



MORNING MANTRA



Daily Derivatives & Market Report

Aug 13, 2025



Indian equity benchmarks ended in positive terrain, with both Nifty and Sensex closing over one percent gains, tracking positive cues from global markets, and ahead of the key meeting between US President Donald Trump and Russian President Vladimir Putin later this week. Index made positive start and remained higher till end of the day, driven by rise in Healthcare, Metal, and Auto stocks.

Some of the important factors in today's trade:

Retail inflation in July slows to 8-year low of 1.5%: Traders took some support with the Government data showing that retail inflation slowed to an 8-year low of 1.55 percent in July, falling below the Reserve Bank's comfort zone for the first time since January 2019, helped by subdued prices of food items.

Negotiations for India-Oman trade pact concluded: Some support also came as the government said negotiations for India-Oman comprehensive free trade agreement (FTA), which would help boost bilateral trade and investments, have been concluded.

Net direct tax mop-up falls nearly 4% to Rs 6.64 lakh crore this fiscal on higher refunds: Traders overlooked Government data showed that net direct tax collection dipped 3.95 percent to Rs 6.64 lakh crore so far this fiscal, mainly on account of higher refunds.

Global front: European markets were trading in green, as Germany's consumer price inflation remained stable in July. Asian markets ended in green boosted by Hong Kong and Japanese markets amid improved outlook for interest rates after US consumer price inflation for July came in line with expectations.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	80539.91	304.32	0.38
NIFTY	24619.35	131.95	0.54
MIDCAP	45059.67	249.79	0.56
SMLCAP	52095.84	299.10	0.58
BSEFMC	20257.81	-5.71	-0.03
HEALTHCARE	44597.50	772.62	1.76
AUTO	53948.43	627.92	1.18
POWER	6644.83	0.56	0.01
REALTY	6883.33	17.77	0.26
BSE IT	34048.36	12.71	0.04
BANKEX	61484.00	176.10	0.29
OIL GAS	26334.51	-7.93	-0.03
METAL	31121.23	376.52	1.22
INDIA VIX	12.14	-0.09	-0.76

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1685	1287	89
BSE	2150	1946	160

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	8395	8035	4
NSE CASH	87454	79109	11
NSE F&O	146566	130795	12

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	21.68	3.27	1.37
SENSEX	22.59	4.28	1.19

KEY NUMBERS TRACKER



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

FII-DII*	Buy	Sell	Net
DII	13465	7783	5682
FII	10702	14267	(3564)

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)

FII	Buy	Sell	Net
Ind. Futures	2074.76	1613.94	461
Ind. Options	1102473.05	1107717.98	(5245)
Stk. Futures	22714.62	20122.90	2592
Stk. Options	20666.94	19989.35	678

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.08	0.79
BANK NIFTY	0.75	0.76

DOLLAR INDEX

Dollar Index	Current	Previous	% Change
DXY	97.74	98.10	-0.36

10-YEARS G-SEC YIELD

Country	Current	Previous	% Change
INDIA	6.481	6.483	-0.03
USA	4.231	4.293	-1.79

KEY COMMODITIES TRACKER (in \$)

Commodity	Current	Change Points	% Change
Gold	3359.69	9.23	0.28
Silver	38.48	0.58	1.52
Crude-Oil	62.11	-0.97	-1.51
Brent-Crude	65.16	-0.95	-1.42

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES

Expiry	Close	Change Points	% Change
26 AUG-25 USD-INR	87.47	-0.32	-0.36
26 AUG-25 EUR-INR	102.59	0.63	0.61
26 AUG-25 GBP-INR	118.74	0.60	0.50
26 AUG-25 JPY- INR	59.72	0.35	0.59

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS

Index	Close	S2	S1	Pivot	R1	R2
NIFTY	24619	24477	24548	24606	24678	24736
SENSEX	80540	80149	80345	80514	80709	80879
NIFTY FUTURES	24712	24552	24632	24690	24770	24828
BANK NIFTY	55181	54870	55026	55183	55339	55496
CNX IT	34693	34407	34550	34696	34839	34985
CNX MIDCAP	56682	56318	56500	56656	56838	56995
CNX SMALLCAP	17614	17499	17556	17597	17655	17696
INDIA VIX	12.14	10.19	11.16	11.76	12.73	13.33

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	Neutral	Sell	Sell

SECURITIES BAN IN F&O TRADES FOR 14-08-2025

TITAGARH, PGEL, RBLBANK, PNBHOUSING

TECHNICAL VIEWS



NIFTY

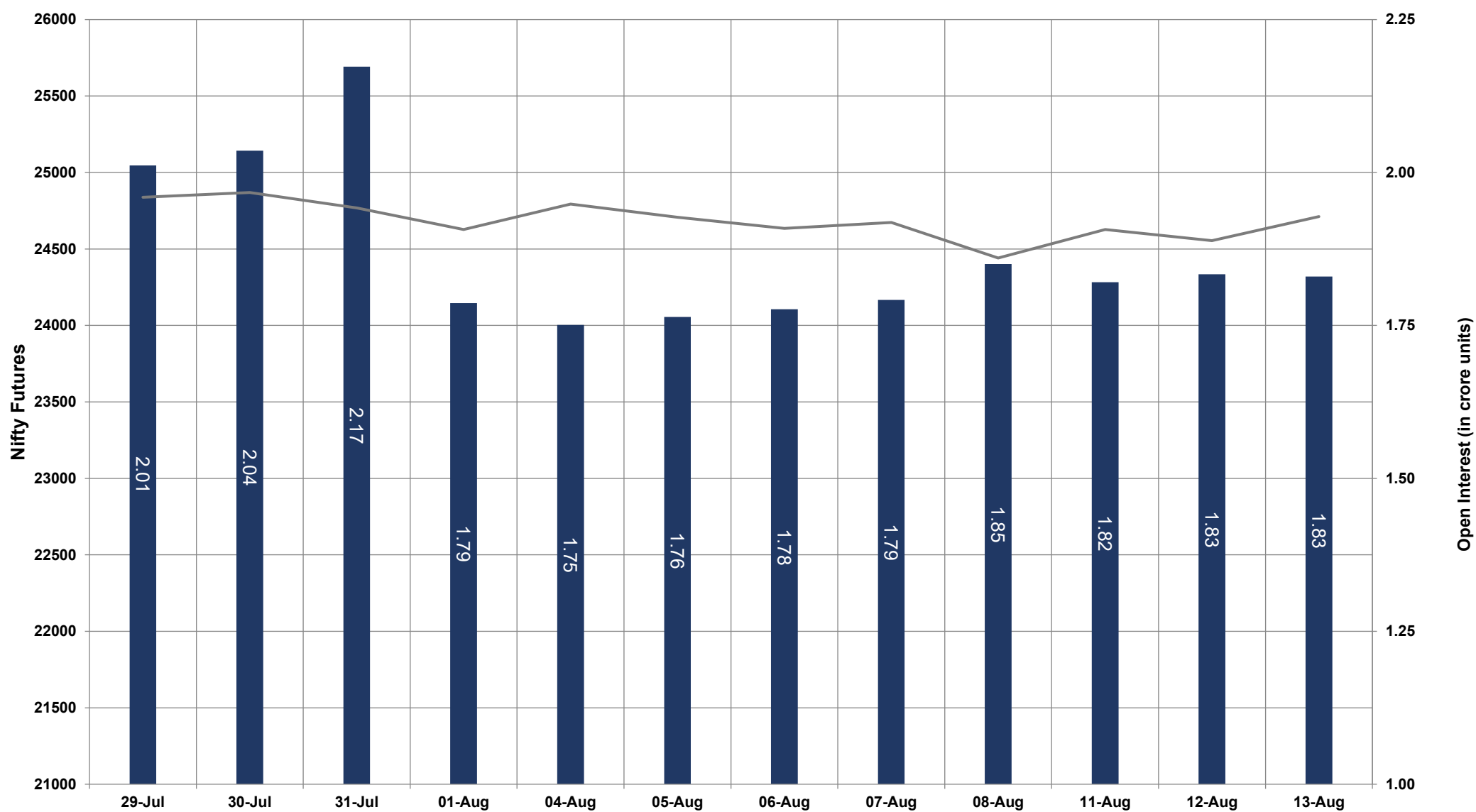


- Nifty Cash = **24619.35 (0.54%)**
- Resistance levels = **24720** and **24830**
- Support levels = **24540** and **24470**

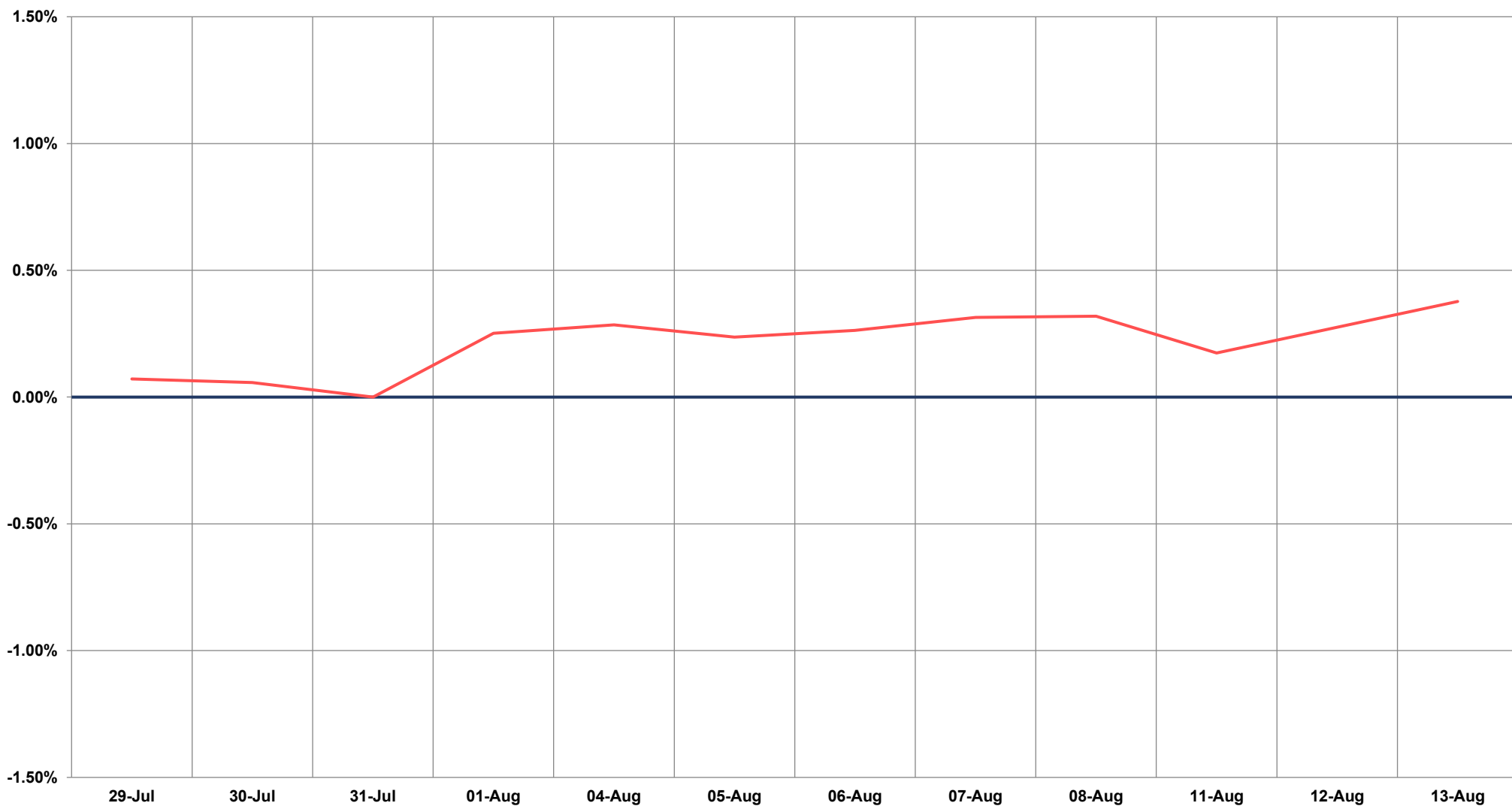
TECHNICAL VIEWS



NIFTY FUTURES



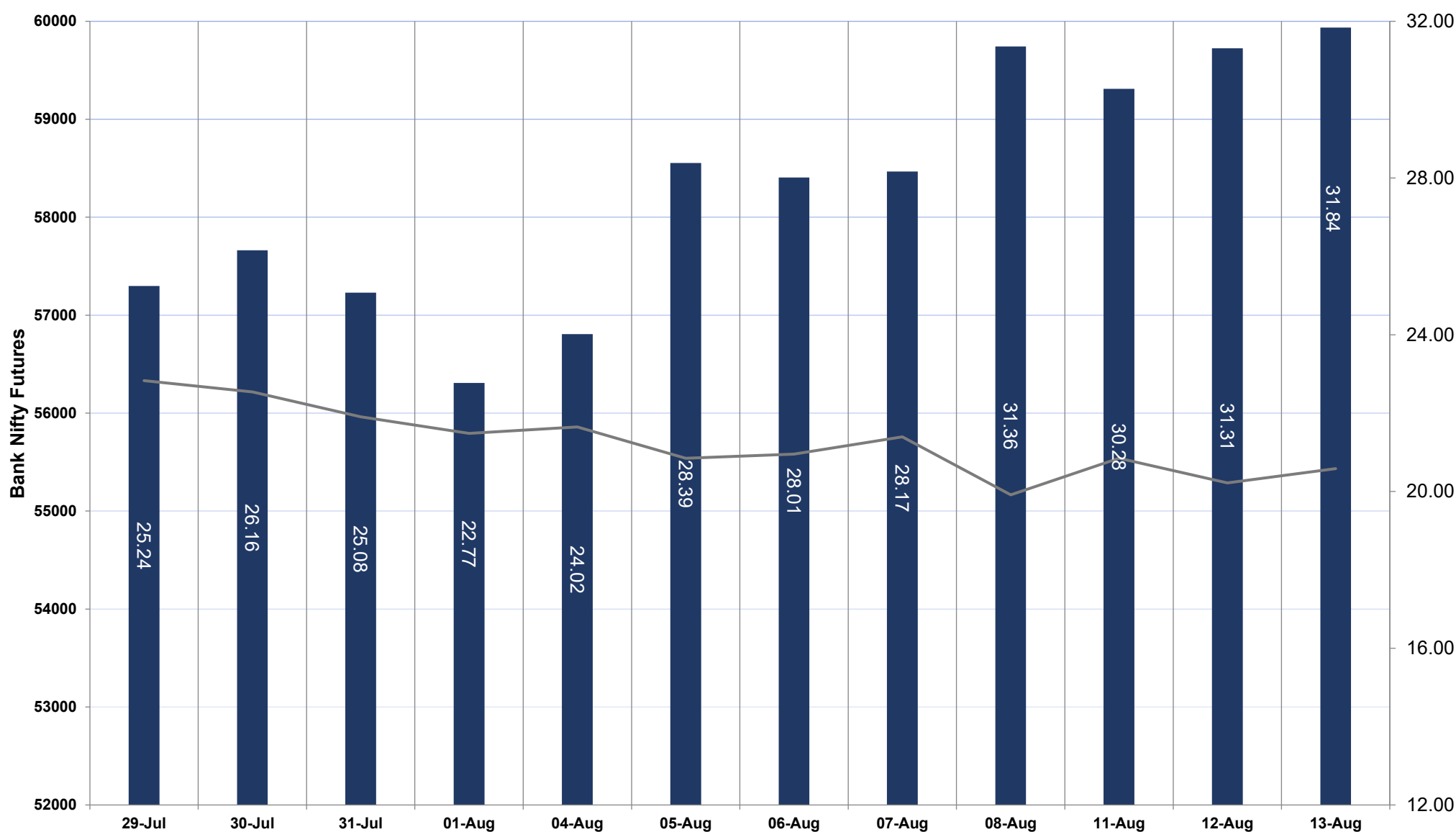
SPREAD: FUTURE & SPOT



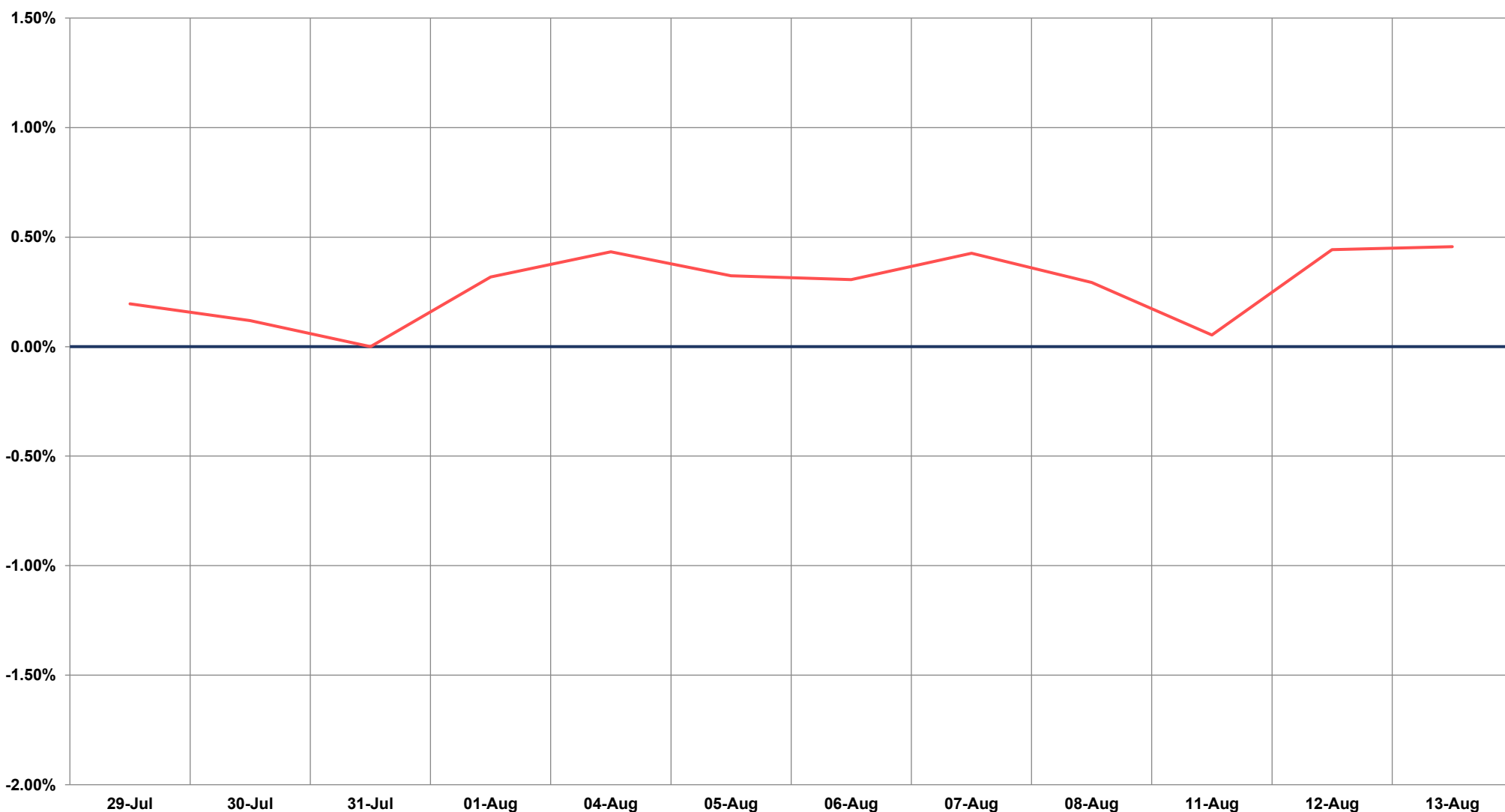
TECHNICAL VIEWS



BANK NIFTY FUTURES



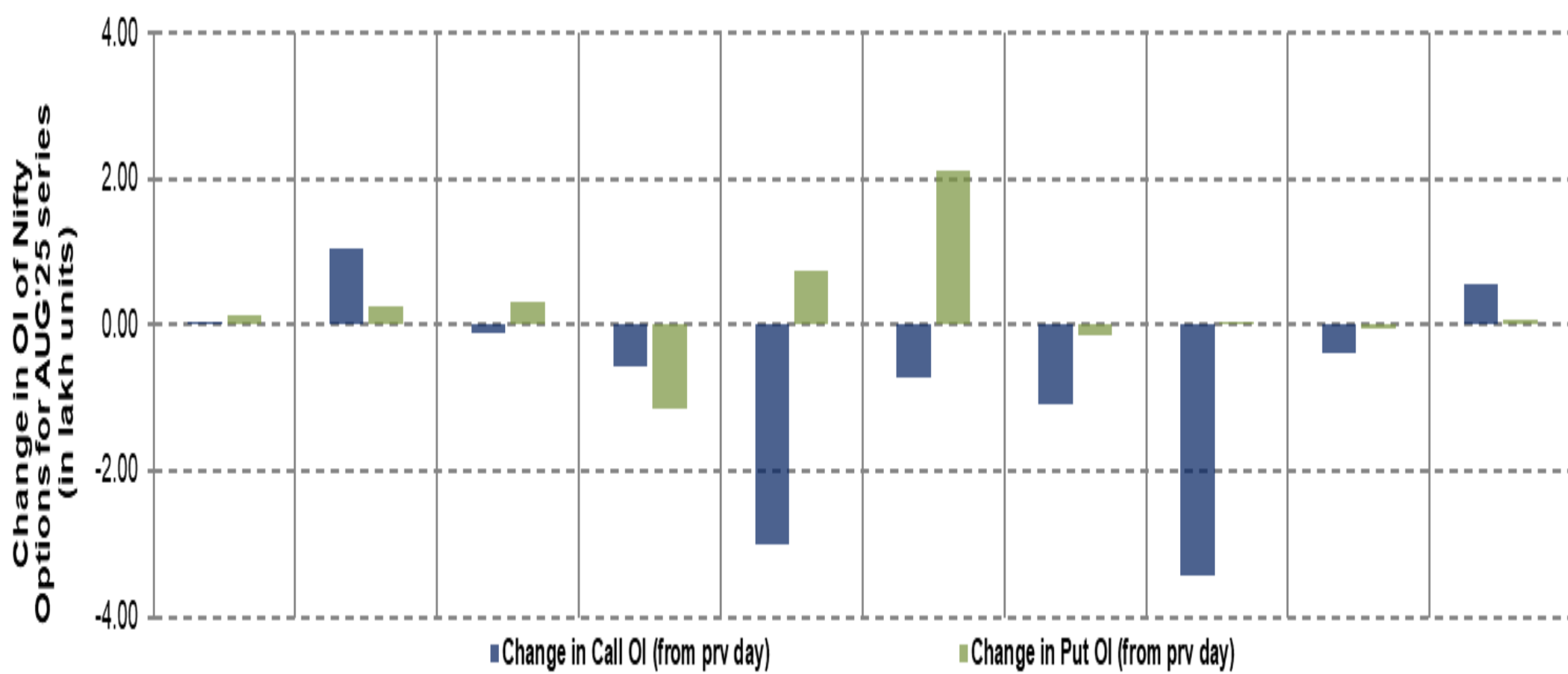
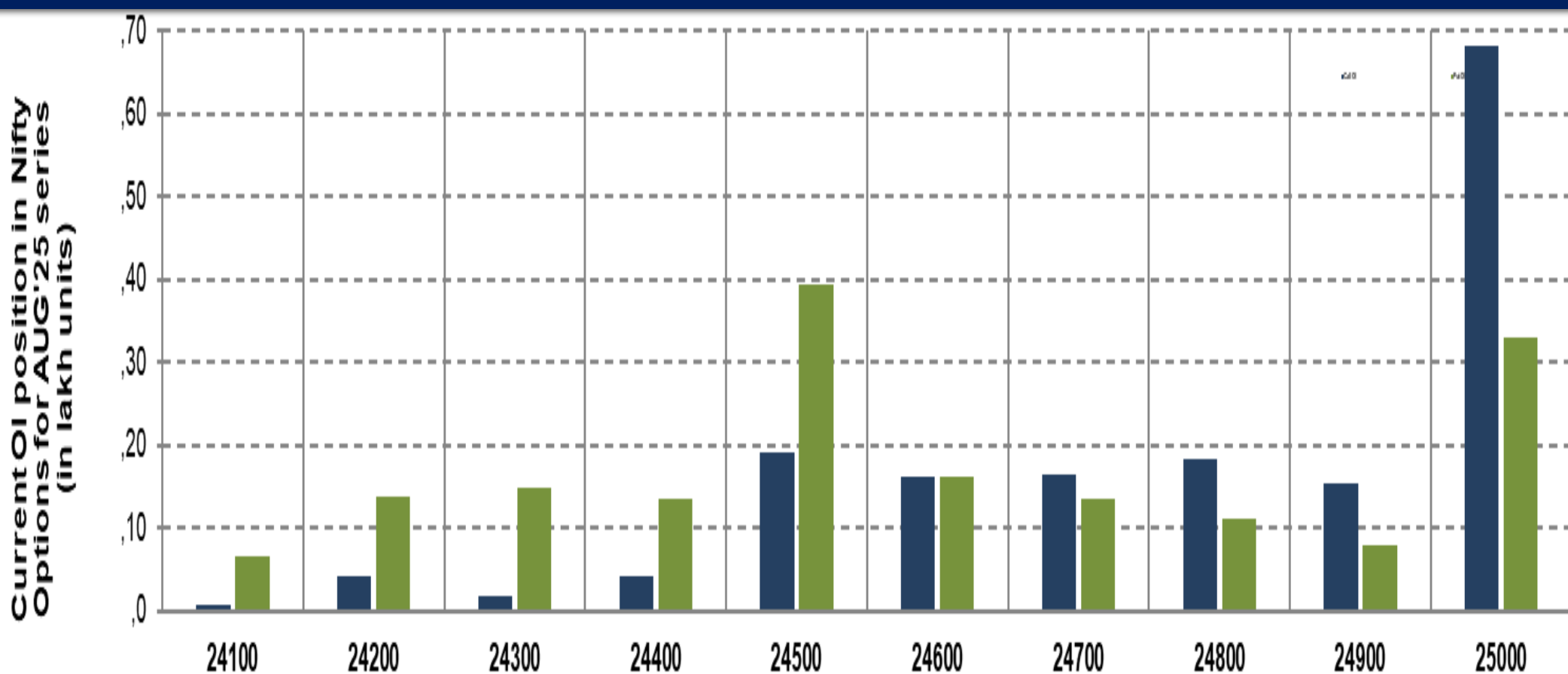
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an subtraction of 0.30 million in Open Interests is **Strike Price of 24500**
- **Most Active Nifty Put** with an addition of 0.21 millions in Open Interests is **Strike Price of 24600**
- **Maximum Open Interest an outstanding** was 6.82 millions for Calls at **Strike Price of 25000**
- **Maximum Open Interest an outstanding** was 3.94 millions for puts at **Strike Price of 24500**

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