



MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

Aug 21, 2025



Indian equity benchmarks ended higher for the sixth consecutive session on the weekly F&O expiry day. Index made a slightly positive start and remained higher throughout day, as traders took support with a survey showed India's private sector activity expanded at the fastest pace on record in August, powered by a historic surge in demand led by the dominant services sector, which allowed firms to hike prices at the fastest clip in over 12 years. In last leg of trade, markets erased some of their gains, but ended above neutral lines.

Some of the important factors in today's trade:

India's flash composite PMI surges to 65.2 in August: Sentiments remained upbeat as HSBC's flash India Composite Purchasing Managers' Index (PMI), compiled by S&P Global, rocketed to 65.2 in August from 61.1 last month.

EPFO registers record net addition of nearly 22 lakh members in June: Some support also came as the Labour Ministry in its latest payroll data has showed that retirement fund body Employees' Provident Fund Organisation's (EPFO) recorded a 13.46% year-on-year growth in net member addition of 21.89 lakh in June.

Exports of major textile commodities increase 5.37% to \$3.10 billion in July 2025: Traders took note of Textile Ministry's statement that exports of major textile commodities increased 5.37 per cent to \$3.10 billion in July 2025 compared to \$2.94 billion in the year-ago period, despite global uncertainties.

Global front: European markets were trading in red after HCOB's latest Purchasing Managers' Index (PMI) Survey showed a decline in services sector activity. Asian markets ended mixed as investors awaited policy signals from Federal Reserve Chair Jerome Powell.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	82000.71	142.87	0.17
NIFTY	25083.75	33.20	0.13
MIDCAP	45993.82	-55.84	-0.12
SMLCAP	53186.03	5.50	0.01
BSEFMC	20737.17	-109.92	-0.53
HEALTHCARE	44767.20	269.97	0.61
AUTO	56774.62	-231.75	-0.41
POWER	6592.09	-62.68	-0.92
REALTY	7124.60	32.59	0.46
BSE IT	35040.35	9.37	0.03
BANKEX	62134.84	73.79	0.12
OIL GAS	26438.40	49.18	0.19
METAL	31636.05	-22.52	-0.07
INDIA VIX	11.37	-0.41	-3.50

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1502	1473	90
BSE	2039	2058	160

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	16671	6902	142
NSE CASH	97001	96171	1
NSE F&O	170295	150041	13

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	22.03	3.37	1.34
SENSEX	23.00	4.36	1.16

KEY NUMBERS TRACKER



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

FII-DII*	Buy	Sell	Net
DII	12575	11348	1226
FII	11799	13003	(1204)

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)

FII	Buy	Sell	Net
Ind. Futures	4141.88	3171.73	970
Ind. Options	2012970.02	2010886.39	2084
Stk. Futures	21345.67	22330.05	(984)
Stk. Options	28525.57	28205.92	320

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.01	1.11
BANK NIFTY	0.70	0.71

DOLLAR INDEX

Dollar Index	Current	Previous	% Change
DXY	98.57	98.22	0.36

10-YEARS G-SEC YIELD

Country	Current	Previous	% Change
INDIA	6.525	6.497	0.02
USA	4.329	4.275	0.03

KEY COMMODITIES TRACKER (in \$)

Commodity	Current	Change Points	% Change
Gold	3339.66	-7.22	-0.21
Silver	38.08	0.17	0.44
Crude-Oil	63.37	0.54	0.86
Brent-Crude	67.52	0.59	0.88

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES				
Expiry		Close	Change Points	% Change
26 AUG-25	USD-INR	87.25	0.16	0.18
26 AUG-25	EUR-INR	101.70	0.19	0.18
26 AUG-25	GBP-INR	117.52	-0.04	-0.03
26 AUG-25	JPY- INR	59.28	0.19	0.32

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS						
Index	Close	S2	S1	Pivot	R1	R2
NIFTY	25084	24999	25041	25097	25140	25196
SENSEX	82001	81741	81871	82051	82181	82361
NIFTY FUTURES	25123	25036	25079	25129	25172	25222
BANK NIFTY	55755	55534	55645	55819	55930	56105
CNX IT	35724	35242	35483	35703	35944	36164
CNX MIDCAP	57709	57342	57526	57865	58048	58388
CNX SMALLCAP	17966	17856	17911	18009	18064	18162
INDIA VIX	11.37	9.32	10.34	11.12	12.14	12.92

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 21-08-2025
RBLBANK , PGEL

TECHNICAL VIEWS



NIFTY

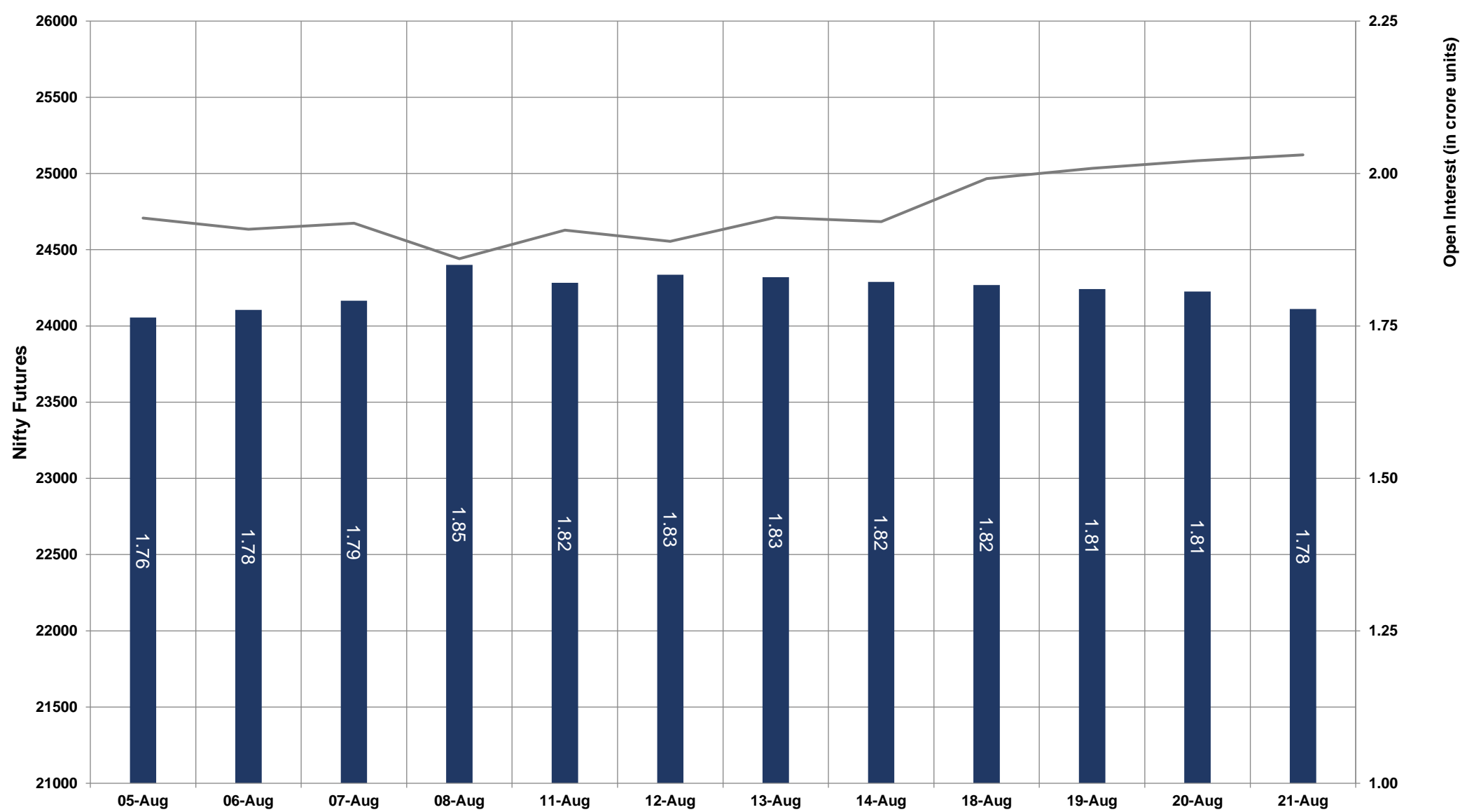


- Nifty Cash = **25083.75 (0.13%)**
- Resistance levels = **25200** and **25330**
- Support levels = **24960** and **24880**

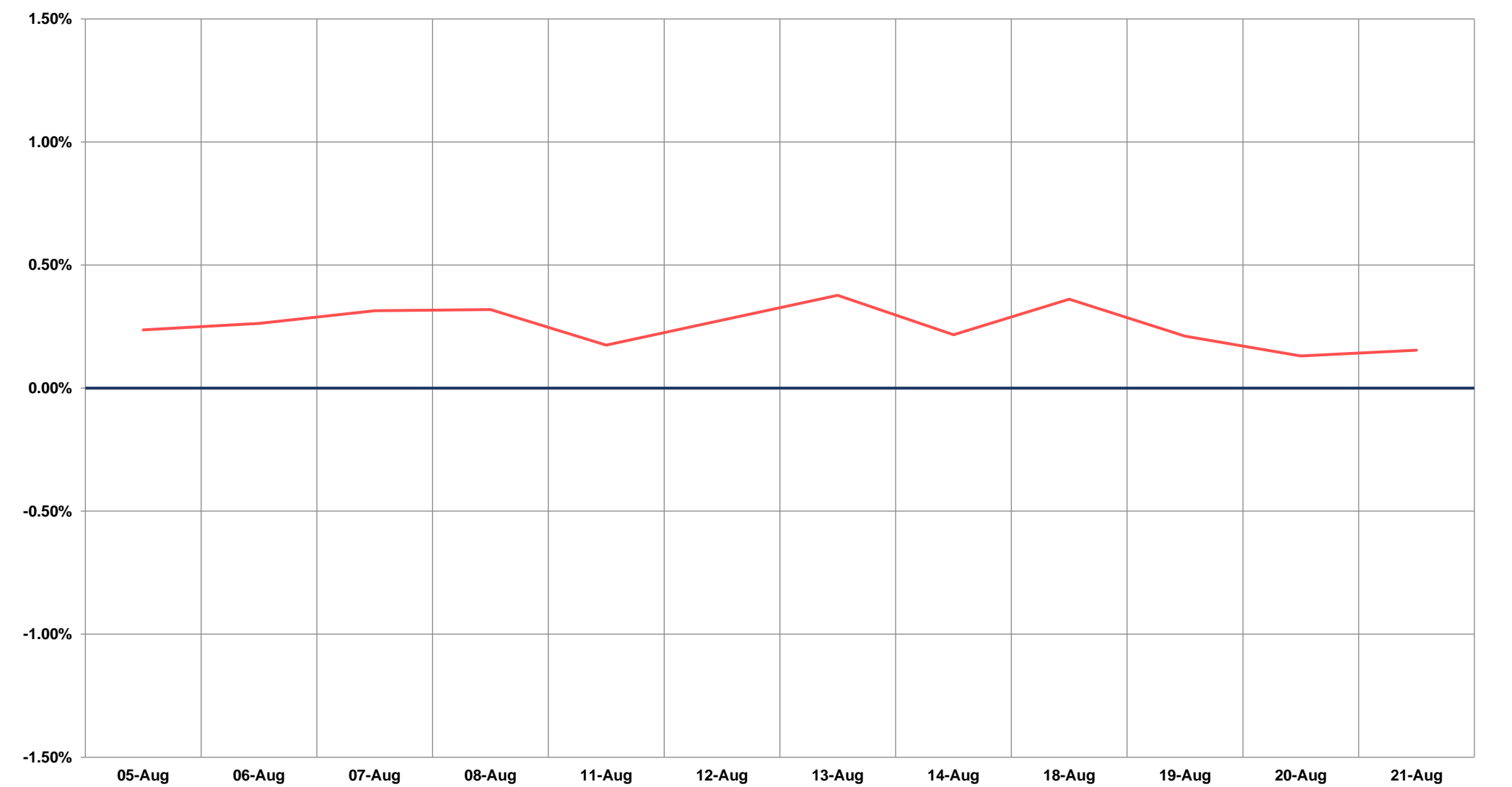
TECHNICAL VIEWS



NIFTY FUTURES



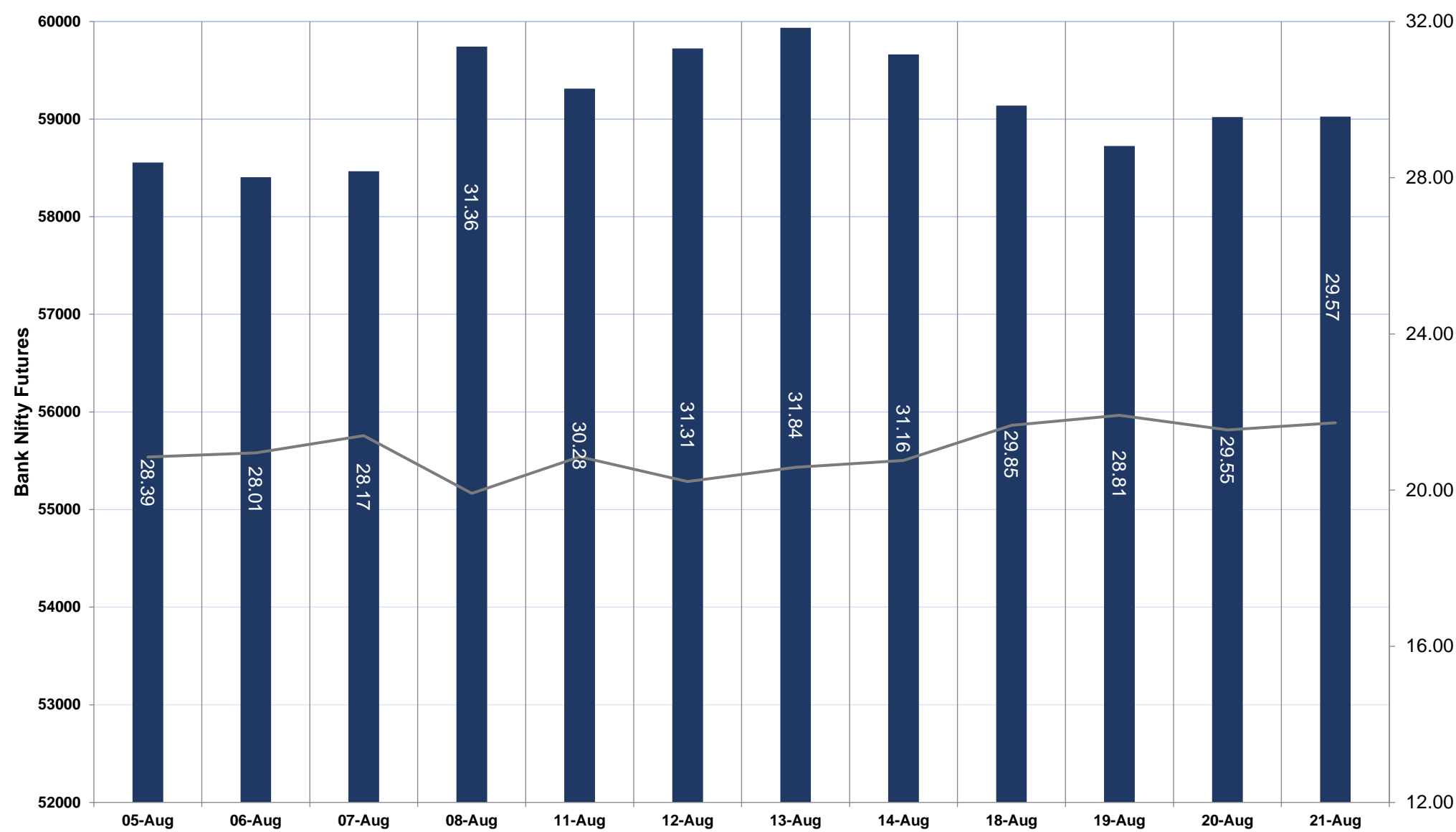
SPREAD: FUTURE & SPOT



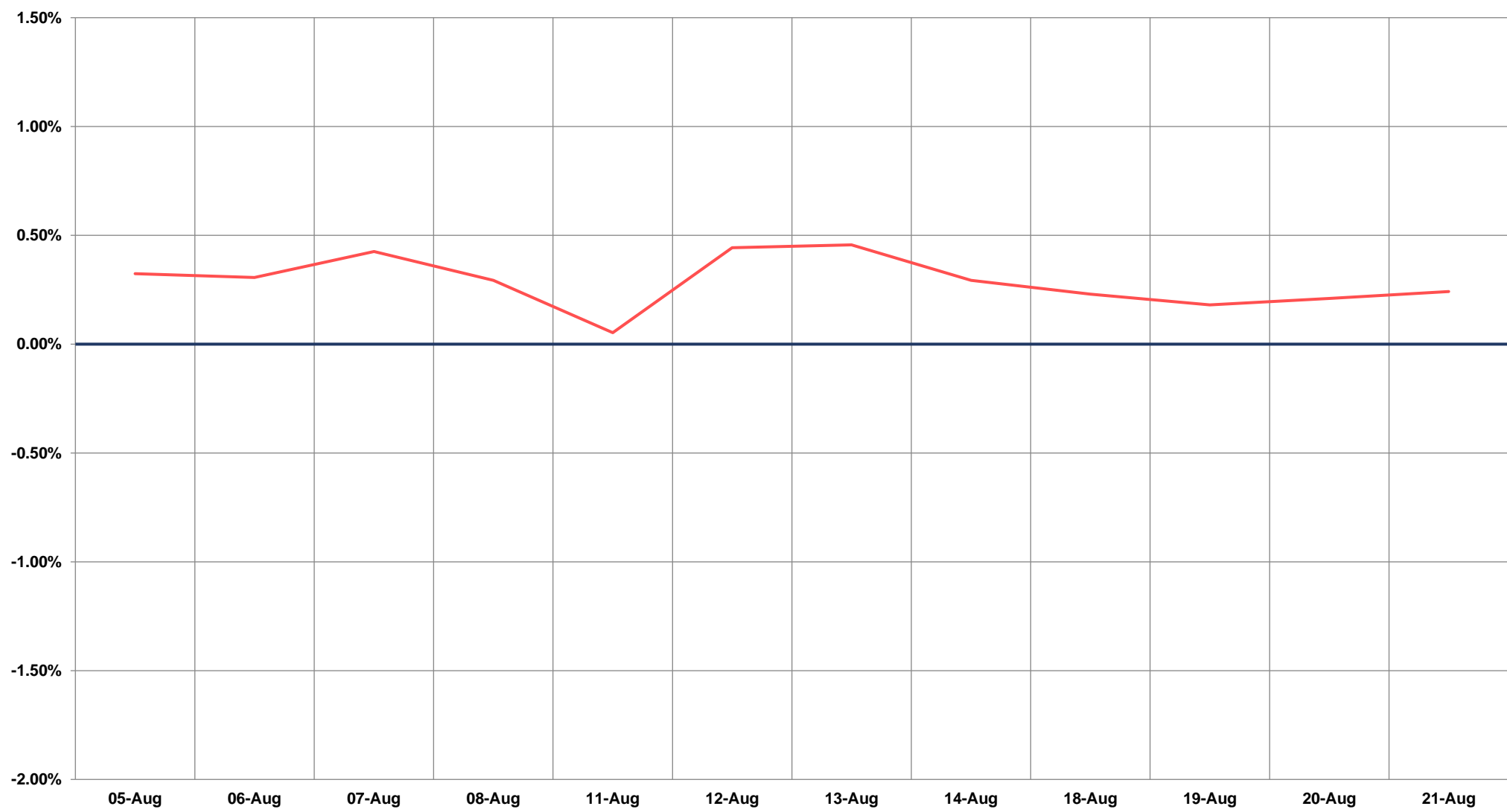
TECHNICAL VIEWS



BANK NIFTY FUTURES



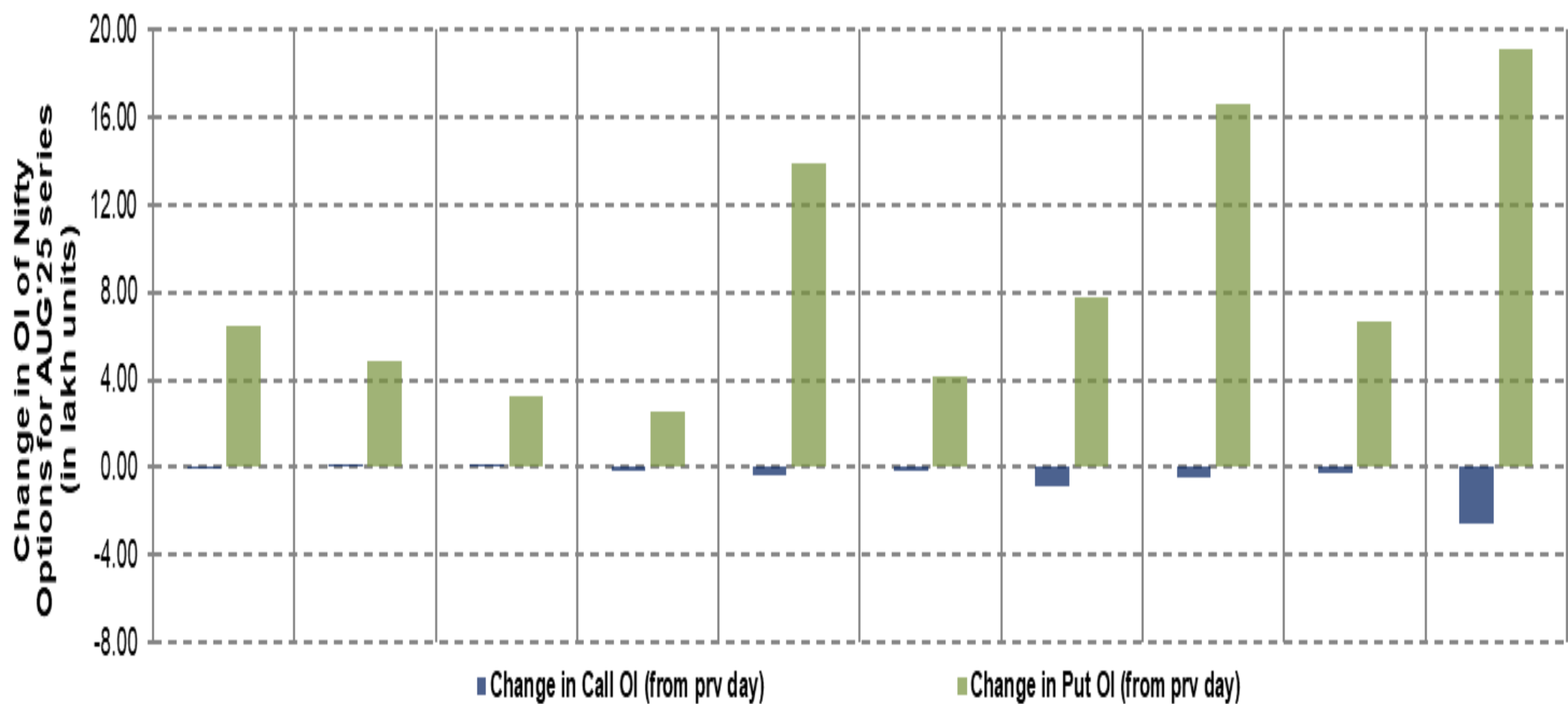
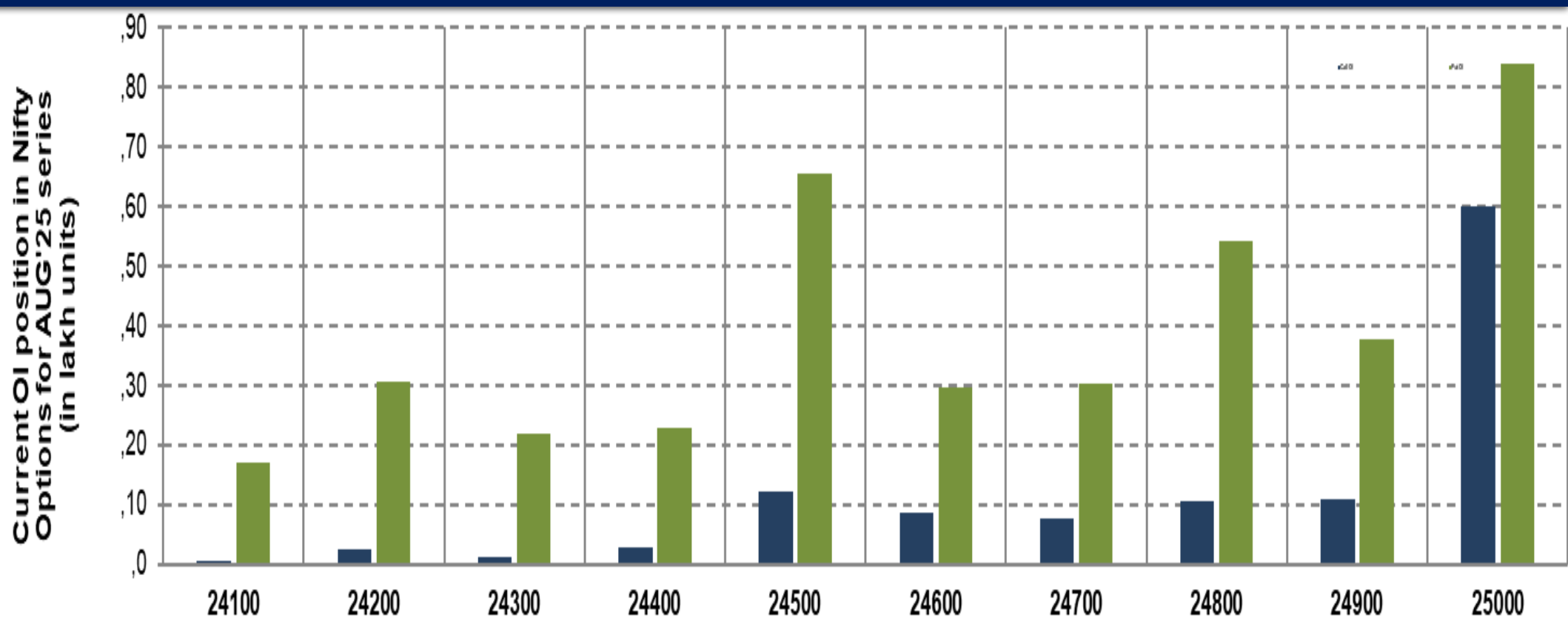
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an subtraction of -0.25 million in Open Interests is **Strike Price of 25000**
- **Most Active Nifty Put** with an addition of 1.91 millions in Open Interests is **Strike Price of 25000**
- **Maximum Open Interest an outstanding** was 5.99 millions for Calls at **Strike Price of 25000**
- **Maximum Open Interest an outstanding** was 8.40 millions for puts at **Strike Price of 25000**

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