



MORNING MANTRA



Daily Derivatives & Market Report

June 17, 2025



Indian equity benchmarks erased early gains to end in negative territory on Tuesday amid continued tensions in West Asia. The ongoing Israel-Iran situation continued to influence investors' sentiments. After a slightly positive start, indices quickly slipped into the red and remained under pressure throughout the session, as market participants adopted a cautious approach ahead of the US Fed interest rate decision later this week. Some concern also came as exchange data showed foreign institutional investors (FIIs) offloaded equities worth Rs 2,539.42 crore on a net basis on Monday.

Some of the important factors in today's trade:

India's exports dip 2.17% to \$38.73 billion in May: Some cautiousness came as the government data showed that India's exports slipped into negative territory again, contracting 2.17 per cent year-on-year to \$38.73 billion in May due to a fall in petroleum goods' shipments, while trade deficit narrowed to \$21.88 billion during the month.

Unemployment rate rises to 5.6% in May: Traders were cautious as the government data showed that the rate of unemployment in the country, measured in monthly term, rose to 5.6 per cent in May from 5.1 per cent in April this year mainly due to seasonal variation.

Early rains dampen fuel demand growth in June: Provisional industry data showed that early rains in several parts of the country dampened fuel consumption in June, with diesel slipping to negative territory again after two months of growth.

Global front: European markets were trading in red on Tuesday after U.S. President Donald Trump urged residents of Tehran to 'immediately evacuate', signaling potential escalation of the conflict. Asian markets ended mostly in green on Tuesday, as Bank of Japan decided to maintain its interest rate and to reduce the amount of bond purchases from April next year.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	81583.30	-212.85	-0.26
NIFTY	24583.40	-93.10	-0.37
MIDCAP	45846.36	-258.86	-0.56
SMLCAP	53212.80	-360.51	-0.67
BSEFMC	20099.21	-63.12	-0.31
HEALTHCARE	43373.22	-803.57	-1.82
AUTO	52082.14	-295.88	-0.56
POWER	6746.51	-17.85	-0.26
REALTY	7865.04	-50.73	-0.64
BSE IT	38654.35	247.00	0.64
BANKEX	62867.29	-163.93	-0.26
OIL GAS	27240.99	-252.11	-0.92
METAL	30628.63	-399.50	-1.29
INDIA VIX	14.40	-0.43	-2.93

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	939	1946	76
BSE	1497	2482	139

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	8236	6744	22
NSE CASH	103109	91121	13
NSE F&O	124160	151447	(18)

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	22.34	3.62	1.16
SENSEX	22.82	4.20	1.05

KEY NUMBERS TRACKER



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

FII-DII*	Buy	Sell	Net
DII	18733	10936	7797
FII	13392	11776	1616

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)

FII	Buy	Sell	Net
Ind. Futures	3549.73	3155.86	394
Ind. Options	932409.19	924297.13	8112
Stk. Futures	15099.02	16439.63	(1341)
Stk. Options	72847.98	76097.84	(3250)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	0.95	1.14
BANK NIFTY	0.74	0.80

DOLLAR INDEX

Dollar Index	Current	Previous	% Change
DXY	98.12	98.00	0.12

10-YEARS G-SEC YIELD

Country	Current	Previous	% Change
INDIA	6.260	6.270	-0.18
USA	4.403	4.445	-1.06

KEY COMMODITIES TRACKER (in \$)

Commodity	Current	Change Points	% Change
Gold	3385.50	-17.60	-0.55
Silver	36.95	0.62	1.71
Crude-Oil	73.20	1.75	2.45
Brent-Crude	74.85	1.88	2.55

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES

Expiry	Close	Change Points	% Change
26 JUNE-25 USD-INR	86.29	0.2	0.23
26 JUNE-25 EUR-INR	99.81	0.04	0.04
26 JUNE-25 GBP-INR	117.03	0.07	0.06
26 JUNE-25 JPY- INR	59.71	-0.05	-0.09

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS

Index	Close	S2	S1	Pivot	R1	R2
NIFTY	24853	24715	24784	24883	24952	25051
SENSEX	81583	81170	81377	81633	81840	82097
NIFTY FUTURES	24869	24739	24804	24904	24969	25068
BANK NIFTY	55714	55385	55550	55808	55973	56232
CNX IT	39356	38757	39056	39278	39578	39799
CNX MIDCAP	58379	57869	58124	58557	58812	59245
CNX SMALLCAP	18420	18250	18335	18473	18558	18696
INDIA VIX	14.40	13.85	14.13	14.57	14.85	15.29

INDEX TREND ANALYSIS

Index	Daily	Weekly	Monthly
NIFTY	Neutral	Buy	Buy
SENSEX	Neutral	Buy	Buy
NIFTY FUTURES	Neutral	Buy	Buy
BANK NIFTY	Neutral	Buy	Buy
CNX IT	Buy	Neutral	Neutral
CNX MIDCAP	Neutral	Buy	Buy
CNX SMALLCAP	Neutral	Buy	Buy
INDIA VIX	Sell	Neutral	Neutral

SECURITIES BAN IN F&O TRADES FOR 17-06-2025

ABFRL, BSOFT, CDSL, CHAMBLFERT, HUDCO, IREDA, MANAPPURAM,
RBLBANK, TITAGARH

TECHNICAL VIEWS



NIFTY

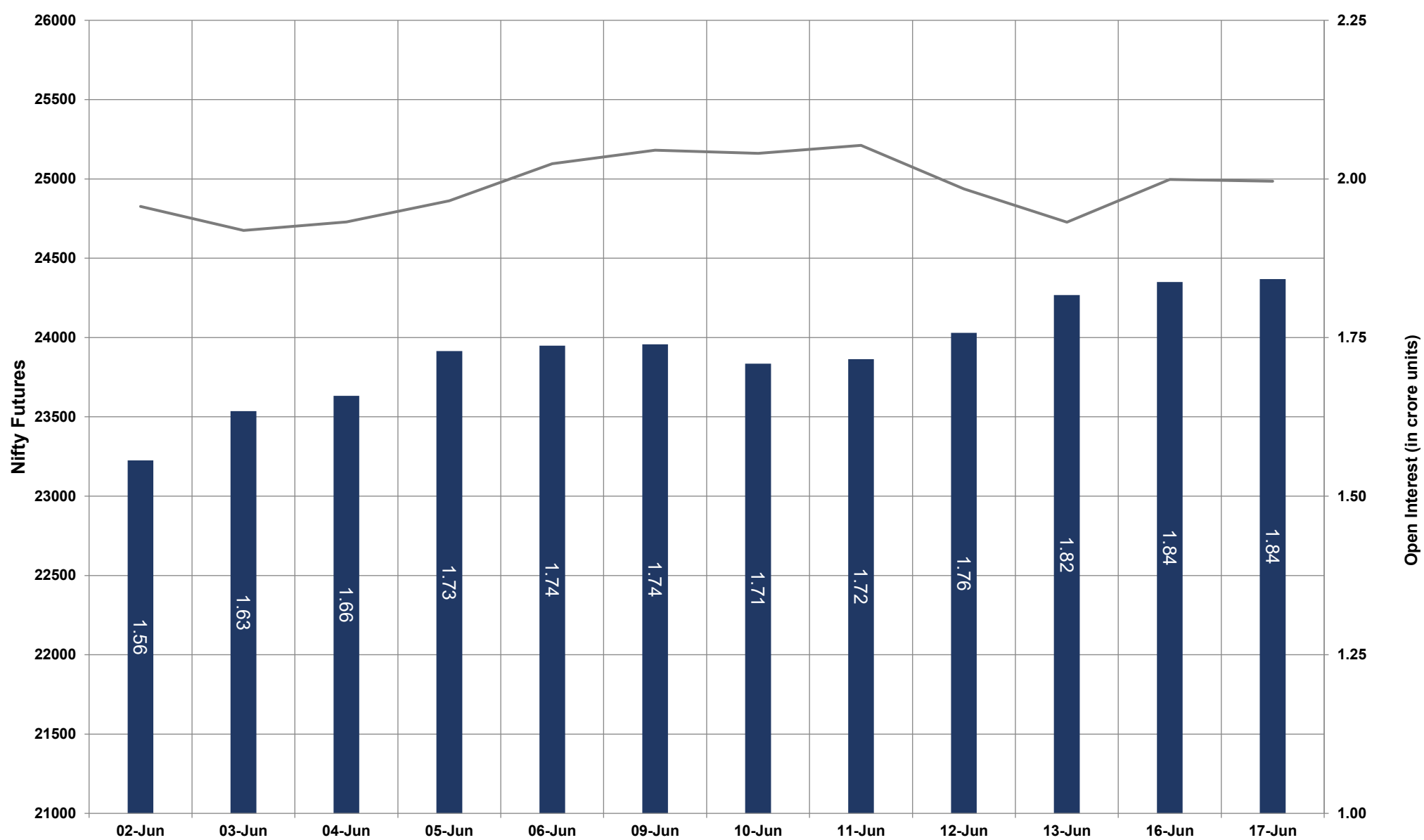


- Nifty Cash = **24853.50 (-0.37%)**
- Resistance levels = **25000** and **25100**
- Support levels = **24750** and **24600**

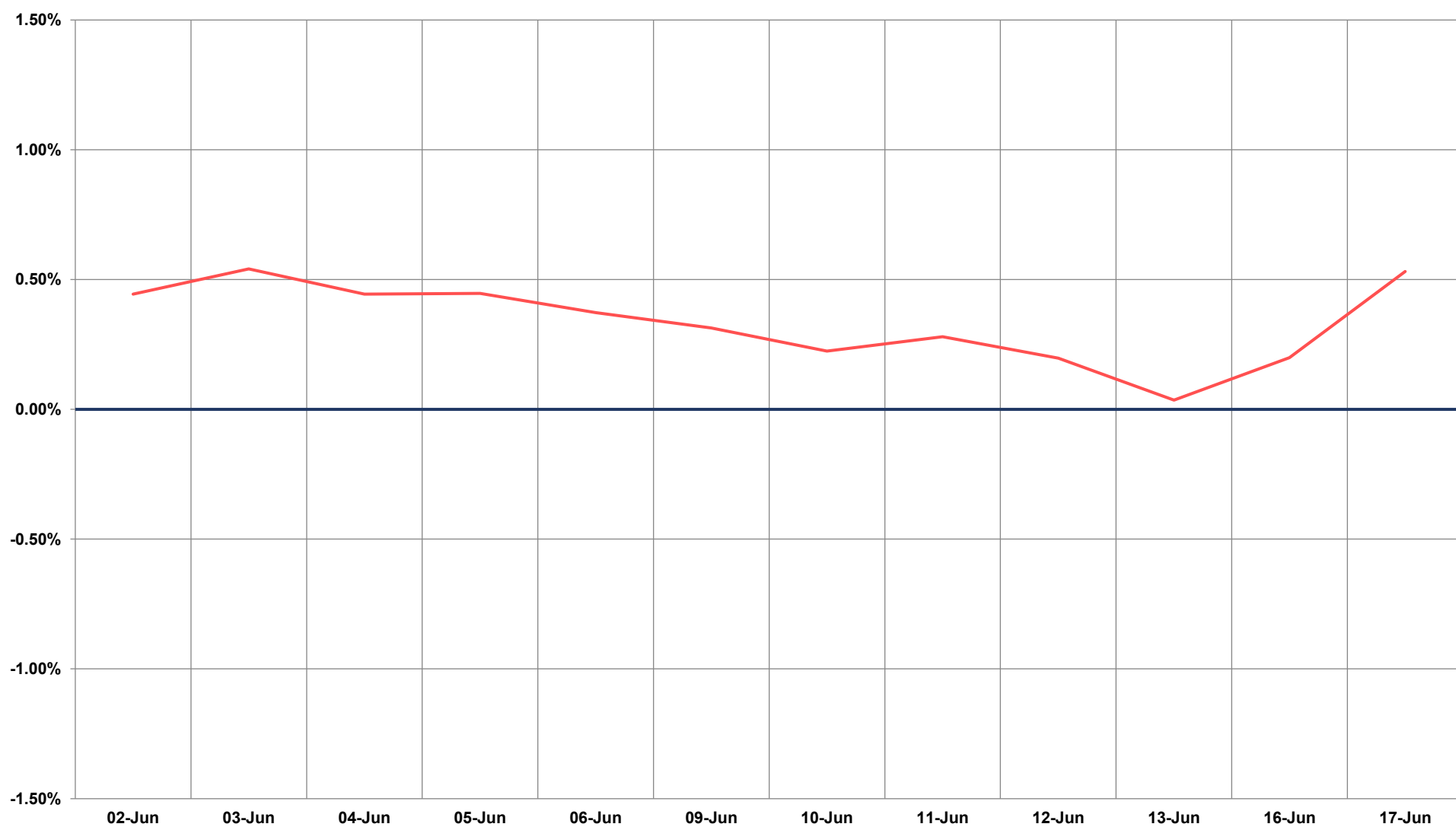
TECHNICAL VIEWS



NIFTY FUTURES



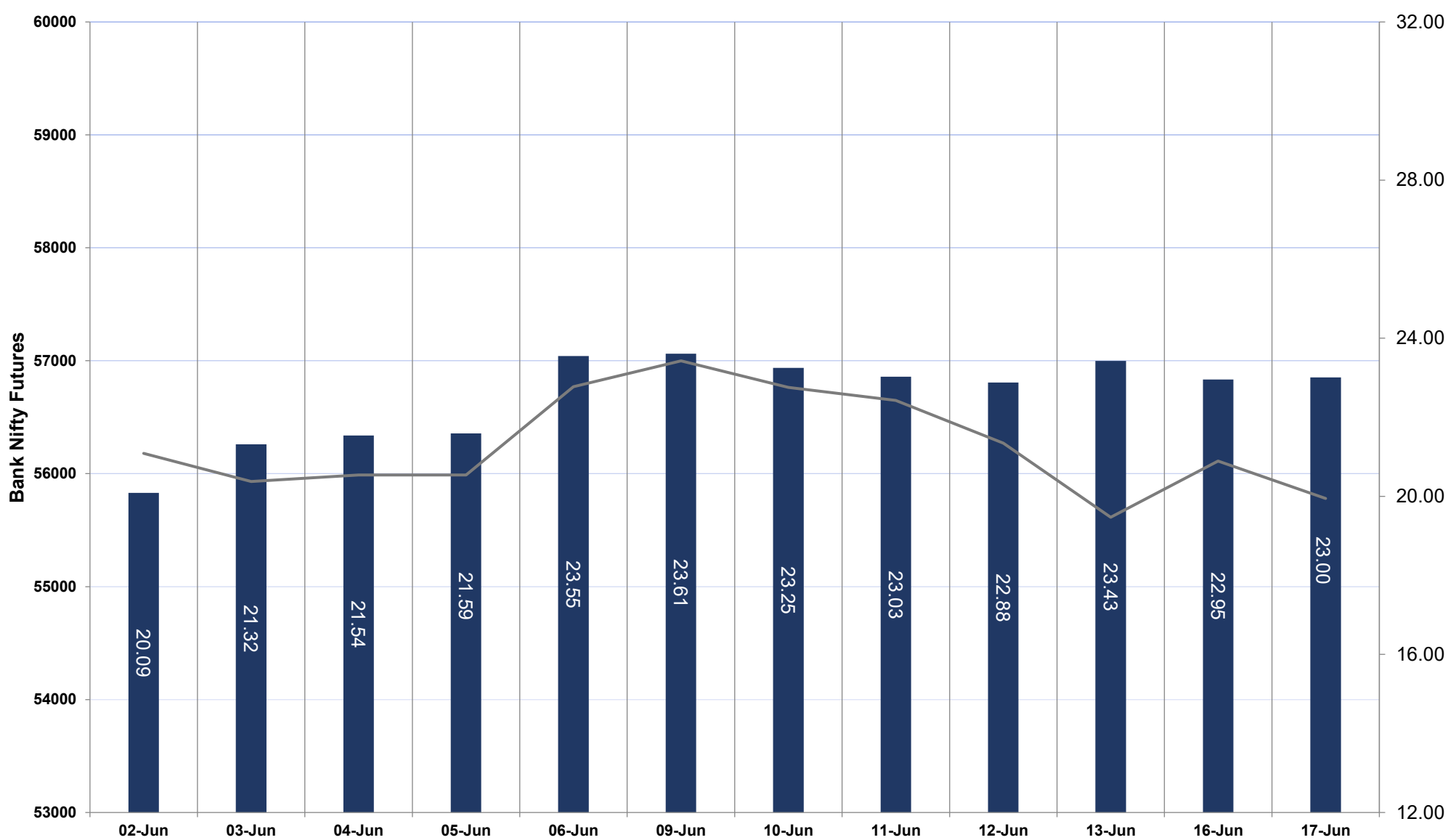
SPREAD: FUTURE & SPOT



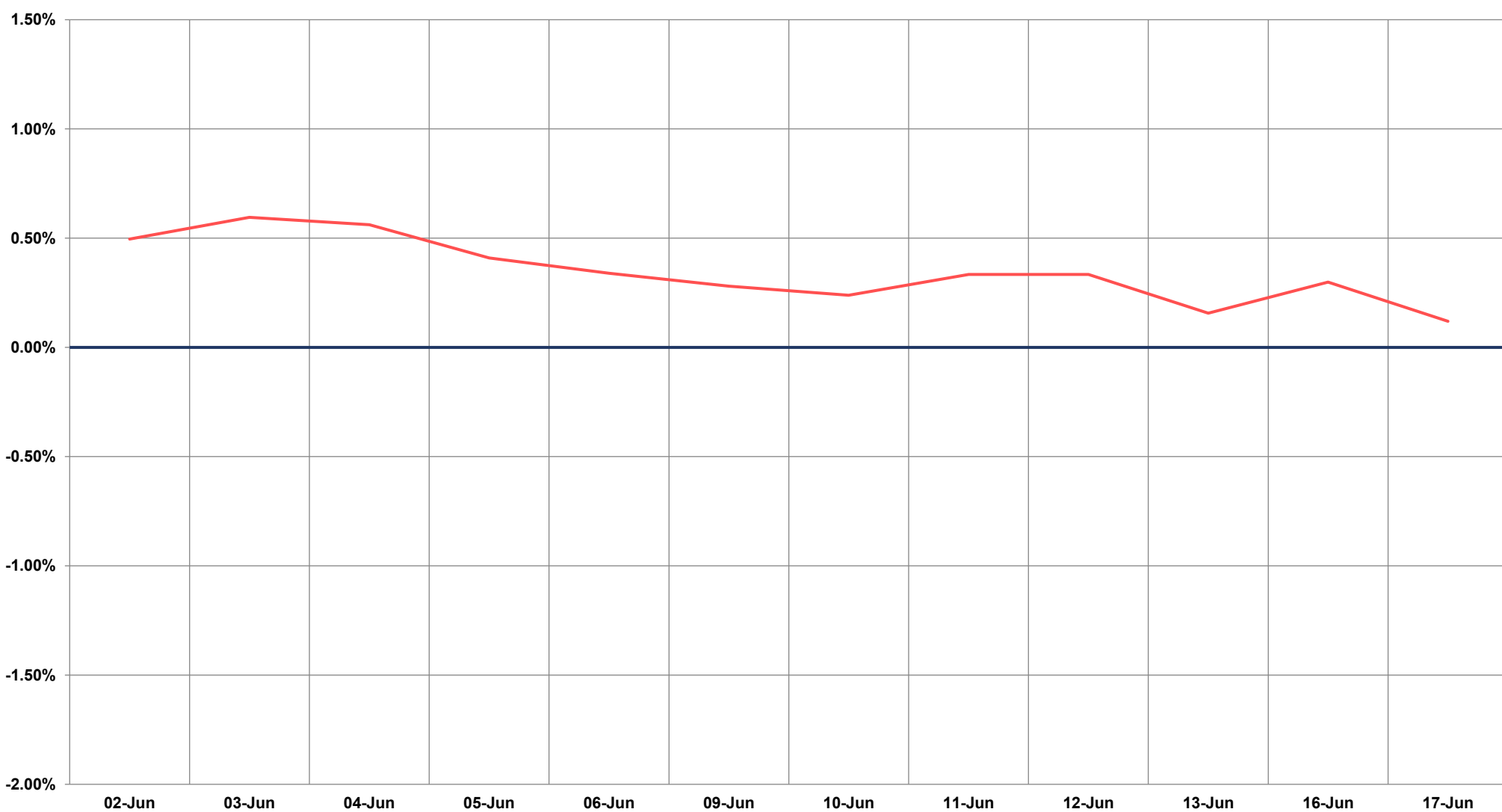
TECHNICAL VIEWS



BANK NIFTY FUTURES



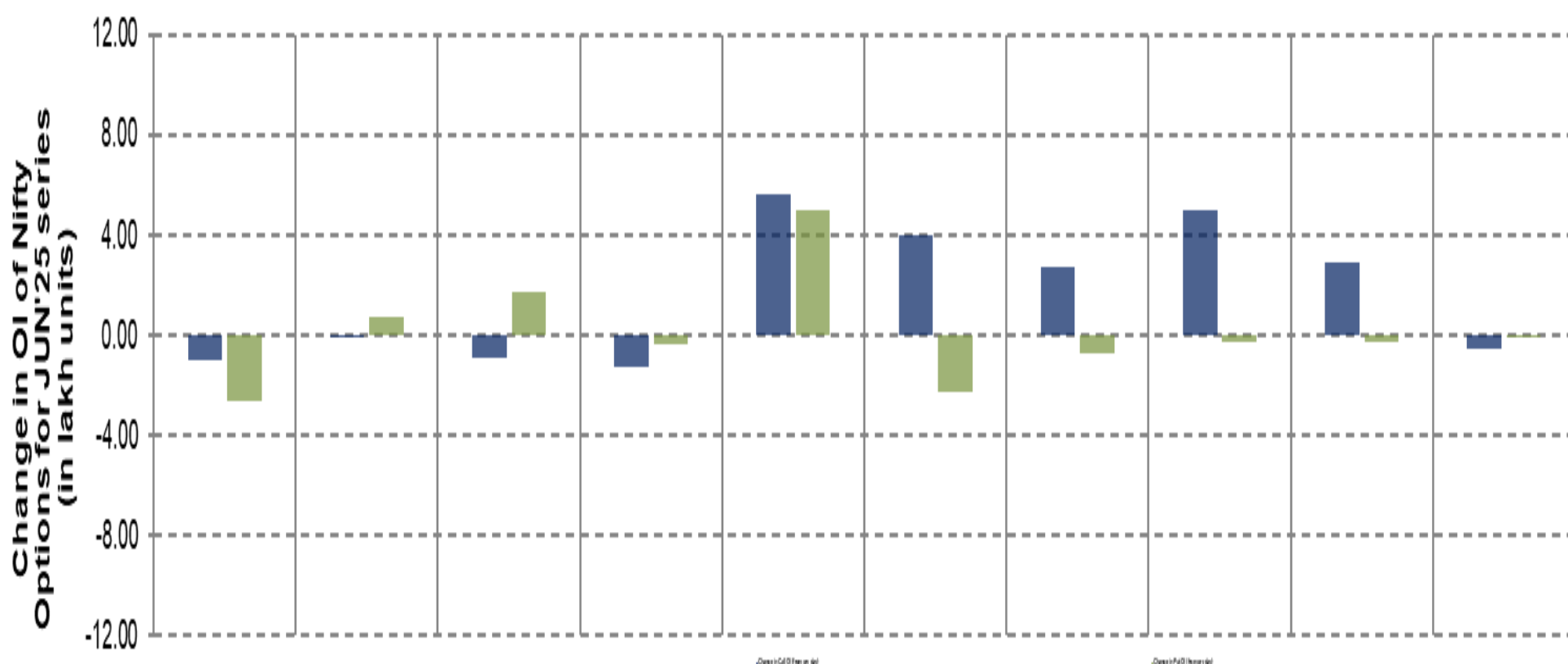
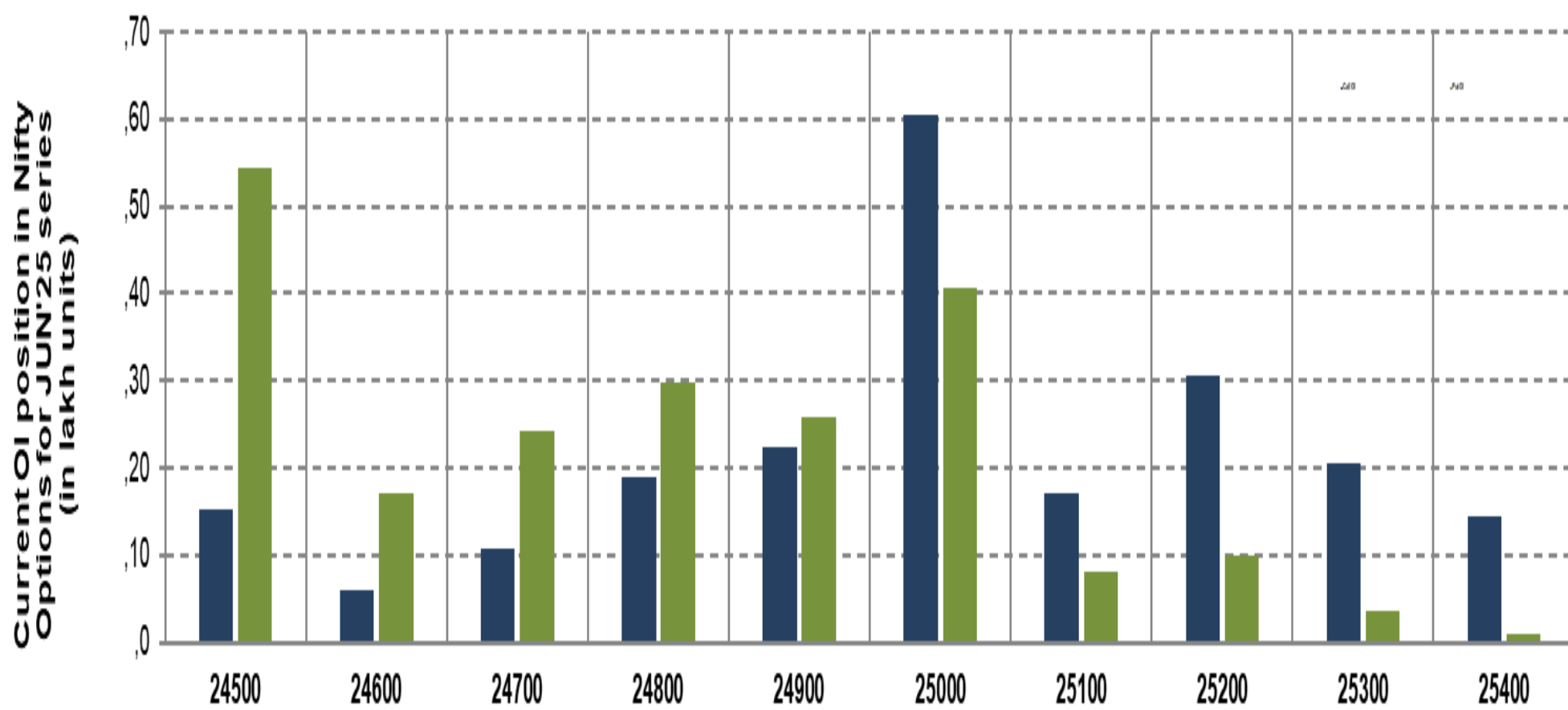
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.56 million in Open Interests is **Strike Price of 24900**
- **Most Active Nifty Put** with a addition of 0.49 millions in Open Interests is **Strike Price of 24900**
- **Maximum Open Interest an outstanding** was 6.05 millions for Calls at **Strike Price of 25000**
- **Maximum Open Interest an outstanding** was 5.43 millions for puts at **Strike Price of 24500**

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