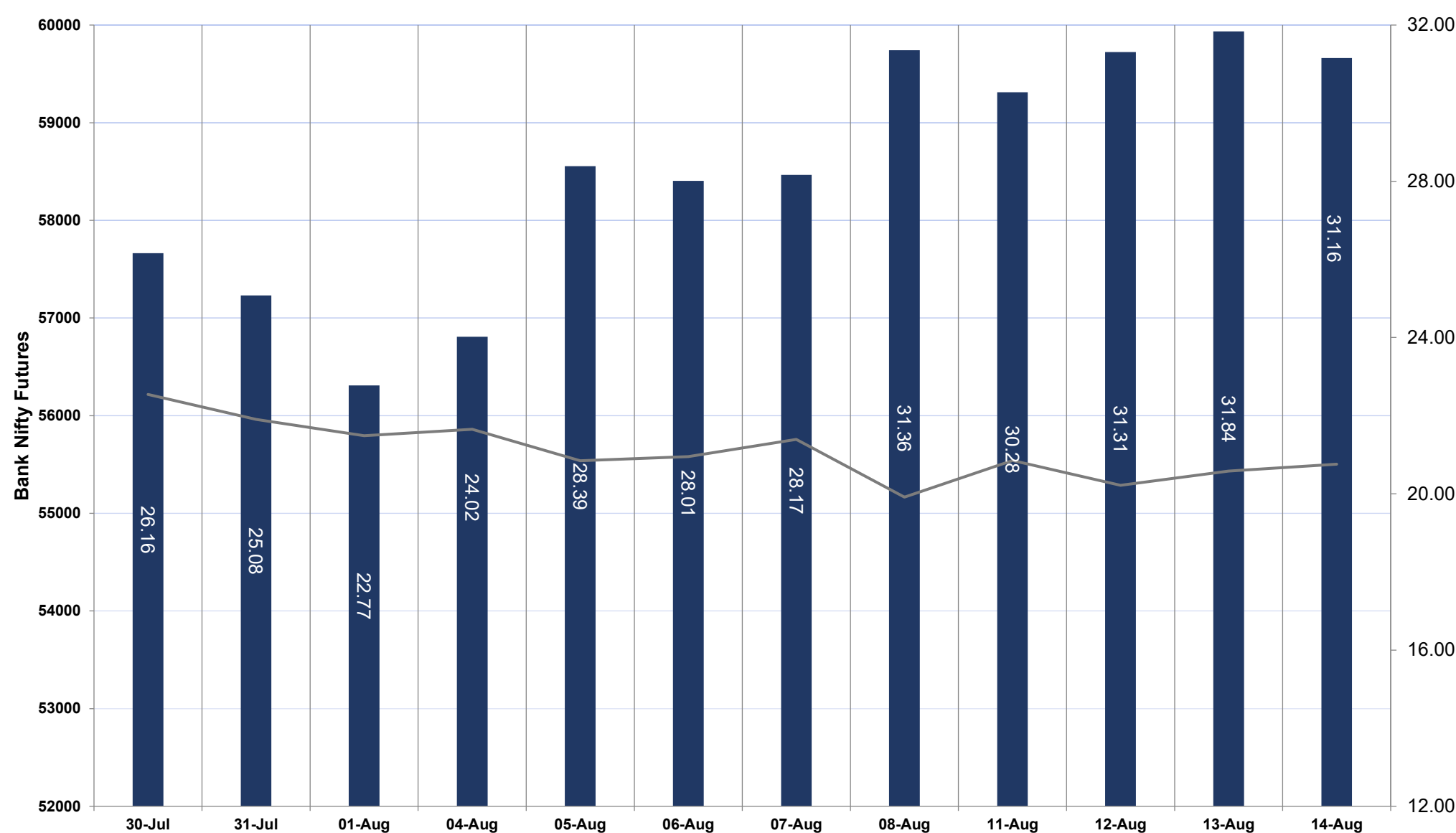
## SPREAD: FUTURE & SPOT



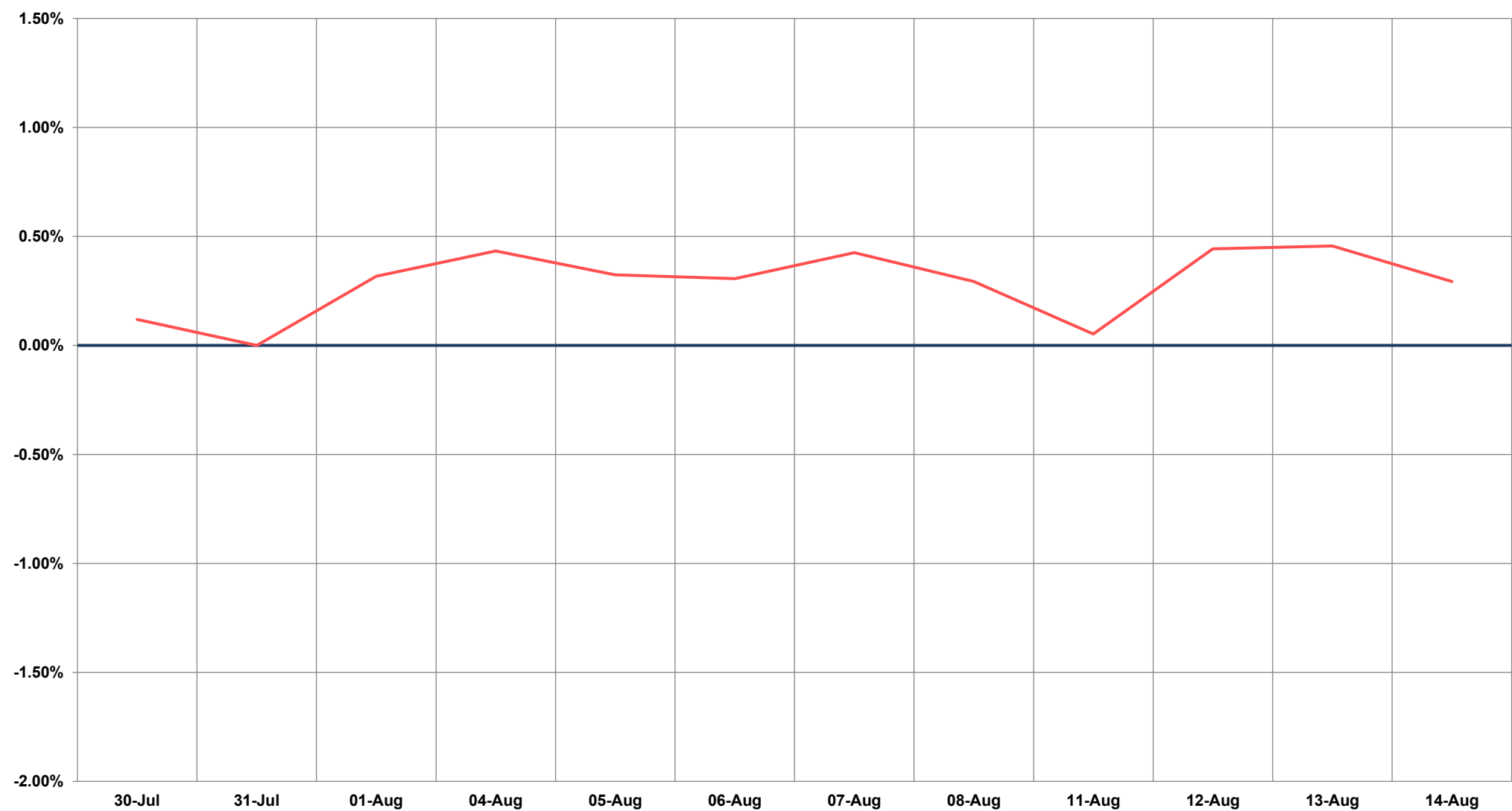
# TECHNICAL VIEWS



## BANK NIFTY FUTURES



## SPREAD: FUTURE & SPOT

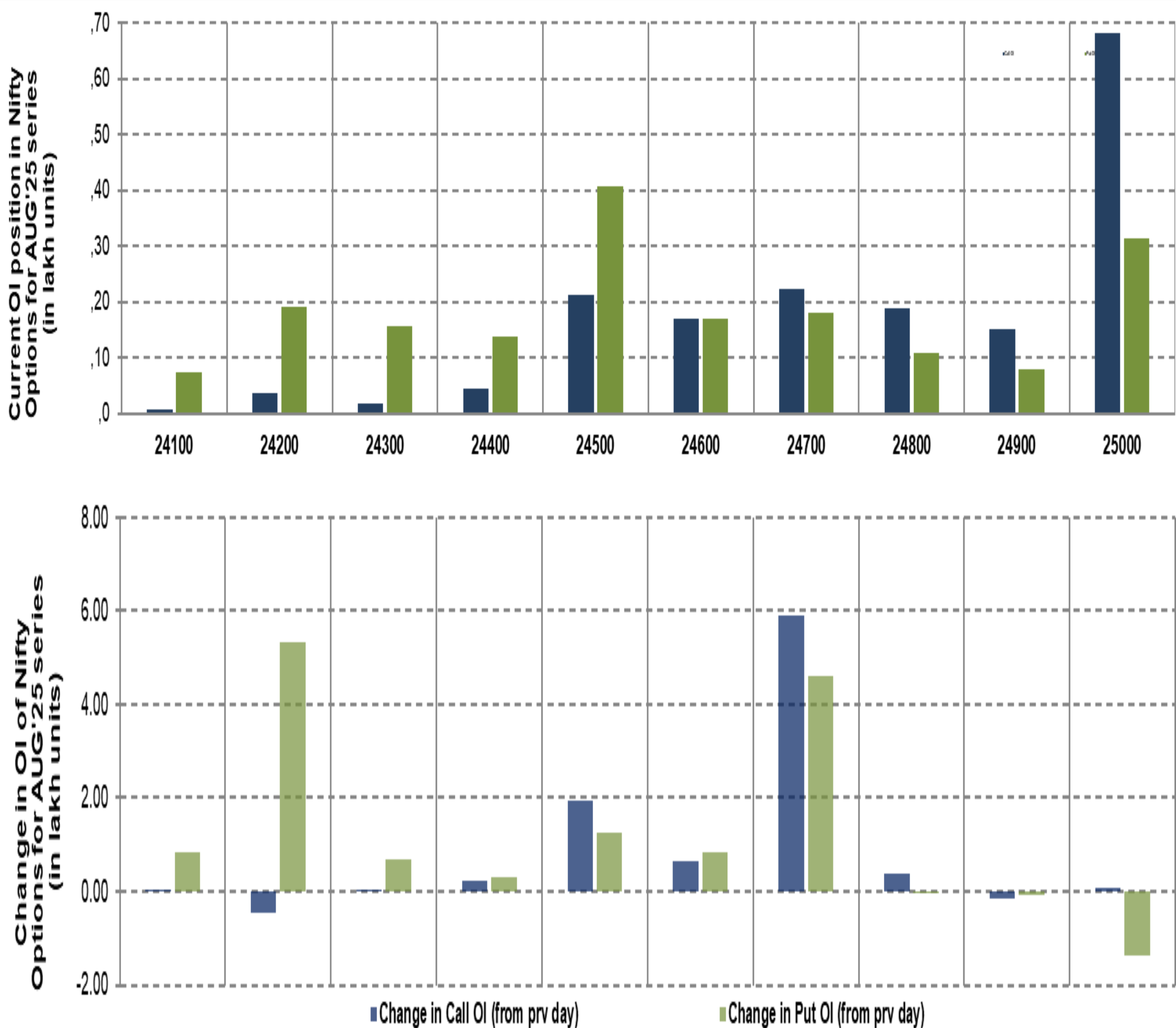




# TECHNICAL VIEWS



## NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.59 million in Open Interests is **Strike Price of 24700**
- **Most Active Nifty Put** with an addition of 0.46 millions in Open Interests is **Strike Price of 24700**
- **Maximum Open Interest an outstanding** was 6.83 millions for Calls at **Strike Price of 25000**
- **Maximum Open Interest an outstanding** was 4.06 millions for puts at **Strike Price of 24500**

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