



MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

Aug 22, 2025



Indian equity benchmarks halted their six-day winning streak on Friday, with both the Nifty and Sensex closing near the day's low points, weighed down by heavy selling in IT stocks and concerns over potential 50% tariff by the United States, set to take effect from August 27, 2025. Markets made a slightly negative start and extended losses throughout the session, as traders were cautious ahead of the US Federal Reserve Chair Jerome Powell's speech at the Jackson Hole symposium.

Some of the important factors in today's trade:

India's GDP likely to be lower at 6.3% in FY26: Traders remained cautious as SBI Research Report stated that India's economic growth is expected to be lower at 6.3 per cent in the fiscal year 2025-26 (FY26) compared to the Reserve Bank of India's (RBI's) projection of 6.5 per cent.

India-Russia ties among steadiest of major relationships globally: Traders paid no heed towards External Affairs Minister S Jaishankar said that India and Russia have been among the steadiest of the major relationships in the world since the Second World War.

Foreign funds inflow: Traders overlooked exchange data that showed Foreign Institutional Investors (FIIs) bought equities worth Rs 1,246.51 crore on Thursday.

Global front: European markets were trading mostly in green, while Asian markets ended mostly in green, amid investors awaited U.S. Federal Reserve Chair Jerome Powell's speech at the central bank's annual economic symposium, which could offer clues into the path of interest rates.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	81306.85	-639.86	-0.85
NIFTY	24870.10	-213.85	-0.85
MIDCAP	45890.28	-103.54	-0.23
SMLCAP	53002.32	-183.71	-0.35
BSEFMC	20522.15	-215.02	-1.04
HEALTHCARE	44807.68	40.48	0.09
AUTO	56669.76	-104.86	-0.18
POWER	6567.15	-24.94	-0.38
REALTY	7065.52	-59.08	-0.83
BSE IT	34768.87	-271.48	-0.77
BANKEX	61474.93	-659.91	-1.06
OIL GAS	26226.03	-212.37	-0.80
METAL	31233	-403.05	-1.27
INDIA VIX	11.72	0.35	3.12

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1177	1760	112
BSE	1662	2421	171

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	6724	16671	(60)
NSE CASH	82242	97001	(15)
NSE F&O	325387	170295	91

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	21.85	3.34	1.35
SENSEX	22.81	4.32	1.17

KEY NUMBERS TRACKER



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

FII-DII*	Buy	Sell	Net
DII	9805	10075	(270)
FII	9939	11591	(1652)

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)

FII	Buy	Sell	Net
Ind. Futures	4005.69	4663.41	(658)
Ind. Options	635309.78	637250.19	(1940)
Stk. Futures	131041.12	132811.00	(1770)
Stk. Options	29894.49	29699.67	195

PUT-CALL RATIO

Index	Current	Previous
NIFTY	0.61	1.01
BANK NIFTY	0.52	0.70

DOLLAR INDEX

Dollar Index	Current	Previous	% Change
DXY	97.73	98.62	-0.90

10-YEARS G-SEC YIELD

Country	Current	Previous	% Change
INDIA	6.549	6.525	0.02
USA	4.258	4.329	-0.07

KEY COMMODITIES TRACKER (in \$)

Commodity	Current	Change Points	% Change
Gold	3371.24	32.92	0.99
Silver	38.89	0.81	2.12
Crude-Oil	63.72	0.30	0.47
Brent-Crude	67.80	0.22	0.32

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES				
Expiry		Close	Change Points	% Change
26 AUG-25	USD-INR	87.53	0.27	0.30
26 AUG-25	EUR-INR	101.56	-0.16	-0.16
26 AUG-25	GBP-INR	117.52	-0.04	-0.04
26 AUG-25	JPY- INR	58.85	-0.39	-0.67

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS						
Index	Close	S2	S1	Pivot	R1	R2
NIFTY	24870	24712	24791	24938	25017	25164
SENSEX	81307	80829	81068	81531	81770	82233
NIFTY FUTURES	24898	24750	24824	24962	25036	25173
BANK NIFTY	55149	54690	54920	55332	55562	55975
CNX IT	35441	35189	35315	35541	35667	35893
CNX MIDCAP	57630	57401	57515	57692	57806	57983
CNX SMALLCAP	17920	17810	17865	17931	17985	18051
INDIA VIX	11.73	10.32	11.03	11.40	12.11	12.48

INDEX TREND ANALYSIS			
Index	Daily	Weekly	Monthly
NIFTY	Neutral	Neutral	Neutral
SENSEX	Neutral	Neutral	Neutral
NIFTY FUTURES	Neutral	Neutral	Neutral
BANK NIFTY	Sell	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 22-08-2025
TITAGARH ,RBLBANK , PGEL

TECHNICAL VIEWS



NIFTY

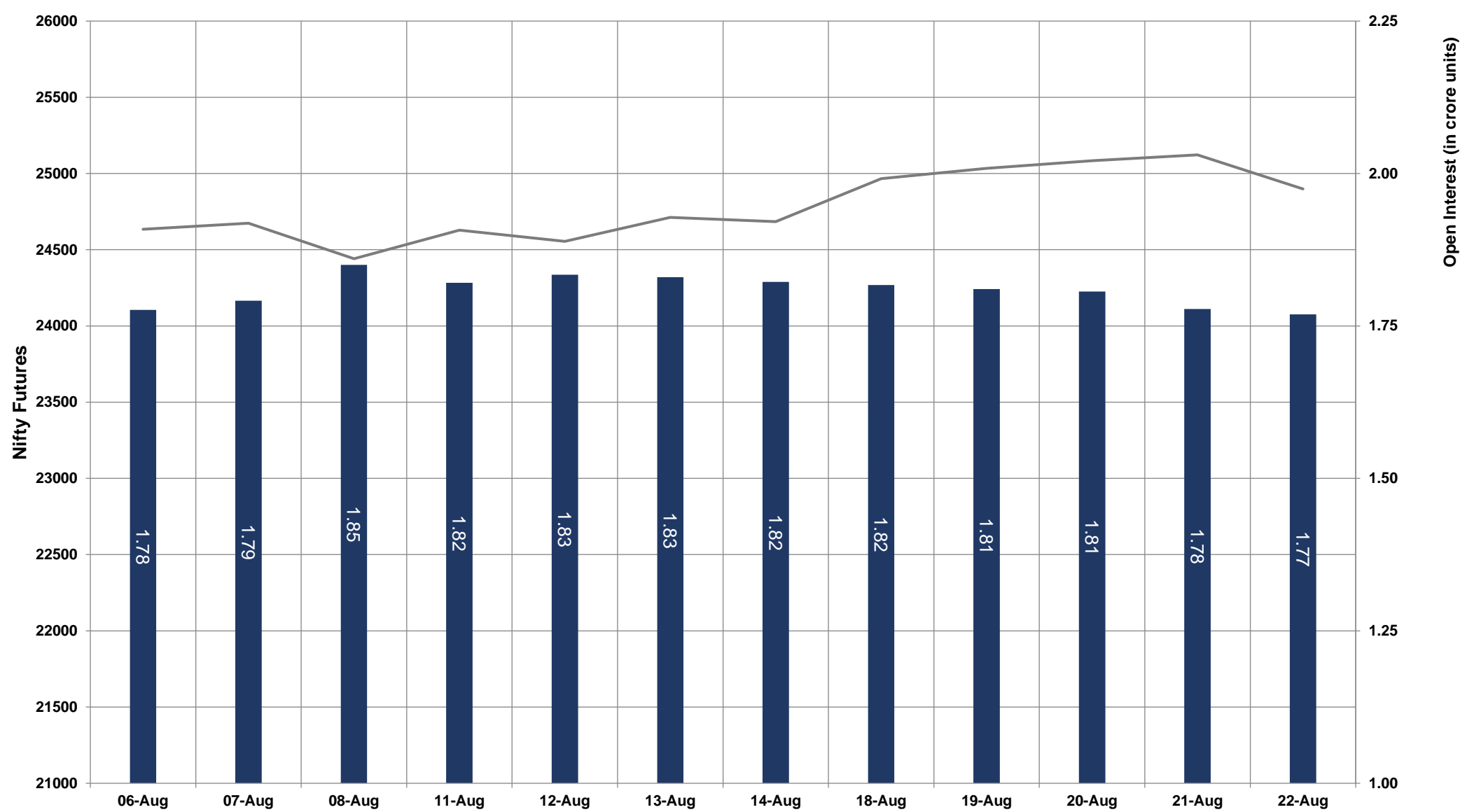


- Nifty Cash = **24870.10 (-0.85%)**
- Resistance levels = **25050** and **25200**
- Support levels = **24780** and **24650**

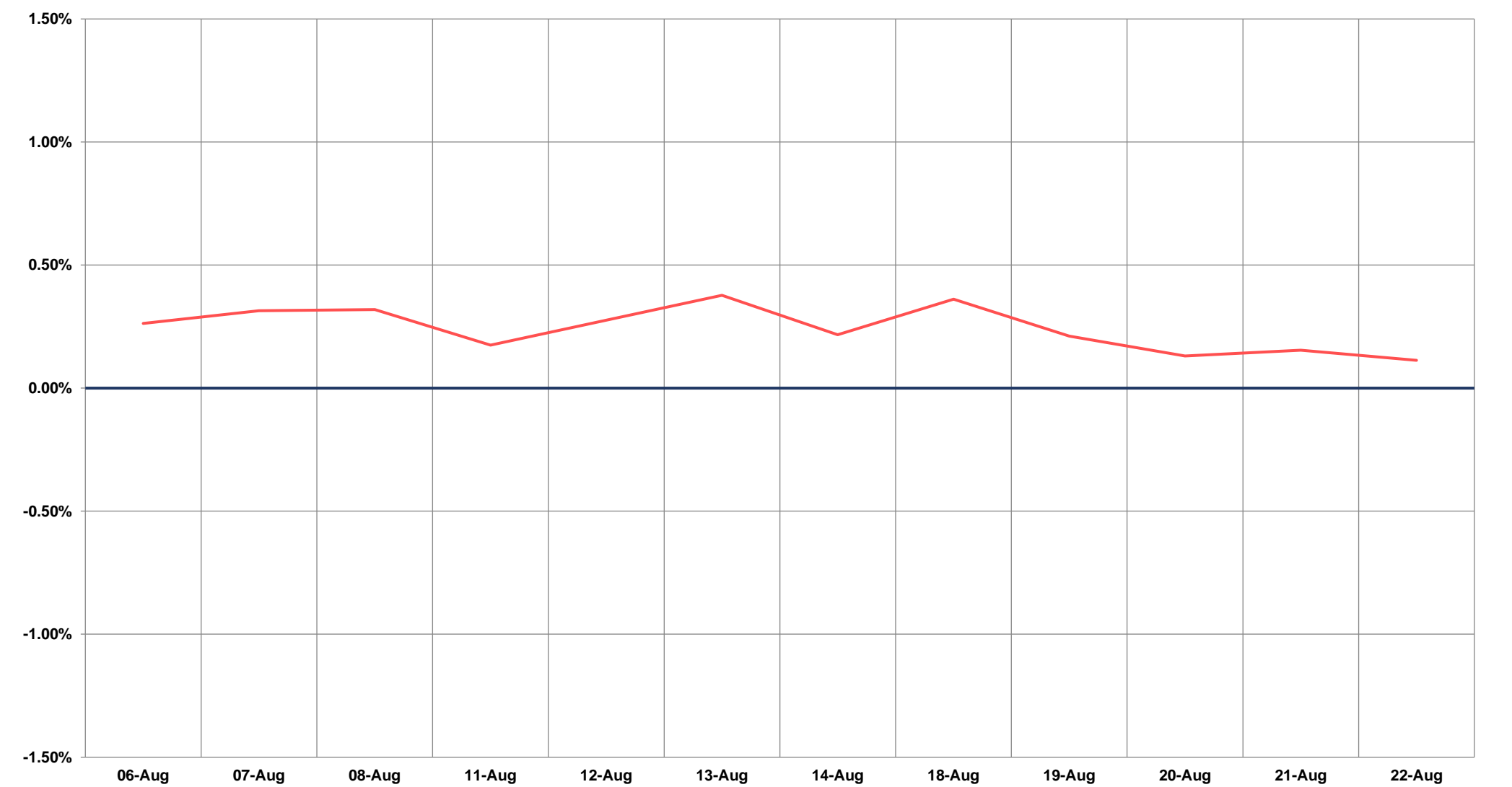
TECHNICAL VIEWS



NIFTY FUTURES



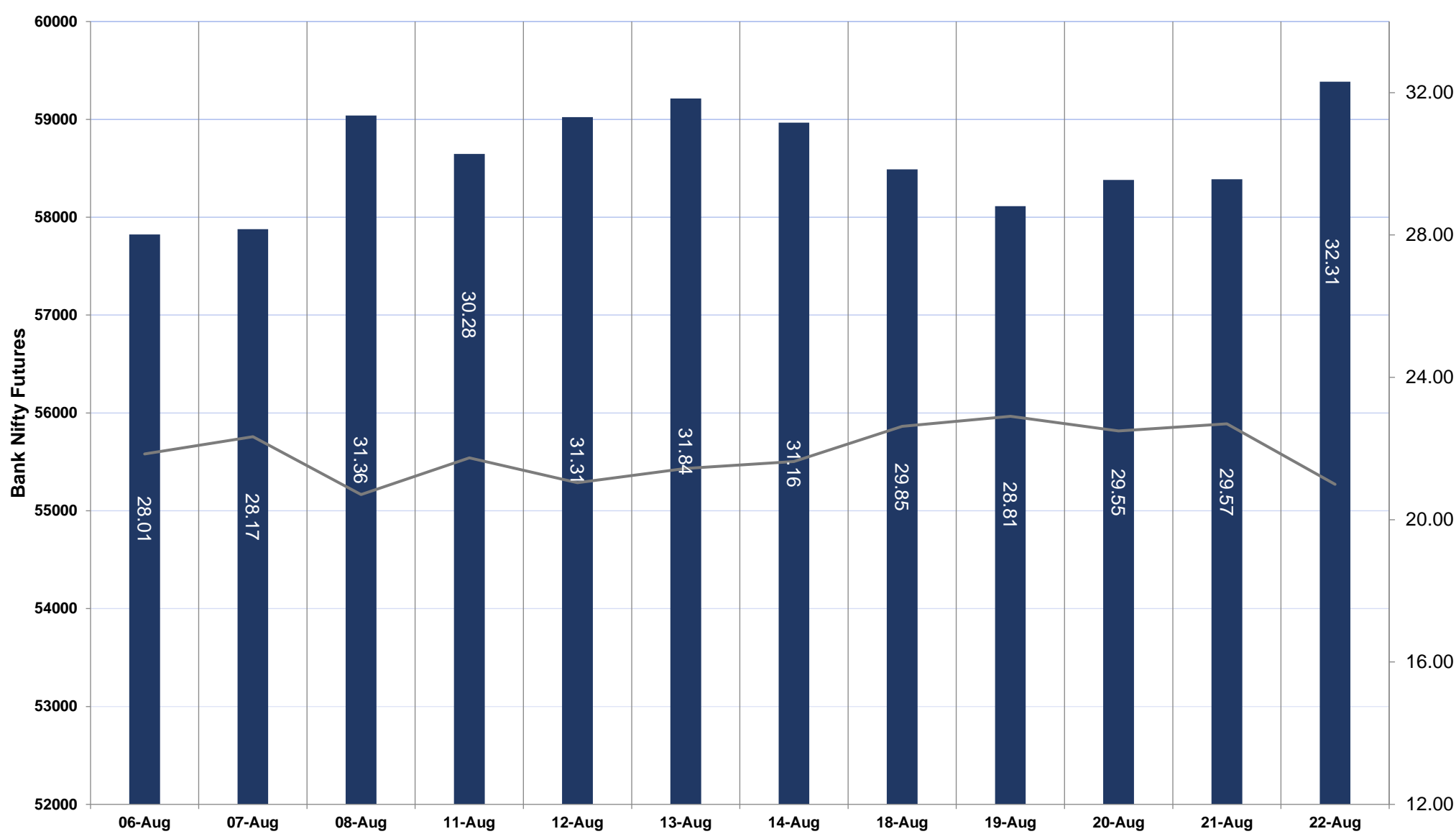
SPREAD: FUTURE & SPOT



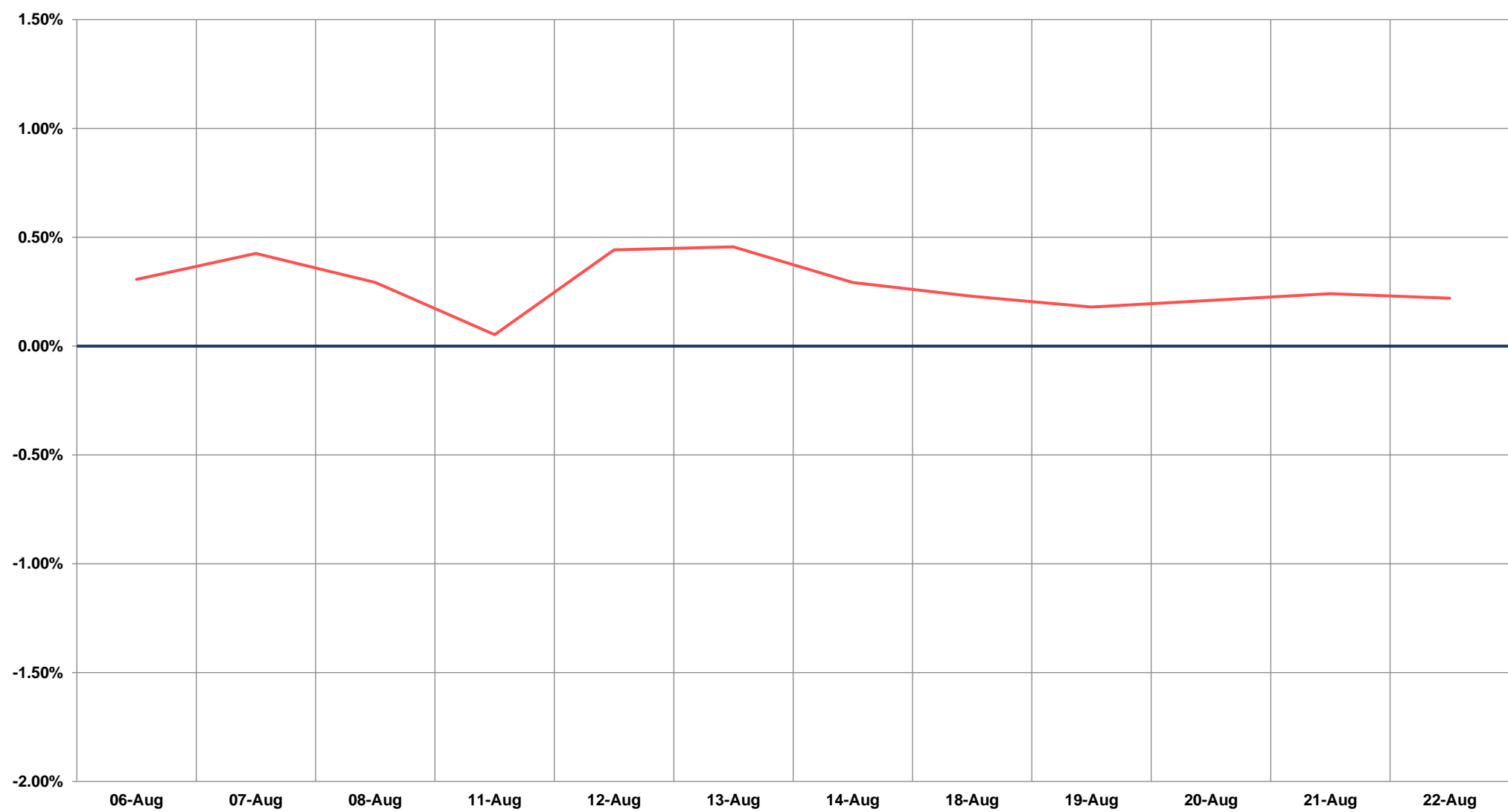
TECHNICAL VIEWS



BANK NIFTY FUTURES



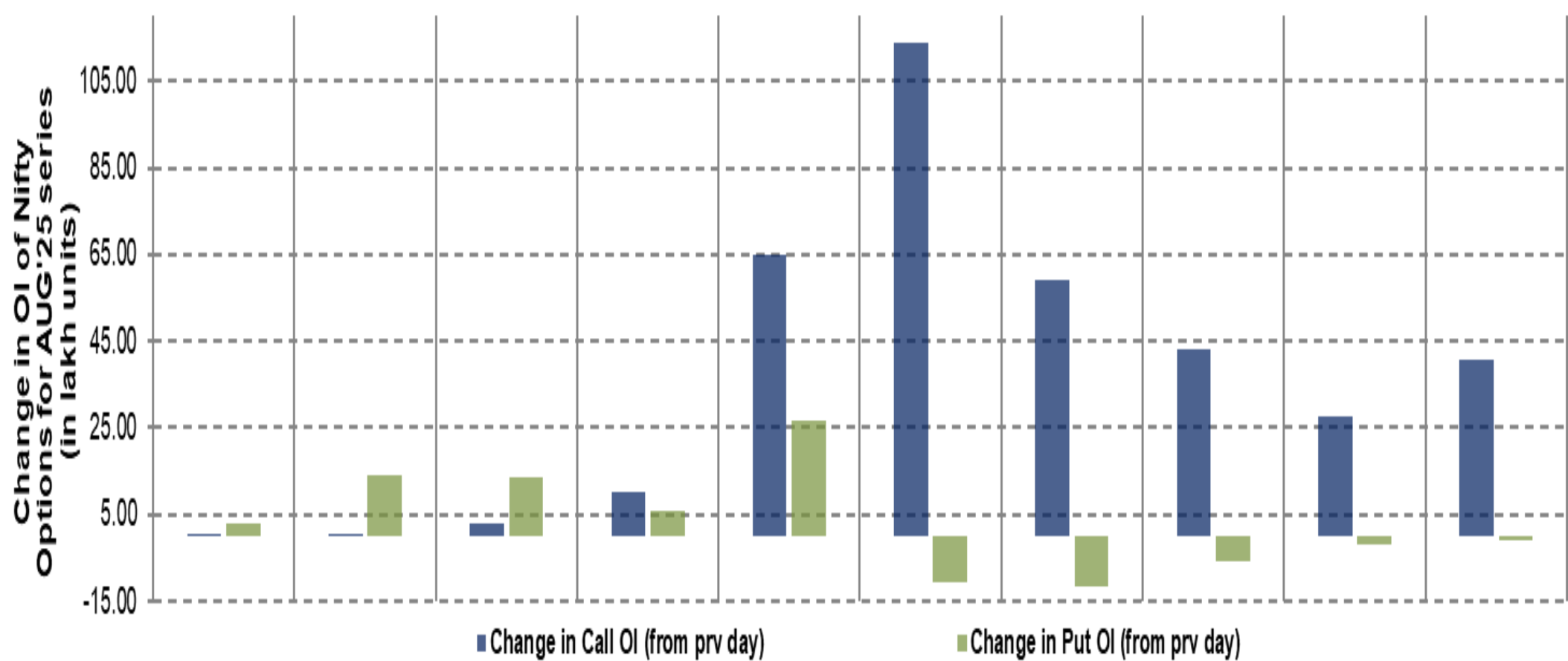
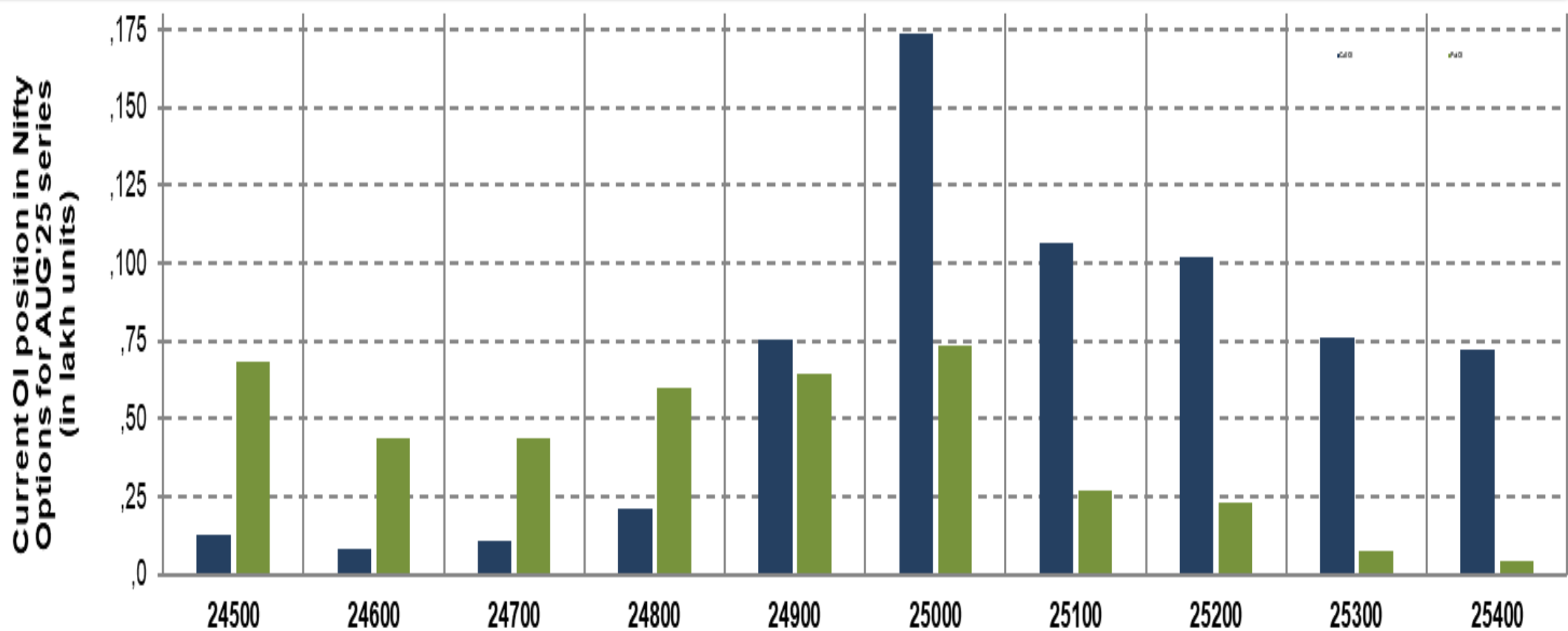
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of **11.38 million** in Open Interests is **Strike Price of 25000**
- **Most Active Nifty Put** with an addition of **2.67 millions** in Open Interests is **Strike Price of 24900**
- **Maximum Open Interest an outstanding** was **17.37 millions** for Calls at **Strike Price of 25000**
- **Maximum Open Interest an outstanding** was **7.33 millions** for puts at **Strike Price of 25000**

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