



# MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

Aug 20, 2025



Indian equity benchmarks continued their winning streak for fifth straight day ahead of weakly F&O expiry. After making a cautious start, soon markets traded in green and remained higher throughout the session. Sentiments remained upbeat after parliamentary panel pitched for raising the investment rate from 31% of the Gross Domestic Product (GDP) to 35% in order to achieve the ambitious growth target of 8%.

Some of the important factors in today's trade:

Proposed 2-tier GST structure could lower effective tax rate, boost revenues in long term: Some support came as S&P Global Ratings Director YeeFarn Phua said that the proposed 2-tier GST structure could lower effective taxation rate and boost fiscal revenues over the longer term.

India, China unveil raft of measures to fully realise their development potential: Some support also came as India and China have unveiled a series of measures for a stable, cooperative and forward-looking relationship that included jointly maintaining peace along the frontier, reopening border trade, promoting investment flows, and resuming direct flight connectivity at the earliest.

India, US negotiating agreement to liberalise trade in goods, non-sensitive agri products: Traders took note of Minister of State for Commerce and Industry Jitin Prasada's statement that India and the US are negotiating a multi-sector bilateral trade agreement and as a part of the negotiations, both sides are discussing liberalisation of trade in goods, including non-sensitive agricultural products.

Global front: European markets were trading mostly in green, while Asian markets ended mostly in green as investors kept a close eye on ongoing Ukraine peace talks and looked ahead to Fed Chair Jerome Powell's Jackson Hole speech due this week for more clarity on September rate cuts.

# MARKET SELFIE



## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	81857.84	213.45	0.26
NIFTY	25050.55	69.90	0.28
MIDCAP	46049.66	179.62	0.39
SMLCAP	53180.53	159.10	0.30
BSEFMC	20847.09	280.24	1.36
HEALTHCARE	44497.23	-92.31	-0.21
AUTO	57006.37	-44.01	-0.08
POWER	6654.77	34.65	0.52
REALTY	7092.01	72.87	1.04
BSE IT	35030.98	890.54	2.61
BANKEX	62061.05	-208.55	-0.33
OIL GAS	26389.22	-41.61	-0.16
METAL	31658.57	153.15	0.49
INDIA VIX	11.78	-0.00	-0.04

## ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1711	1263	88
BSE	2270	1815	156

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	6902	7208	(4)
NSE CASH	96171	87635	10
NSE F&O	150041	128860	16

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	22	3.37	1.33
SENSEX	22.96	4.35	1.16

# KEY NUMBERS TRACKER



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

FII-DII*	Buy	Sell	Net
DII	13950	12264	1686
FII	11460	12499	(1039)

Note: FPI & DII Figures are provisional

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

FII	Buy	Sell	Net
Ind. Futures	2085.20	2408.51	(323)
Ind. Options	972726.44	987291.72	(14565)
Stk. Futures	20779.36	21846.93	(1068)
Stk. Options	33063.27	32878.29	185

## PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.11	1.09
BANK NIFTY	0.71	0.78

## DOLLAR INDEX

Dollar Index	Current	Previous	% Change
DXY	98.15	98.27	-0.12

## 10-YEARS G-SEC YIELD

Country	Current	Previous	% Change
INDIA	6.497	6.512	-0.01
USA	4.275	4.307	-0.02

## KEY COMMODITIES TRACKER (in \$)

Commodity	Current	Change Points	% Change
Gold	3346.15	31.98	0.97
Silver	37.79	0.43	1.14
Crude-Oil	62.76	0.27	0.43
Brent-Crude	66.88	0.94	1.42

# CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES				
Expiry		Close	Change Points	% Change
26 AUG-25	USD-INR	87.09	0.03	0.04
26 AUG-25	EUR-INR	101.46	-0.31	-0.30
26 AUG-25	GBP-INR	117.52	-0.18	-0.15
26 AUG-25	JPY- INR	59.08	0.00	0.00

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS						
Index	Close	S2	S1	Pivot	R1	R2
NIFTY	25051	24864	24957	25023	25116	25182
SENSEX	81858	81288	81573	81779	82064	82270
NIFTY FUTURES	25083	24902	24993	25050	25141	25199
BANK NIFTY	55699	55461	55580	55696	55815	55931
CNX IT	35690	34244	34967	35370	36093	36497
CNX MIDCAP	57931	57343	57637	57823	58117	58303
CNX SMALLCAP	17968	17820	17894	17939	18013	18058
INDIA VIX	11.78	9.51	10.64	11.32	12.45	13.13

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

SECURITIES BAN IN F&O TRADES FOR 20-08-2025
TITAGARH, RBLBANK , PGEL

# TECHNICAL VIEWS



## NIFTY

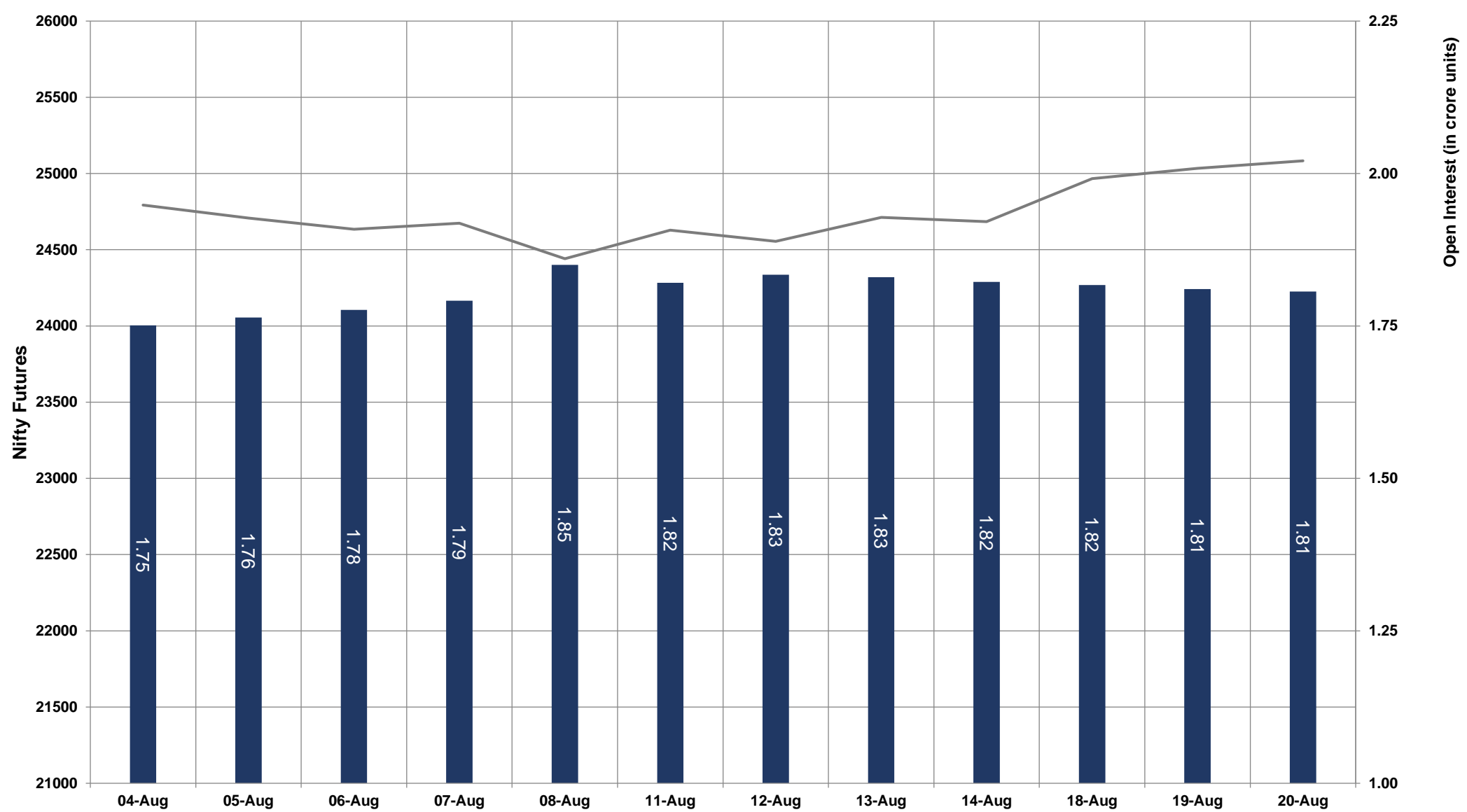


- Nifty Cash = **25050.55 (0.20%)**
- Resistance levels = **25150** and **25270**
- Support levels = **24900** and **24850**

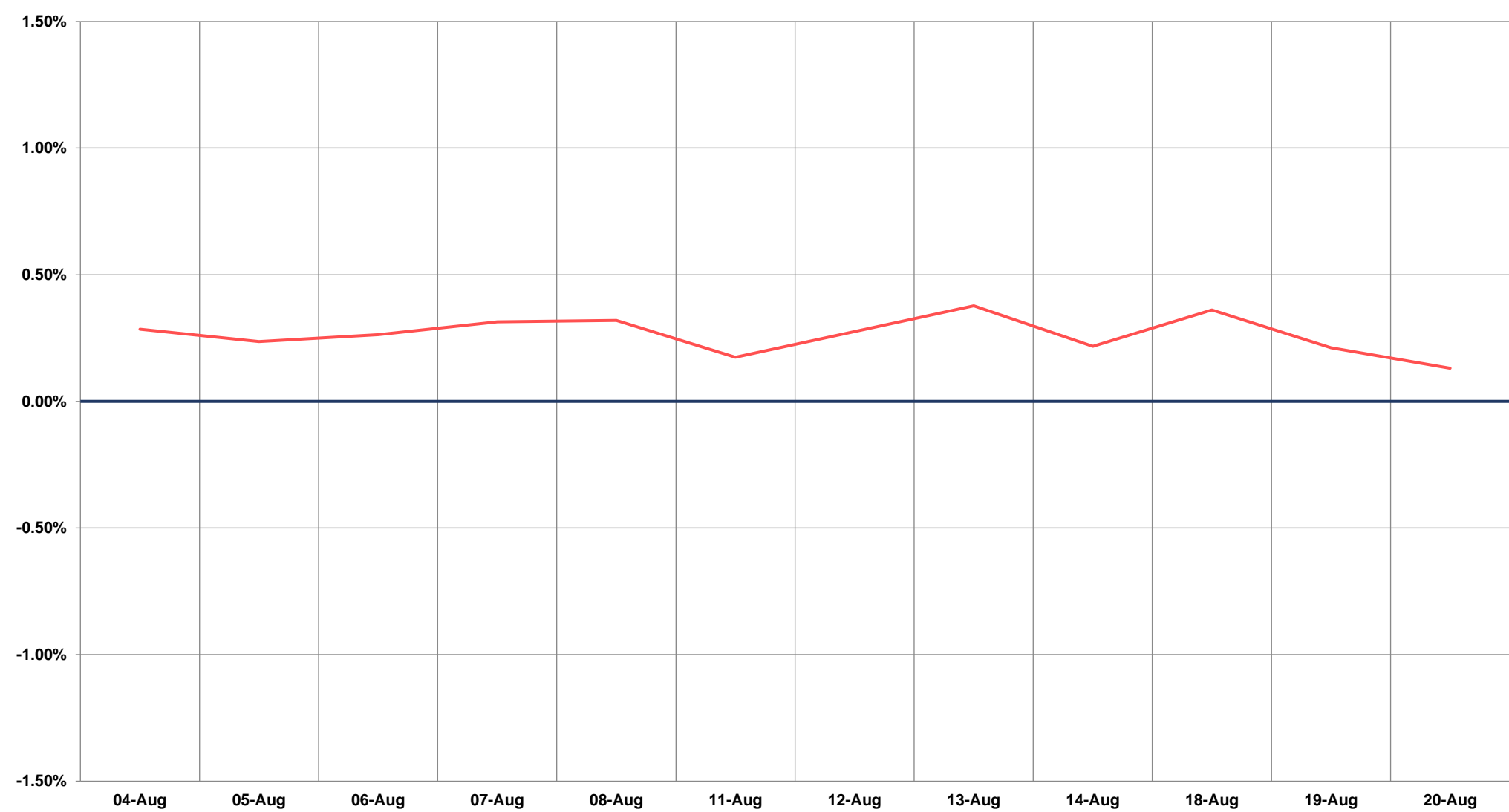
# TECHNICAL VIEWS



## NIFTY FUTURES



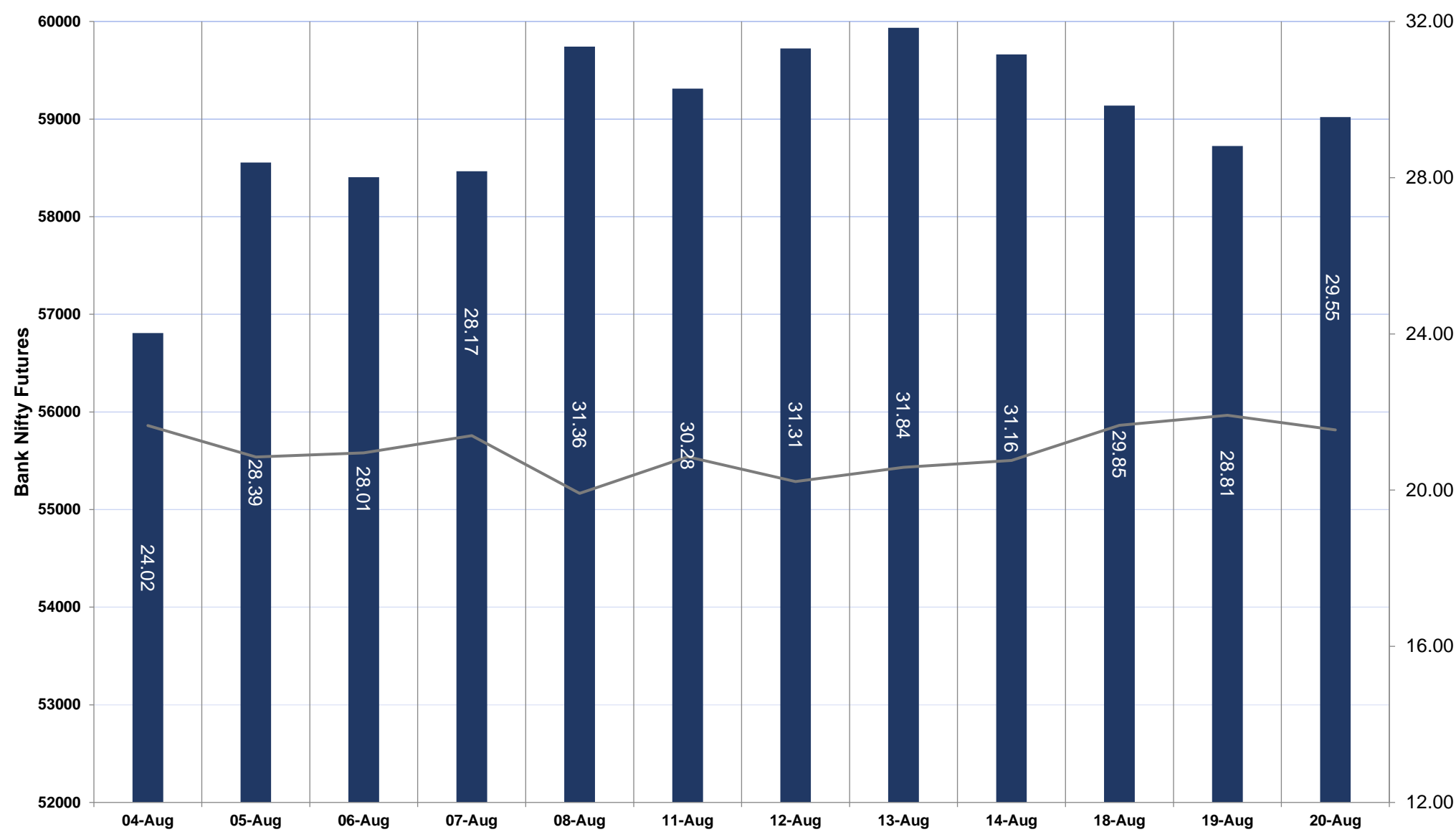
## SPREAD: FUTURE & SPOT



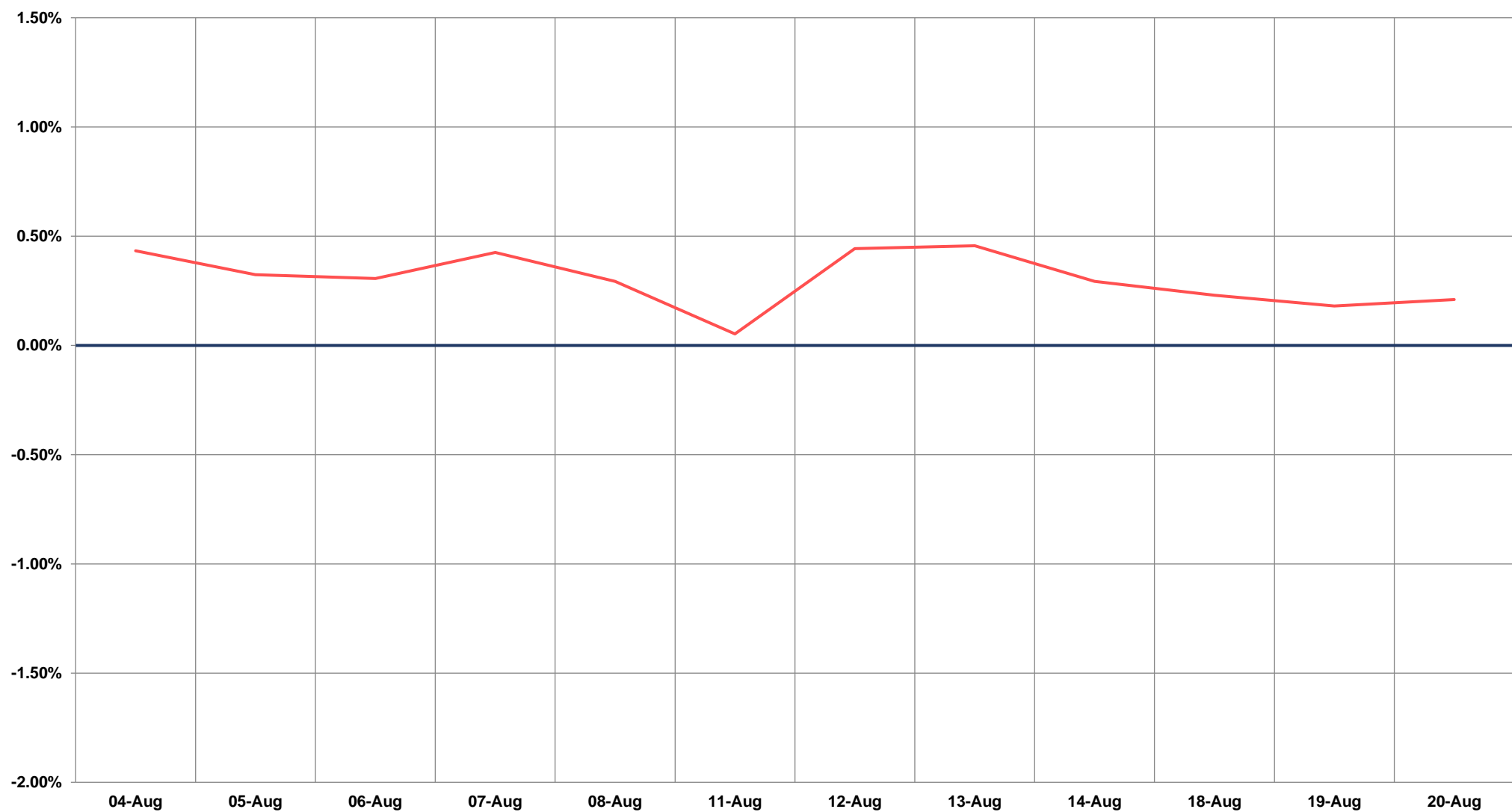
# TECHNICAL VIEWS



## BANK NIFTY FUTURES



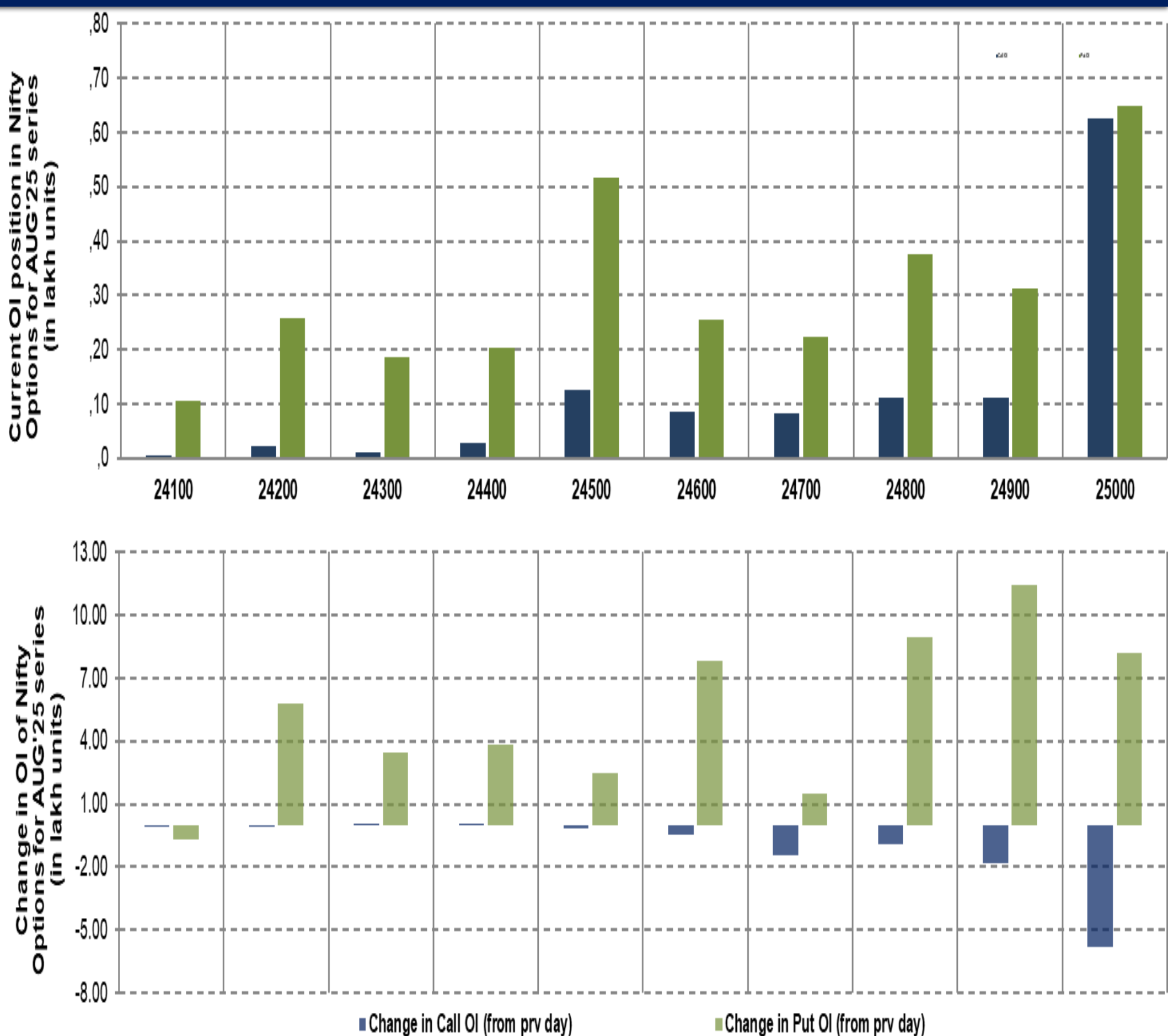
## SPREAD: FUTURE & SPOT



# TECHNICAL VIEWS



## NIFTY OPTIONS



- **Most Active Nifty Call** with an subtraction of -0.58 million in Open Interests is **Strike Price of 25000**
- **Most Active Nifty Put** with an addition of 1.14 millions in Open Interests is **Strike Price of 24900**
- **Maximum Open Interest an outstanding** was 6.25 millions for Calls at **Strike Price of 25000**
- **Maximum Open Interest an outstanding** was 6.48 millions for puts at **Strike Price of 25000**

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