



# MORNING MANTRA



Daily Derivatives & Market Report

June 26, 2025



Indian equity benchmarks remained cheerful for third straight session on Wednesday, with both the Nifty and Sensex closing over 1 percent gains following a strong rally in Banking stocks amid the monthly F&O expiry. Markets made a positive start and maintained upward momentum throughout the day, amid easing geopolitical tensions. Besides, traders shift their focus toward the upcoming U.S. trade tariff deadline on July 9.

Some of the important factors in today's trade:

Icra retains India's GDP growth forecast for FY26 at 6.2%: Sentiments remained upbeat as rating agency Icra retained India's Gross Domestic Product (GDP) growth forecast for fiscal 2025-26 (FY2026) at 6.2 per cent, assuming well-distributed monsoons and crude oil prices averaging around \$70/barrel.

Govt disburses Rs 21,534 crore under PLI schemes for 12 sectors: Some support came as the commerce and industry ministry said the government has disbursed Rs 21,534 crore under its Production-Linked Incentive (PLI) scheme for 12 sectors.

India's economic activities resilient amidst global uncertainties: Traders took note of an article in the Reserve Bank of Indian (RBI) June Bulletin stating that amid global uncertainties, various high-frequency indicators for May 2025 point towards resilient economic activity in India across the industrial and services sectors.

Global front: European markets were trading in green, despite worries over Fed independence and anxiety ahead of the impending deadline for U.S. President Trump's tariff deferrals. Asian markets ended mixed after reports that U.S. President Donald Trump was considering replacing Federal Reserve Chair Jerome Powell as early as September or October.

# MARKET SELFIE



## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	83755.87	1000.36	1.21
NIFTY	25549.00	304.25	1.21
MIDCAP	46362.77	256.32	0.56
SMLCAP	53960.57	63.32	0.12
BSEFMC	20263.90	123.49	0.61
HEALTHCARE	43714.35	122.95	0.28
AUTO	53596.70	273.01	0.51
POWER	6851.29	76.84	1.13
REALTY	7832.38	-82.19	-1.04
BSE IT	38152.71	-51.64	-0.14
BANKEX	64305.68	606.88	0.95
OIL GAS	27585.87	508.28	1.88
METAL	31732.29	708.63	2.28
INDIA VIX	12.59	-0.37	-2.85

## ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1471	1396	108
BSE	2043	1961	149

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	6822	6401	7
NSE CASH	118579	101658	17
NSE F&O	413675	383798	8

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	22.96	3.72	1.10
SENSEX	23.98	4.46	0.95

# KEY NUMBERS TRACKER



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

FII-DII*	Buy	Sell	Net
DII	13647	14068	(421)
FII	31561	18868	12693

Note: FPI & DII Figures are provisional

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

FII	Buy	Sell	Net
Ind. Futures	13044.43	8237.76	4807
Ind. Options	5922656.53	5890383.02	32274
Stk. Futures	55010.40	51843.49	3167
Stk. Options	60062.21	55570.61	4492

## PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.30	1.11
BANK NIFTY	1.05	0.99

## DOLLAR INDEX

Dollar Index	Current	Previous	% Change
DXY	97.11	97.68	-0.58

## 10-YEARS G-SEC YIELD

Country	Current	Previous	% Change
INDIA	6.274	6.288	-0.14
USA	4.263	4.310	-0.63

## KEY COMMODITIES TRACKER (in \$)

Commodity	Current	Change Points	% Change
Gold	3331.90	-6.80	-0.20
Silver	36.67	0.35	0.95
Crude-Oil	65.80	0.90	1.35
Brent-Crude	68.42	0.82	1.21

# CURRENCY FUTURES & INDEX TRENDS TRACKER



## CURRENCY FUTURES

Expiry	Close	Change Points	% Change
26 JUNE-25 USD-INR	85.86	-0.36	-0.41
26 JUNE-25 EUR-INR	100.68	0.42	0.41
26 JUNE-25 GBP-INR	117.80	0.43	0.36
26 JUNE-25 JPY- INR	59.90	1.63	2.81

## INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS

Index	Close	S2	S1	Pivot	R1	R2
NIFTY	25549	25153	25351	25458	25656	25763
SENSEX	83756	82466	83111	83461	84107	84457
NIFTY FUTURES	25551	25171	25361	25462	25653	25754
BANK NIFTY	57207	56304	56756	57010	57461	57715
CNX IT	38996	38610	38803	38953	39146	39296
CNX MIDCAP	59227	58553	58890	59073	59410	59592
CNX SMALLCAP	18806	18626	18716	18770	18860	18913
INDIA VIX	12.59	12.00	12.30	12.81	13.11	13.62

## INDEX TREND ANALYSIS

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

## SECURITIES BAN IN F&O TRADES FOR 27-06-2025

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# TECHNICAL VIEWS



## NIFTY

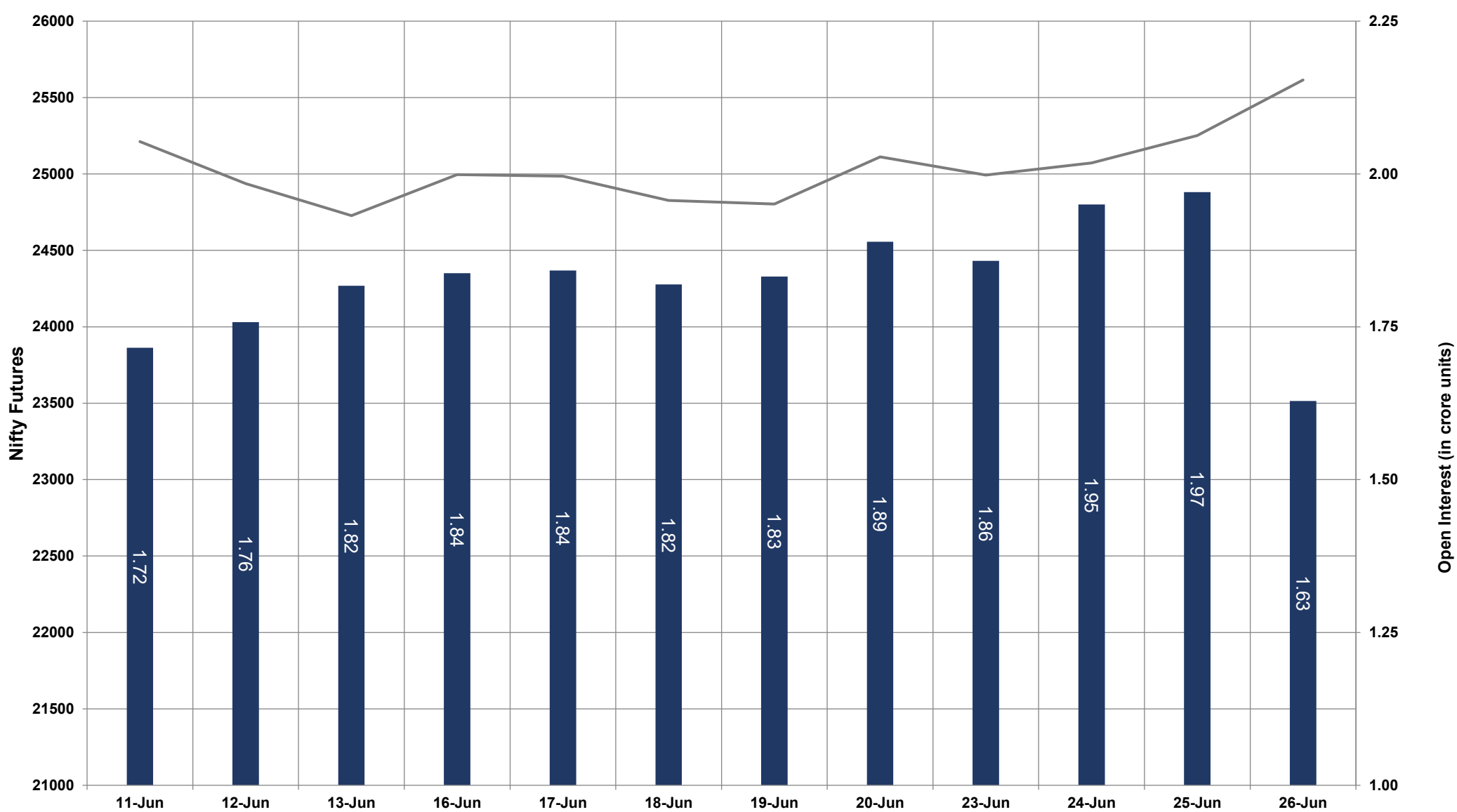


- Nifty Cash = **25549.00 (1.21%)**
- Resistance levels = **25620** and **25800**
- Support levels = **25200** and **25080**

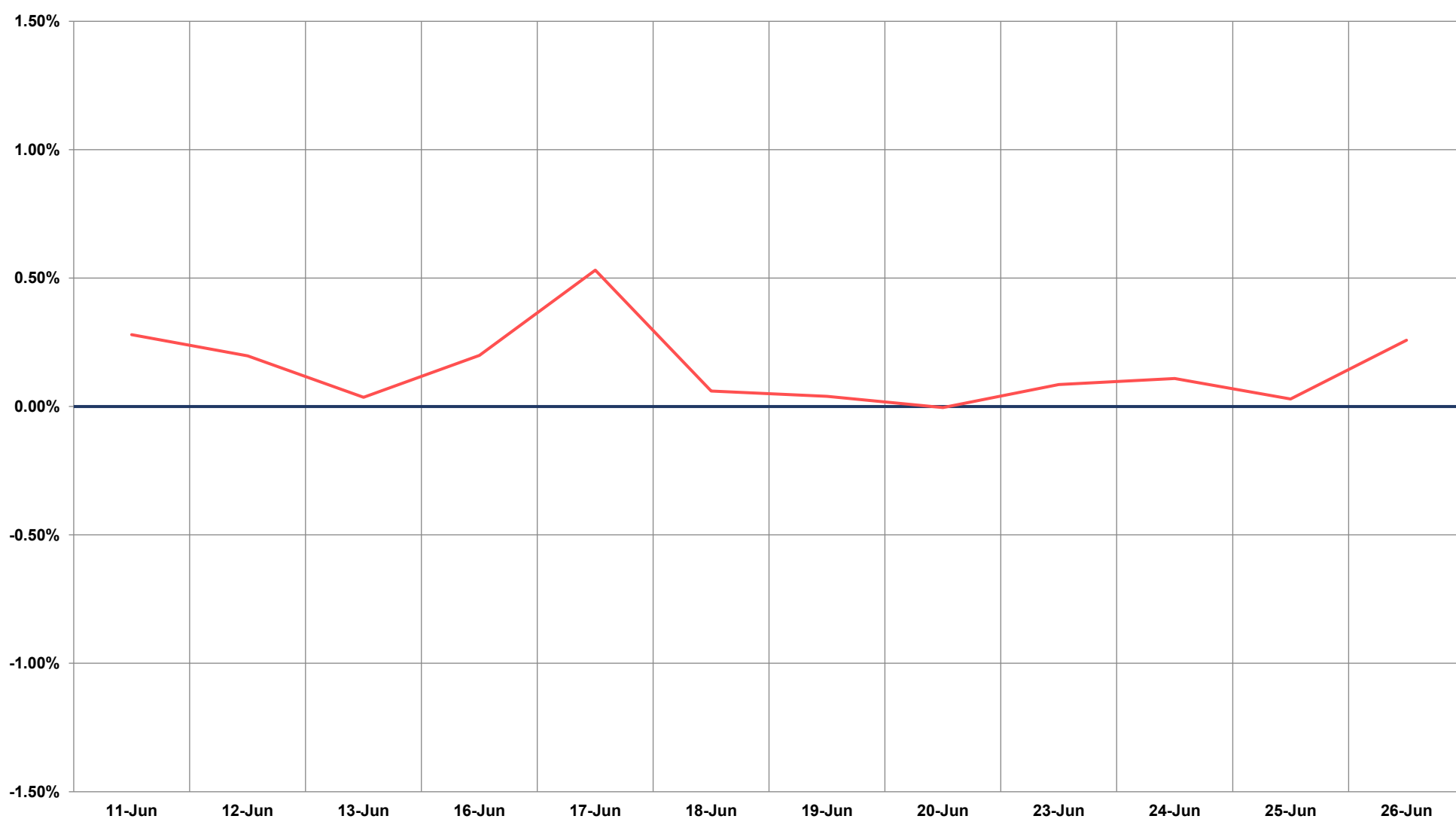
# TECHNICAL VIEWS



## NIFTY FUTURES



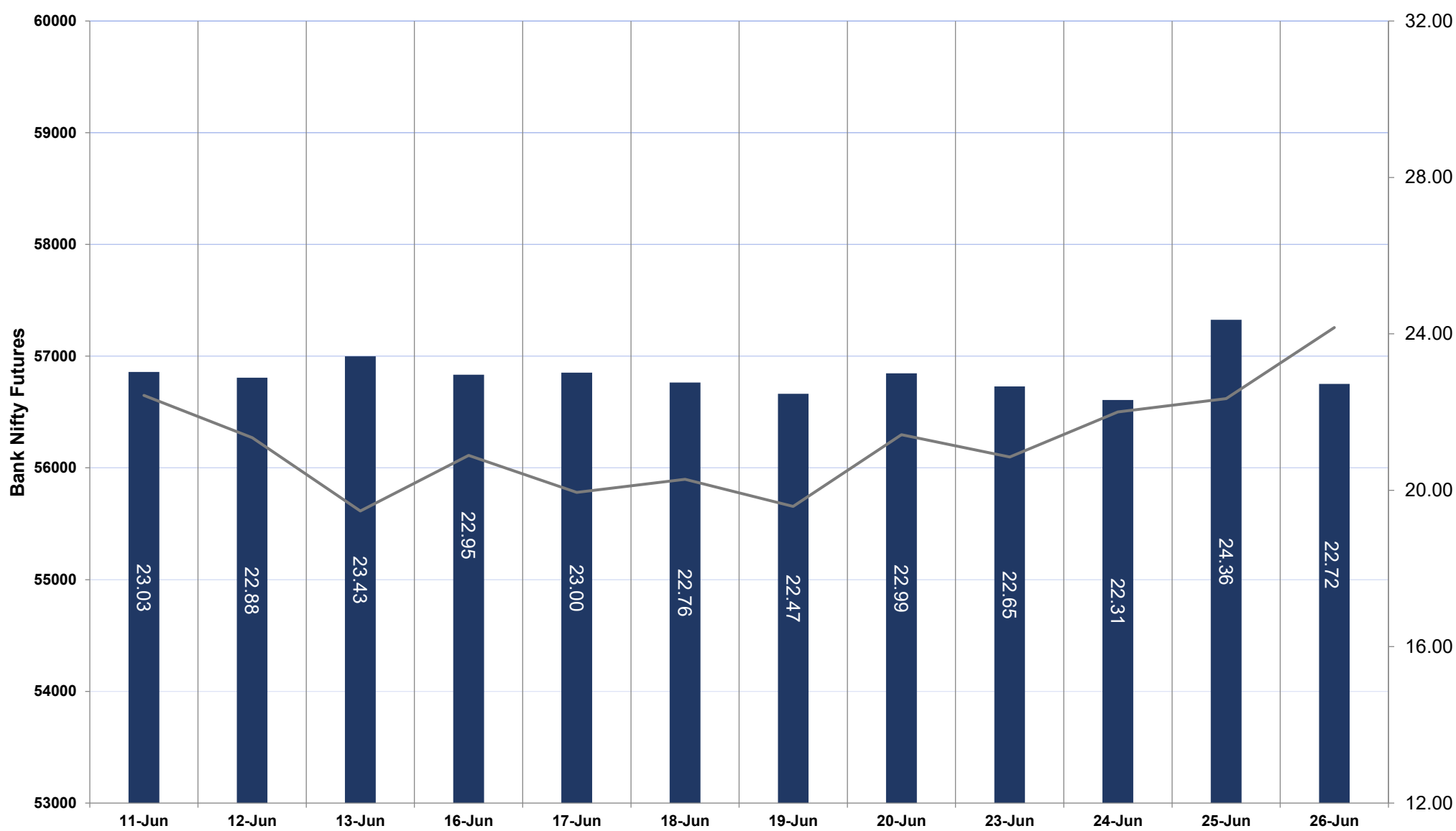
## SPREAD: FUTURE & SPOT



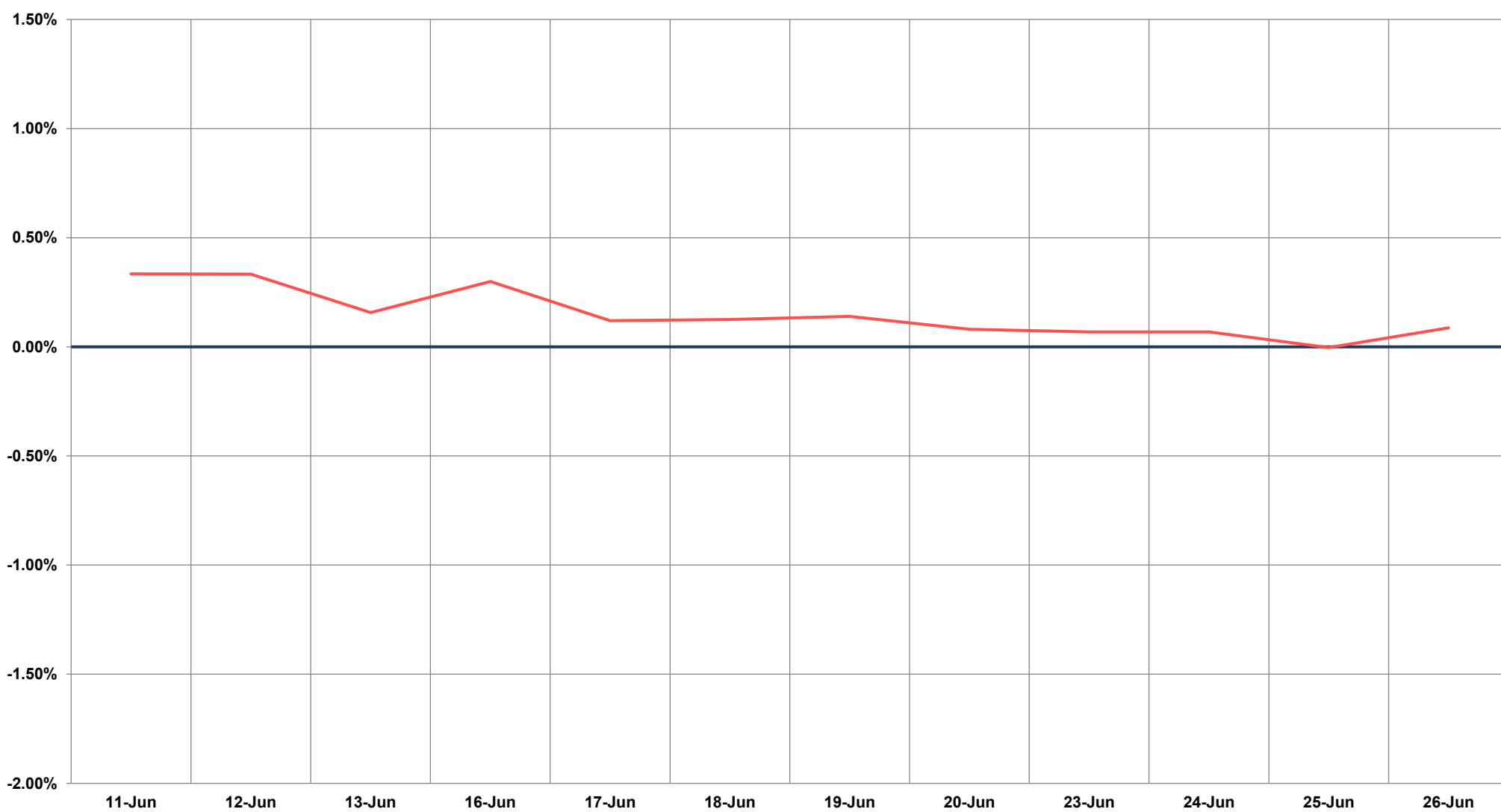
# TECHNICAL VIEWS



## BANK NIFTY FUTURES



## SPREAD: FUTURE & SPOT

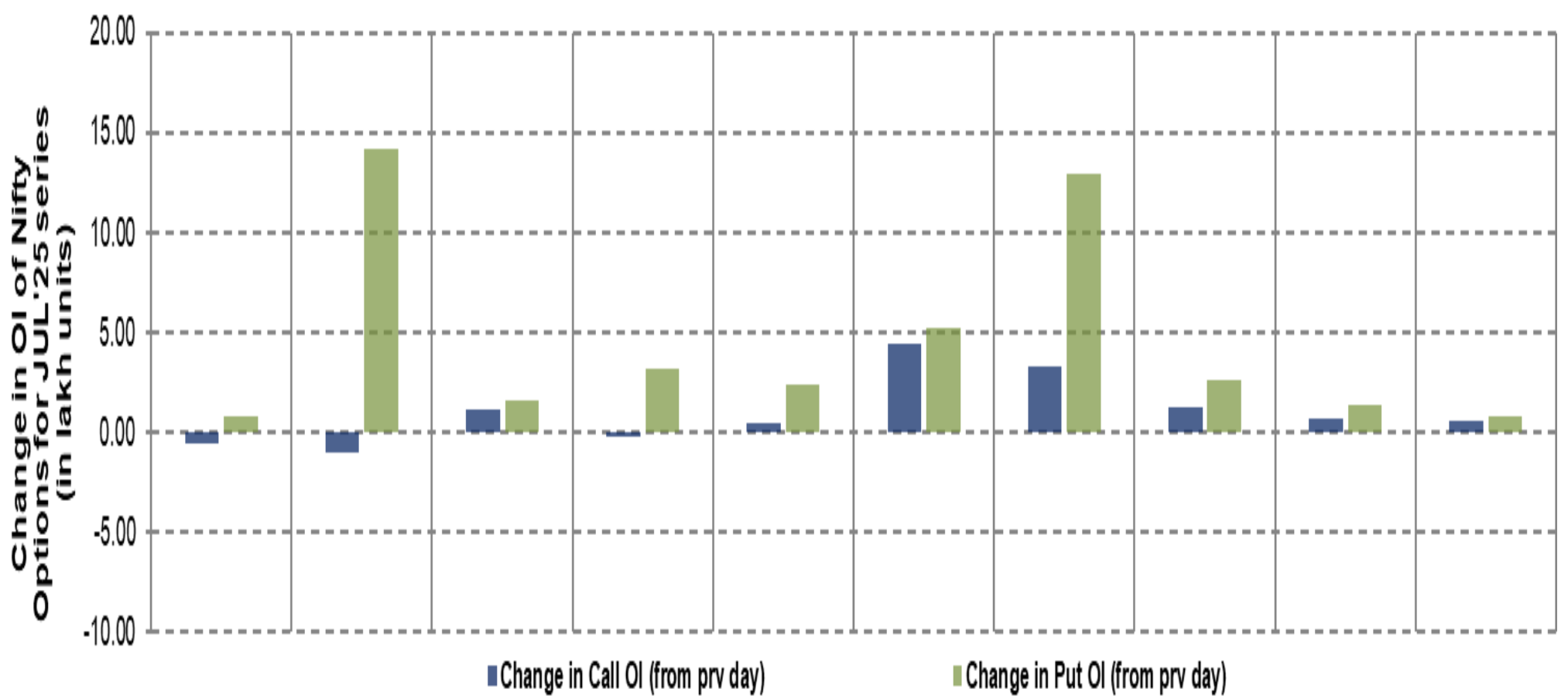
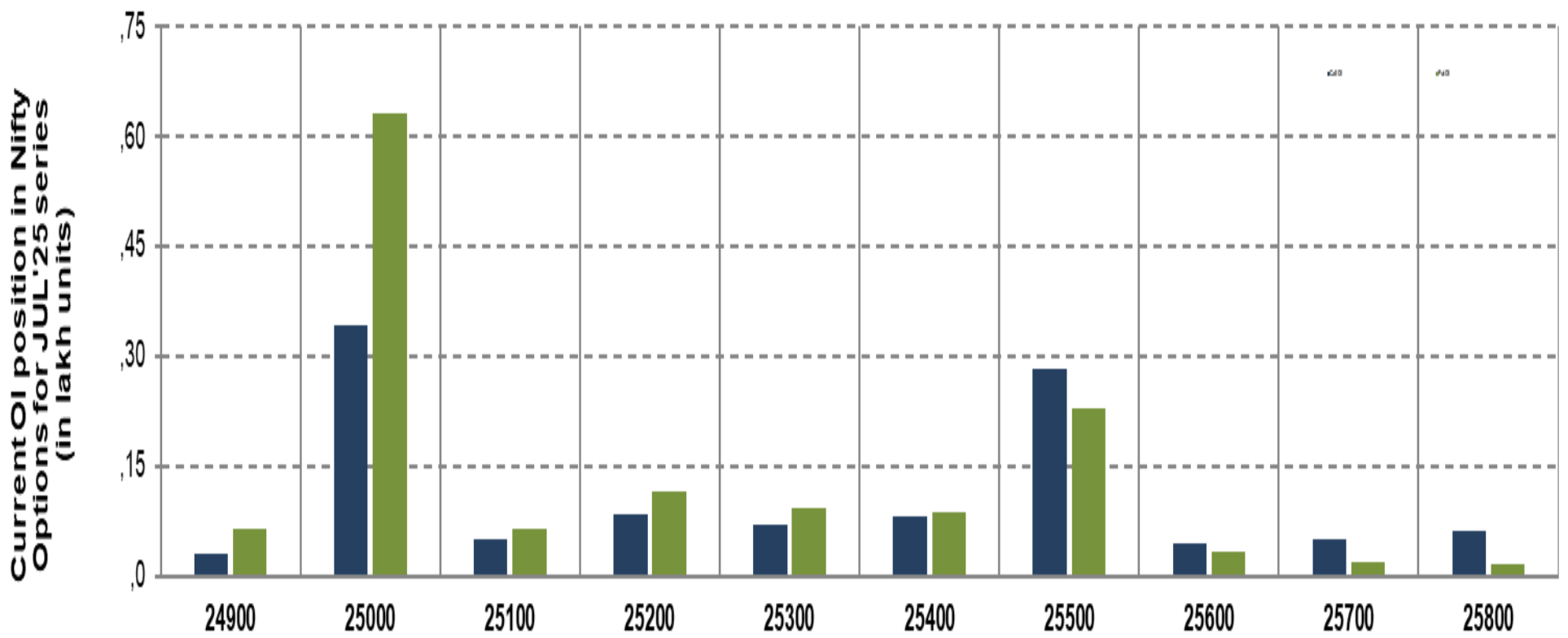




# TECHNICAL VIEWS



## NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.44 million in Open Interests is **Strike Price of 25400**
- **Most Active Nifty Put** with a addition of 1.41 millions in Open Interests is **Strike Price of 25000**
- **Maximum Open Interest an outstanding** was 3.4 millions for Calls at **Strike Price of 25000**
- **Maximum Open Interest an outstanding** was 6.31 millions for puts at **Strike Price of 25000**

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