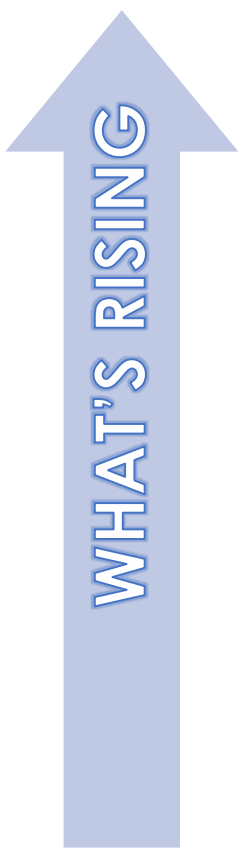


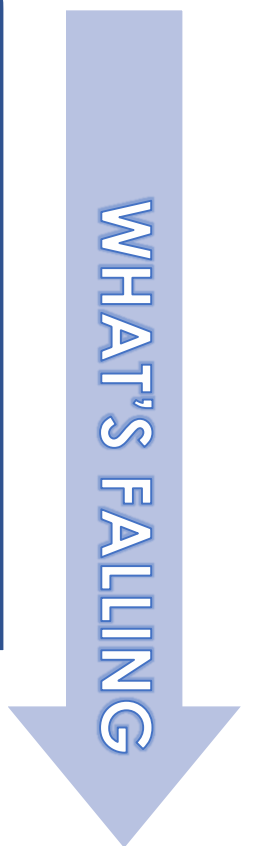


MORNING MANTRA



BULLS

BEARS



Daily Derivatives & Market Report

July 30, 2025



Indian equity benchmarks ended marginally higher on Wednesday, ahead of the US Federal Reserve's monetary policy decision. After making slightly positive start, soon markets turned volatile as traders were cautious after US President Donald Trump said India may be hit with a tariff rate of 20% to 25%. However, indices added some gains and remained in positive territory throughout the session, supported by robust corporate earnings, particularly from Larsen & Toubro.

Some of the important factors in today's trade:

IMF revises slightly upward India's economic growth forecast to 6.4% for 2025: Traders took encouragement with International Monetary Fund's statement that India is projected to grow at 6.4 per cent in fiscal year 2025 and 2026, and the country's stable growth is driven by a reform momentum supporting robust consumption growth and a push for public investment.

US team to visit India on August 25 for next round of talks for trade pact: Traders took note of report that the US team will visit India on August 25 for the next round of negotiations for the proposed bilateral trade agreement between the two countries.

EFTA commits to invest \$100 billion under trade pact with India: Traders took note of Commerce and Industry Minister Piyush Goyal's statement that the four European nations group EFTA has committed to invest \$100 billion under a trade pact with India and these investments are expected to flow into sectors such as infrastructure, manufacturing, and pharma.

Global front: European markets were trading mostly in green ahead of earnings release of big U.S. tech companies and Federal Reserve's rate decision. Asian markets ended mixed as Singapore central bank maintained its monetary policy after easing twice this year, as there are risks to growth from renewed trade conflicts and geopolitical shocks.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	81481.86	143.91	0.18
NIFTY	24855.05	33.95	0.14
MIDCAP	46102.35	76.62	0.17
SMLCAP	53881.48	91.36	0.17
BSEFMC	20332.98	57.01	0.28
HEALTHCARE	45861.72	25.39	0.06
AUTO	53089.07	-339.62	-0.64
POWER	6739.59	1.20	0.02
REALTY	7116.45	-71.02	-0.99
BSE IT	35030.92	106.21	0.30
BANKEX	62230.47	-40.43	-0.06
OIL GAS	27196.68	-16.88	-0.06
METAL	31255.89	-48.94	-0.16
INDIA VIX	11.21	-0.32	-2.78

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1506	1462	87
BSE	1992	2023	143

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	6133	7016	(13)
NSE CASH	89523	94795	(6)
NSE F&O	350278	385128	(9)

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	22.05	3.41	1.37
SENSEX	23.32	4.33	1.21

KEY NUMBERS TRACKER



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

FII-DII*	Buy	Sell	Net
DII	12608	10803	1805
FII	11666	12608	(942)

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)

FII	Buy	Sell	Net
Ind. Futures	8372.18	8817.58	(445)
Ind. Options	1192162.12	1206939.32	(14777)
Stk. Futures	94052.50	94249.76	(197)
Stk. Options	20174.11	21122.69	(949)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	0.87	0.80
BANK NIFTY	0.69	0.70

DOLLAR INDEX

Dollar Index	Current	Previous	% Change
DXY	99.53	98.89	0.65

10-YEARS G-SEC YIELD

Country	Current	Previous	% Change
INDIA	6.365	6.369	-0.06
USA	4.64	4.327	0.67

KEY COMMODITIES TRACKER (in \$)

Commodity	Current	Change Points	% Change
Gold	3292.89	-34.58	-1.04
Silver	37.62	-0.57	-1.48
Crude-Oil	70.14	0.93	1.35
Brent-Crude	73.32	0.70	0.96

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES

Expiry	Close	Change Points	% Change
26 AUG-25 USD-INR	87.55	0.60	0.69
26 AUG-25 EUR-INR	101.16	0.37	0.37
26 AUG-25 GBP-INR	117.11	0.97	0.83
26 AUG-25 JPY- INR	59.40	0.40	0.68

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS

Index	Close	S2	S1	Pivot	R1	R2
NIFTY	24855	24713	24784	24843	24914	24973
SENSEX	81482	80997	81240	81429	81672	81861
NIFTY FUTURES	24869	24731	24800	24855	24925	24980
BANK NIFTY	56151	55922	56036	56179	56293	56435
CNX IT	35482	35150	35316	35424	35590	35697
CNX MIDCAP	57942	57534	57738	57904	58108	58275
CNX SMALLCAP	18157	18004	18080	18214	18291	18425
INDIA VIX	11.20	10.03	10.61	11.20	11.78	12.37

INDEX TREND ANALYSIS

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

SECURITIES BAN IN F&O TRADES FOR 31-07-2025

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TECHNICAL VIEWS



NIFTY

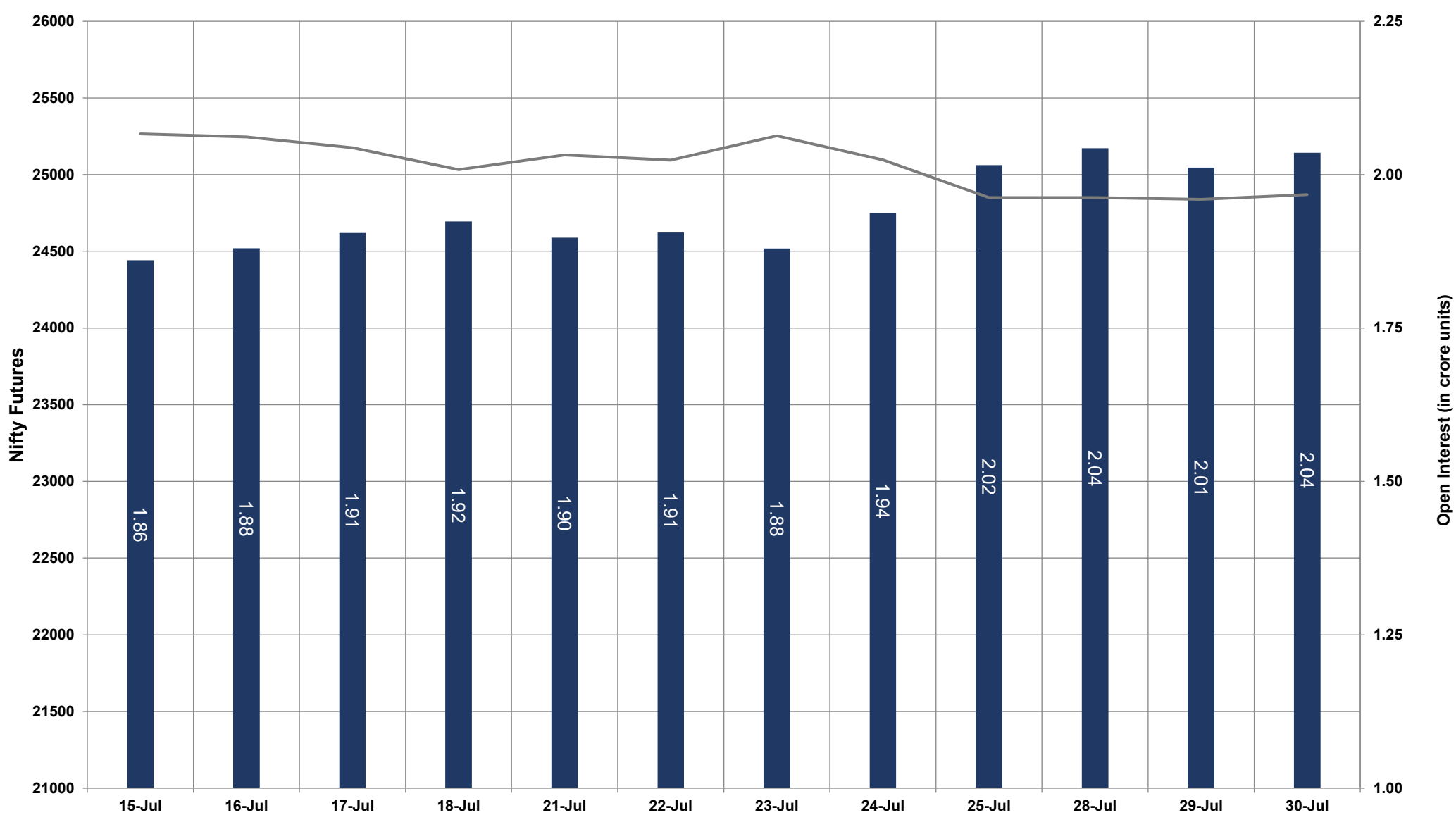


- Nifty Cash = **24855.05 (0.14%)**
- Resistance levels = **24930** and **25080**
- Support levels = **24775** and **24610**

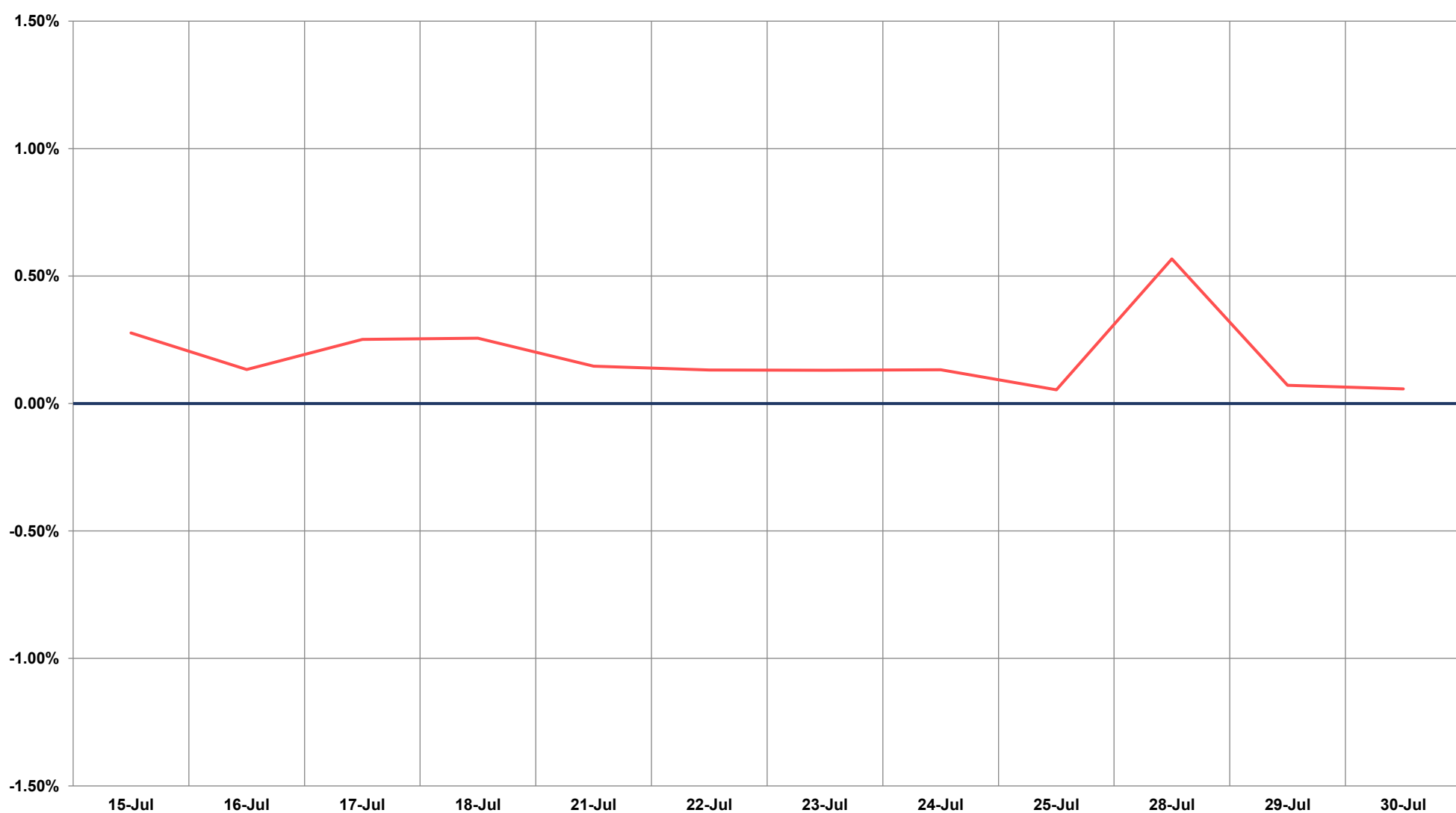
TECHNICAL VIEWS



NIFTY FUTURES



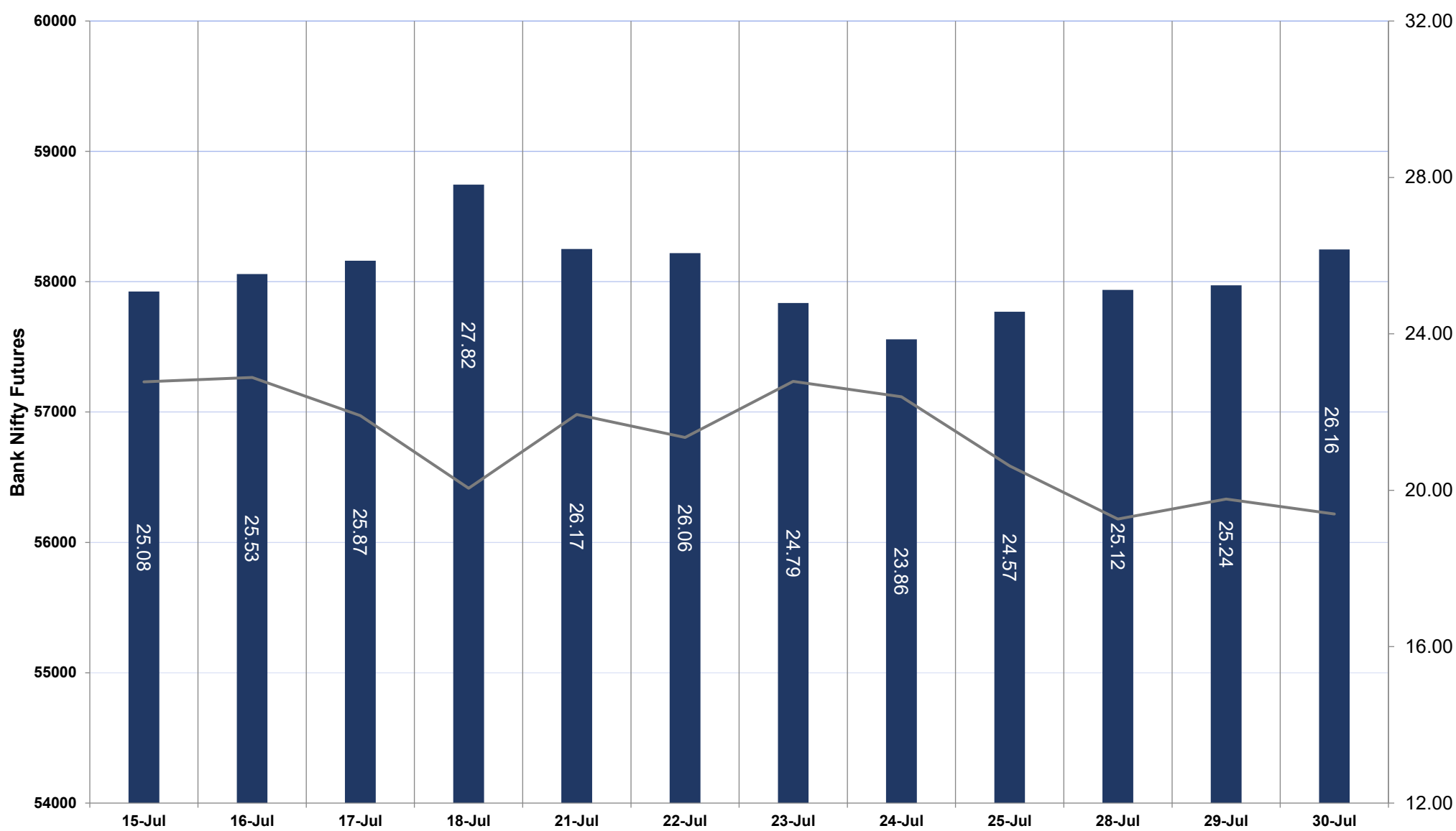
SPREAD: FUTURE & SPOT



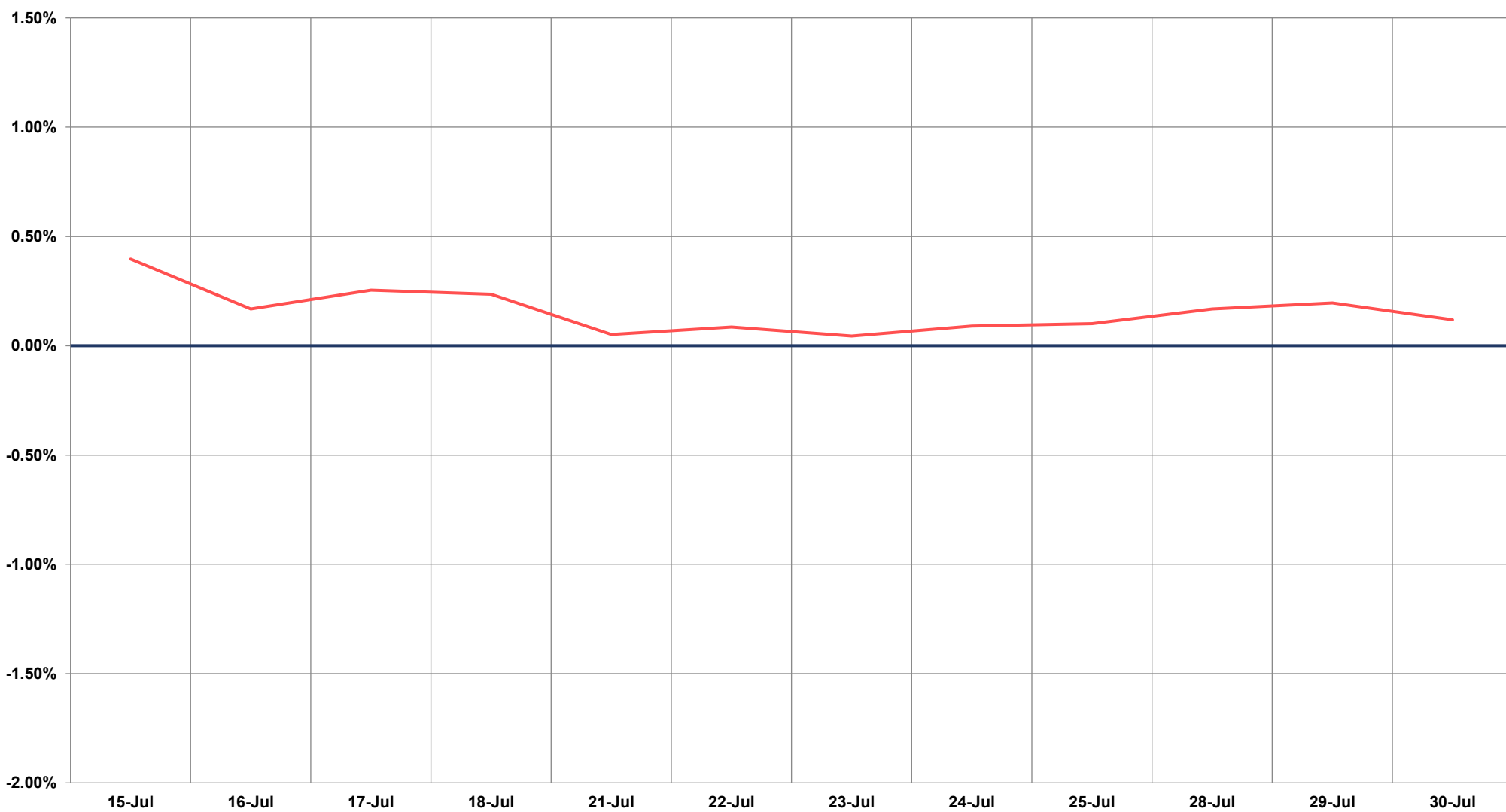
TECHNICAL VIEWS



BANK NIFTY FUTURES



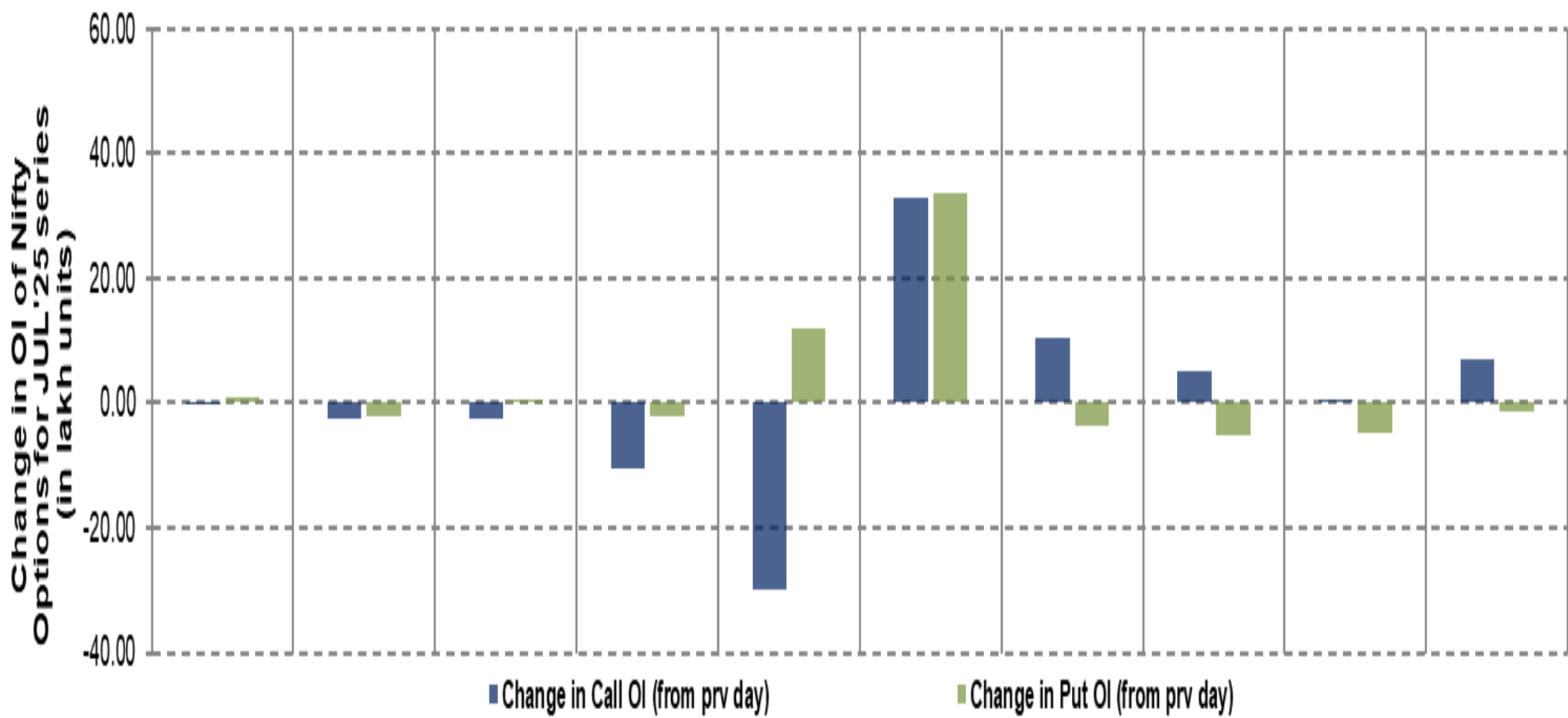
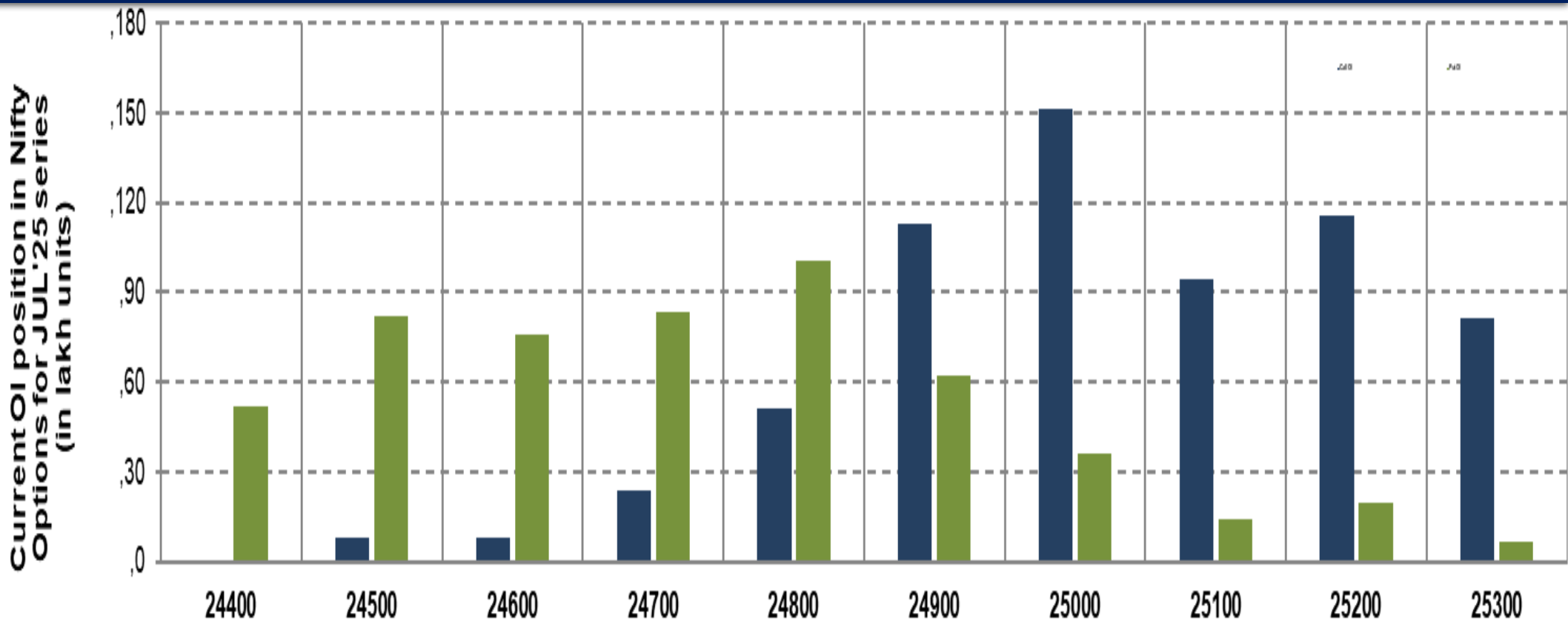
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 3.28 million in Open Interests is **Strike Price of 24900**
- **Most Active Nifty Put** with a addition of 3.35 millions in Open Interests is **Strike Price of 24900**
- **Maximum Open Interest an outstanding** was 15.12 millions for Calls at **Strike Price of 25000**
- **Maximum Open Interest an outstanding** was 10.04 millions for puts at **Strike Price of 24800**

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