



MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

Sep 17, 2025



Indian equity benchmarks witnessed significant gains on Tuesday, with both the Nifty and Sensex closing over half a percent gains, ahead of the outcome of US Federal Reserve's monetary policy meeting. Indices made slightly positive start and extended their gains to end near day's high points, amid hopeful developments in India-US trade discussions. Indian and U.S. officials have reportedly restarted trade talks, aiming to resolve tariff dispute and revive stalled deal.

Some of the important factors in trade:

India's exports rise 6.7% to \$35.1 billion in August: Traders were optimistic as the government data showed that India's exports rose 6.7% to \$35.1 billion in August annually, while imports declined 10.12% to \$61.59 billion.

Unemployment in India declines for second month to 5.1% in August: Some support came as the government data showed that the India's unemployment rate for persons aged 15 years and above declined for the second month in a row in August, to 5.1%. The unemployment rate was 5.2% in July and 5.6% in both May and June.

Banks' credit growth to inch up to 12% in FY26: Traders took a note of Domestic credit rating agency Crisil in its latest report has said that banks' credit growth will accelerate in the second half of the fiscal year (H2FY26) and inch up to 12 per cent in FY26.

Global front: European markets were trading in red ahead of the start of a two-day policy meeting of the Federal Reserve later in the day, with traders eyeing a widely expected 25 bps rate cut. Asian markets ended mostly in green as trader got some support with President Donald Trump's statement that the U.S.-China trade negotiations in Spain were progressing well.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	82693.71	313.02	0.38
NIFTY	25330.25	91.15	0.36
MIDCAP	46742.02	86.43	0.19
SMLCAP	54537.03	276.99	0.51
BSEFMC	20746.39	-33.26	-0.16
HEALTHCARE	44738.73	-37.44	-0.08
AUTO	60948.99	324.62	0.54
POWER	6774.03	-6.7	-0.1
REALTY	7136.05	26.05	0.37
BSE IT	35789.15	255.43	0.72
BANKEX	62427.39	465.51	0.75
OIL GAS	26630.82	181.19	0.69
METAL	32895.77	-161.52	-0.49
INDIA VIX	10.2475	-0.025	-0.24

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1764	1316	98
BSE	2443	1713	179

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	7680	7680	(0)
NSE CASH	101041	91049	11
NSE F&O	131677	134821	(2)

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	22.25	3.38	1.34
SENSEX	22.85	4.40	1.17

KEY NUMBERS TRACKER



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

FII-DII*	Buy	Sell	Net
DII	12838	10633	2205
FII	11156	12146	(990)

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)

FII	Buy	Sell	Net
Ind. Futures	3007.11	1299.02	1708
Ind. Options	696428.08	699961.31	(3533)
Stk. Futures	16580.51	16982.30	(402)
Stk. Options	36515.70	36546.38	(31)

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.15	1.17
BANK NIFTY	1.09	1.08

DOLLAR INDEX

Dollar Index	Current	Previous	% Change
DXY	96.78	96.63	0.14

10-YEARS G-SEC YIELD

Country	Current	Previous	% Change
INDIA	6.468	6.491	-0.34
USA	4.015	4.035	-0.22

KEY COMMODITIES TRACKER (in \$)

Commodity	Current	Change Points	% Change
Gold	3661.05	-32.13	-0.87
Silver	41.42	-1.20	-2.80
Crude-Oil	63.91	-0.61	-0.96
Brent-Crude	67.84	-0.64	-0.94

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES

Expiry	Close	Change Points	% Change
26 AUG-25 USD-INR	87.88	-0.25	-0.28
26 AUG-25 EUR-INR	104.12	-0.01	-0.01
26 AUG-25 GBP-INR	119.94	-0.28	-0.23
26 AUG-25 JPY- INR	60.15	0.10	0.16

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS

Index	Close	S2	S1	Pivot	R1	R2
NIFTY	25330	25246	25288	25317	25359	25389
SENSEX	82694	82391	82542	82642	82794	82894
NIFTY FUTURES	25423	25327	25375	25411	25459	25495
BANK NIFTY	55493	54999	55246	55394	55641	55788
CNX IT	36447	36082	36264	36437	36619	36792
CNX MIDCAP	58849	58499	58674	58870	59045	59241
CNX SMALLCAP	18423	18294	18359	18404	18469	18515
INDIA VIX	10.25	9.34	9.79	10.08	10.53	10.82

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 18-09-2025

ANGELONE, RBLBANK, OFSS

TECHNICAL VIEWS



NIFTY

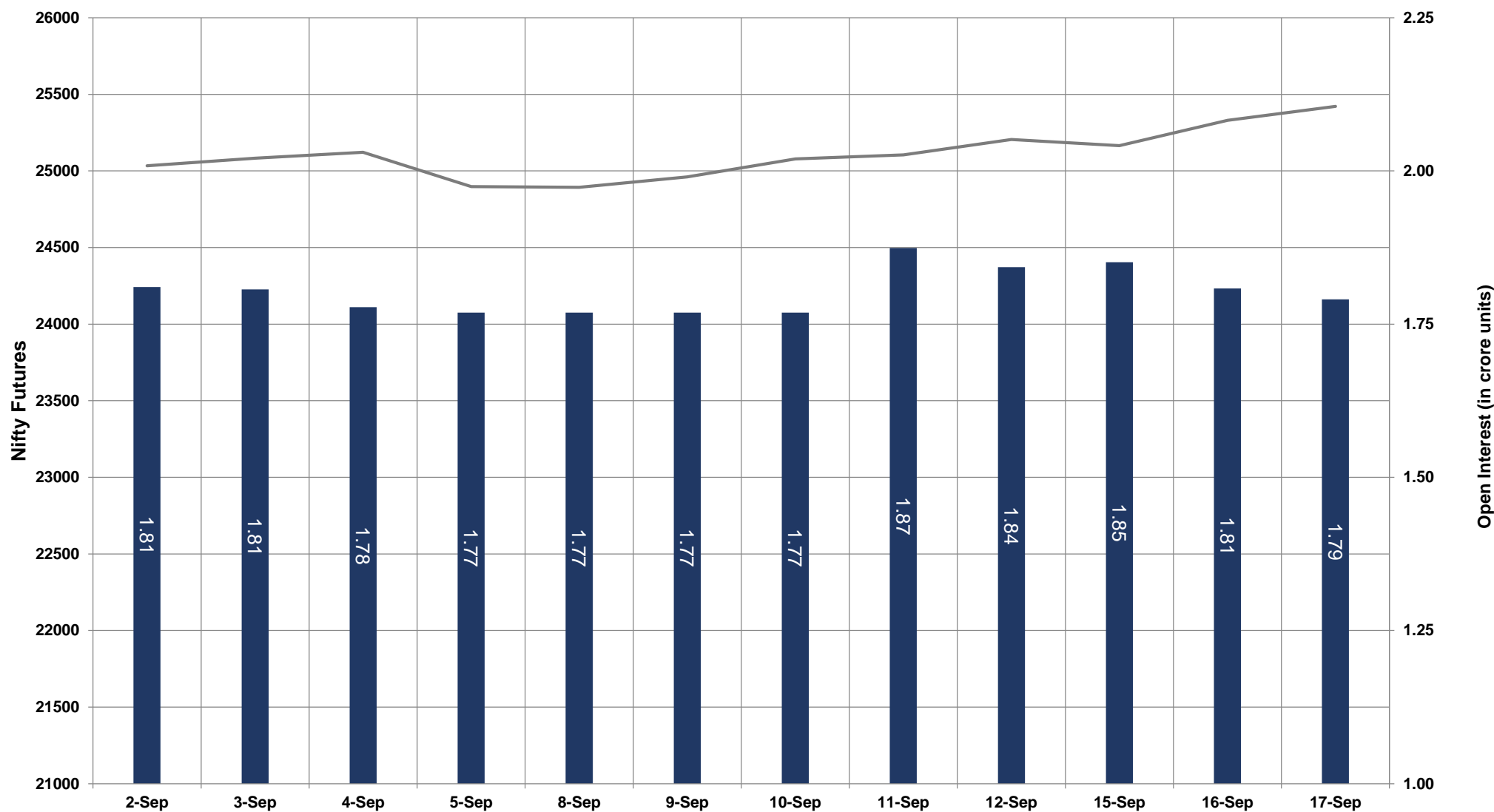


- Nifty Cash = **25330.25(0.36%)**
- Resistance levels = **25400** and **25500**
- Support levels = **25150** and **25000**

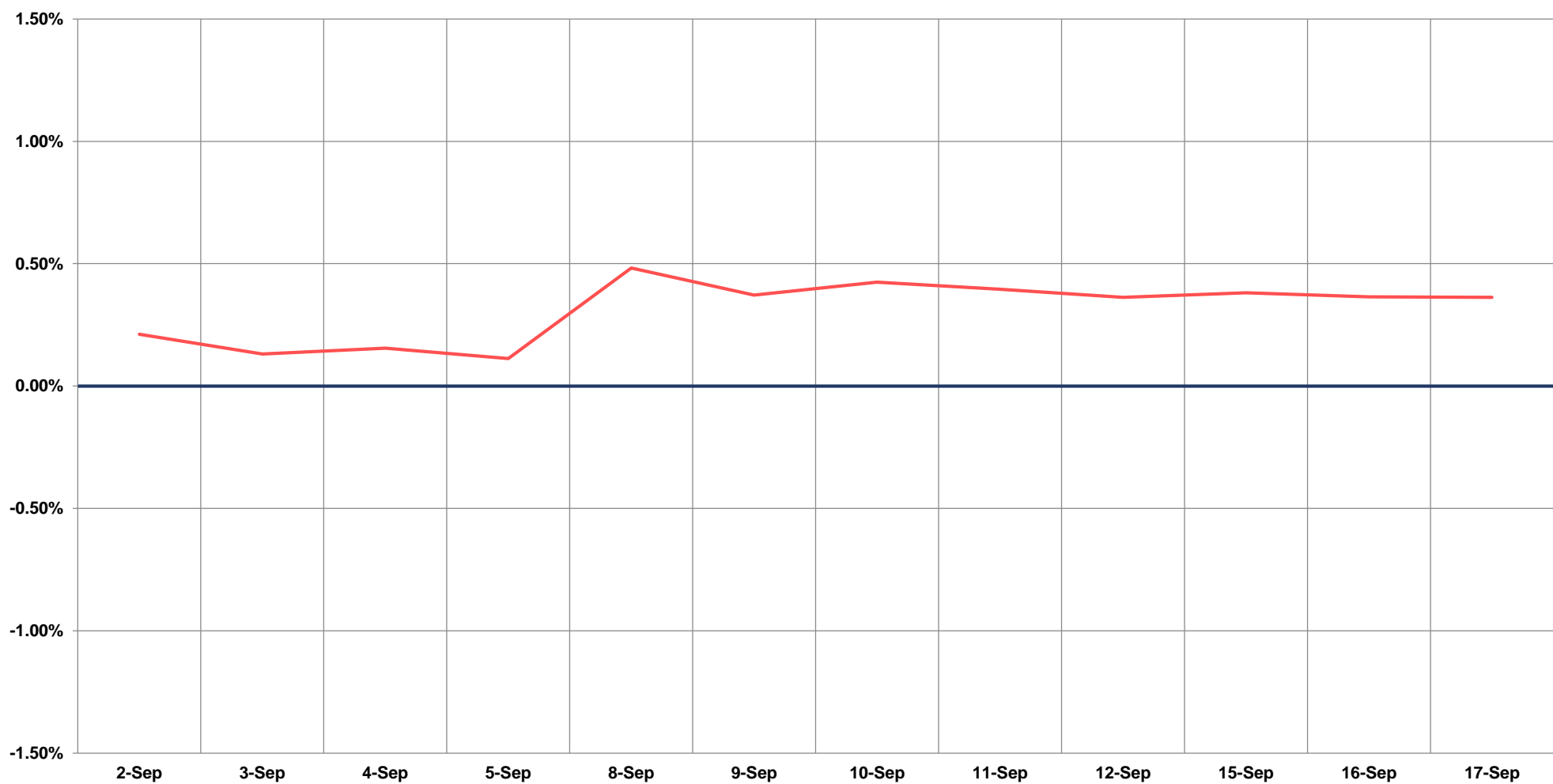
TECHNICAL VIEWS



NIFTY FUTURES



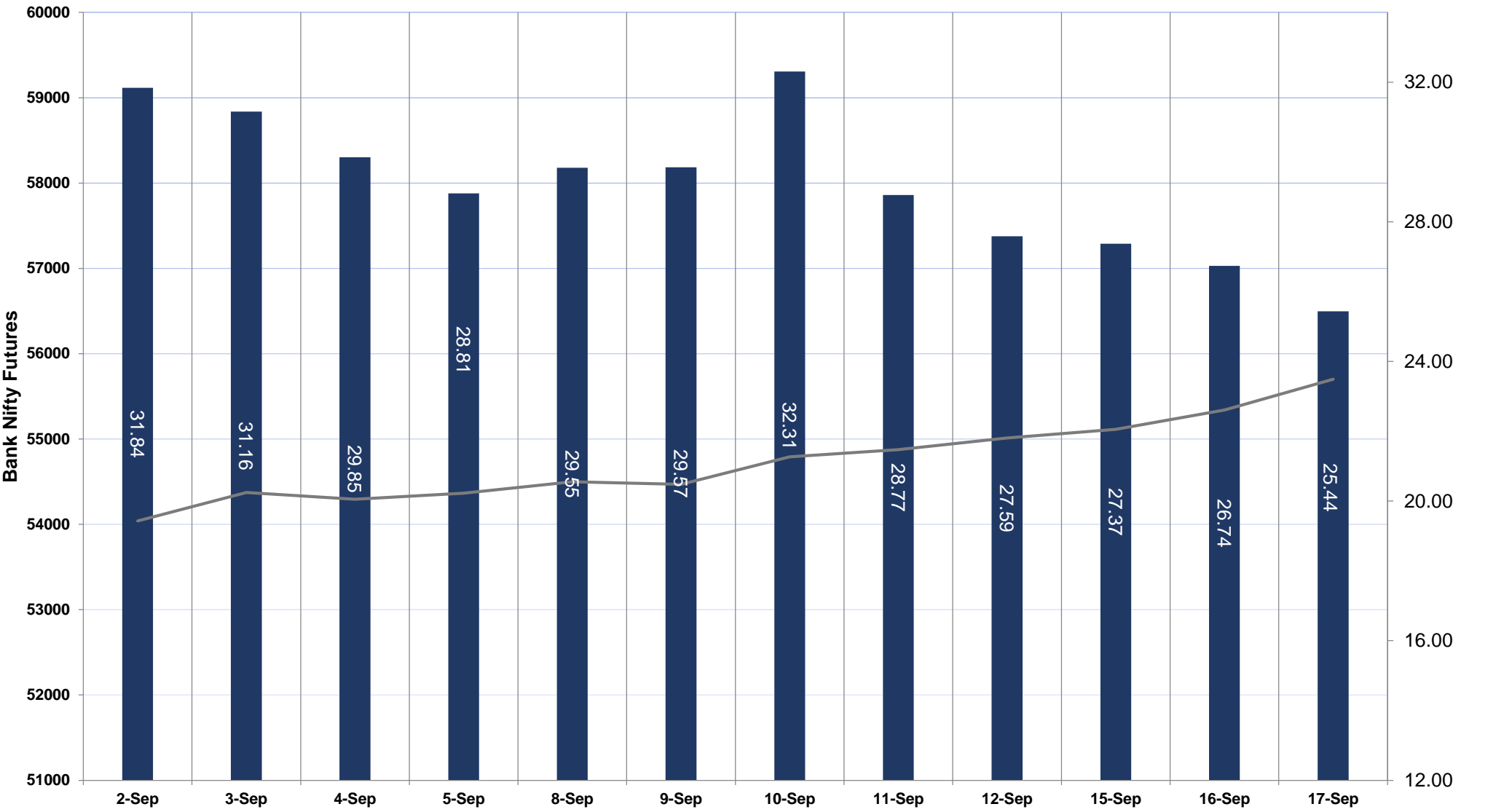
SPREAD: FUTURE & SPOT



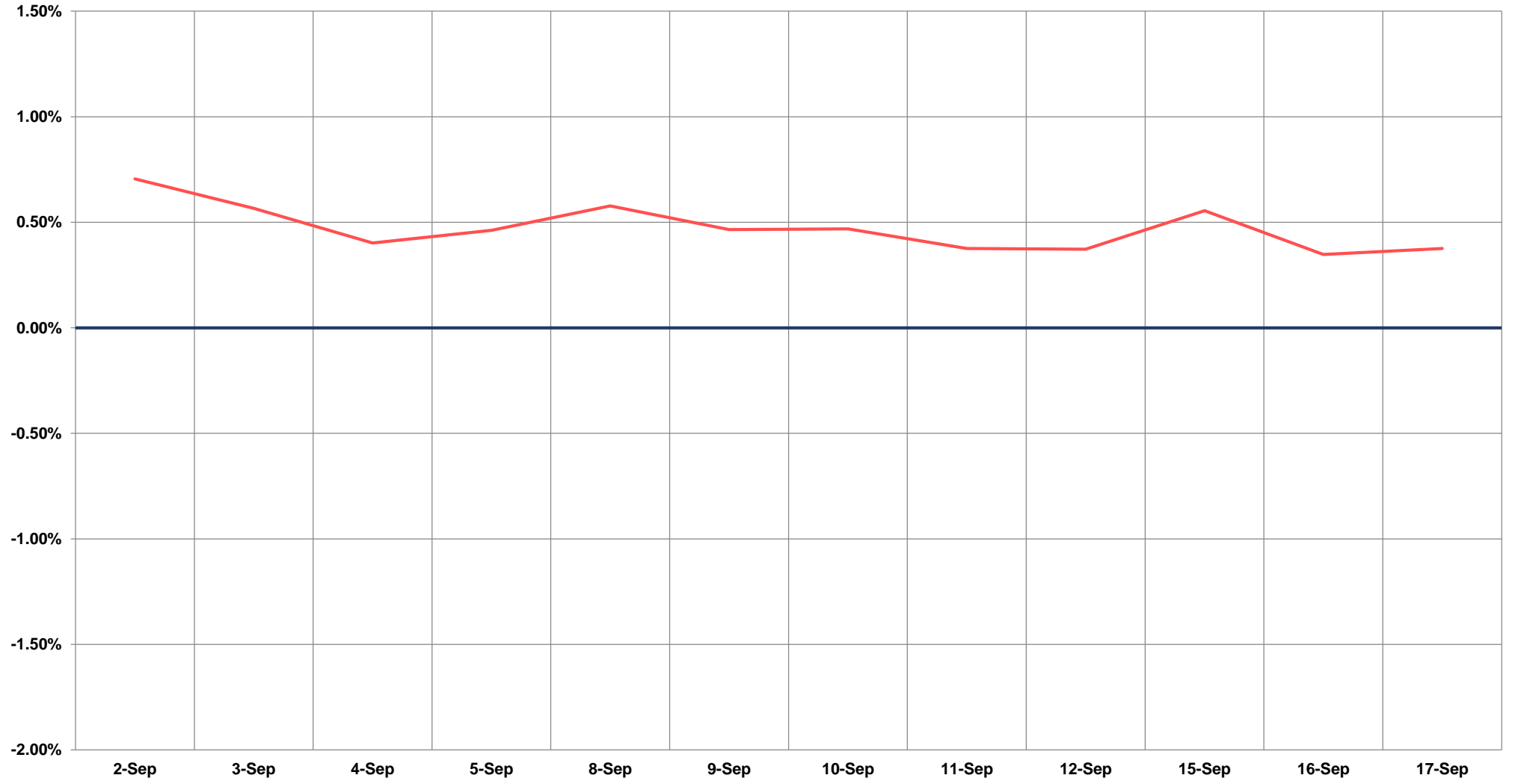
TECHNICAL VIEWS



BANK NIFTY FUTURES



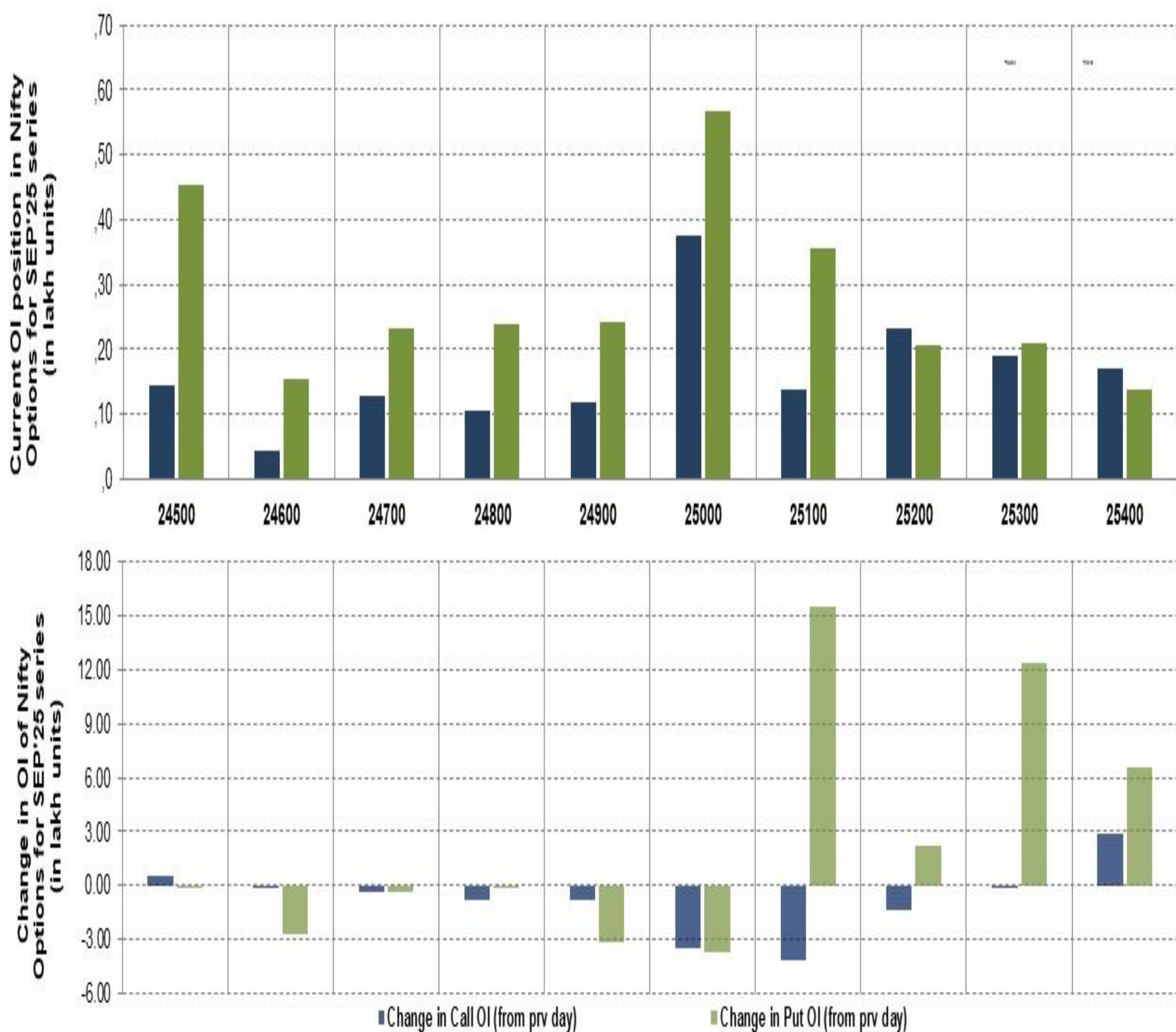
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an subtraction of 0.41 million in Open Interests is **Strike Price of 25100**
- **Most Active Nifty Put** with an addition of 1.54 millions in Open Interests is **Strike Price of 25100**
- **Maximum Open Interest an outstanding** was 3.67 millions for Calls at **Strike Price of 25000**
- **Maximum Open Interest an outstanding** was 5.67 millions for puts at **Strike Price of 25000**

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