



MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

Sep 18, 2025



Indian equity benchmarks ended in positive territory with significant gains on Wednesday, as sentiments remained buoyant amid optimism over ongoing trade talks with US as well as expectations that the Federal Reserve would cut interest rates later in the day. Markets made positive start and remained higher throughout the session, supported by positive discussions on trade deal with US officials. The Commerce Ministry said that the discussions with visiting US Chief Negotiator Brendan Lynch on the proposed bilateral trade agreement were positive and forward looking.

Some of the important factors in trade:

Foreign fund inflows: Some support came as exchange data showed Foreign institutional investors (FIIs) were turned buyers on Tuesday as they bought equities worth Rs 308.32 crore.

India set to attract investments worth Rs 80 lakh crore in coming years: Traders took some support with Union Minister for Ports, Shipping and Waterways, Sarbananda Sonowal's statement that India is set to attract investments worth Rs 80 lakh crore, generate over 1.5 crore jobs, and accelerate green shipping practices in the coming years.

India's exports to US falling due to high tariffs: Traders overlooked the Think tank GTRI's statement that India's exports to the US are falling as high tariffs imposed by the Trump administration have started eroding the price competitiveness of domestic goods in Washington.

Global front: European markets were trading mostly in green as traders took note of the latest U.K. inflation data reinforced expectations that the Bank of England will keep rates unchanged this week. Asian markets ended mixed amid U.S. President Donald Trump said he would speak to Chinese President Xi Jinping on Friday to confirm the details of the agreement.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	83014.96	320.25	0.39
NIFTY	25423.6	93.35	0.37
MIDCAP	46909.03	167.01	0.36
SMLCAP	54532.8	-4.28	-0.01
BSEFMC	20818.1	71.68	0.35
HEALTHCARE	45130.04	391.31	0.87
AUTO	61068.7	119.71	0.2
POWER	6783.06	9.03	0.13
REALTY	7134.77	-1.28	-0.02
BSE IT	36077.6	288.4	0.81
BANKEX	62653.6	226.25	0.36
OIL GAS	26646.5	15.64	0.06
METAL	33010.5	114.76	0.35
INDIA VIX	9.89	-0.36	-3.54

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1606	1426	102
BSE	2184	1994	173

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	8461	7680	10
NSE CASH	97994	101041	(3)
NSE F&O	137815	131677	5

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	22.233	3.39	1.33
SENSEX	22.94	4.41	1.16

KEY NUMBERS TRACKER



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

FII-DII*	Buy	Sell	Net
DII	13698	10354	3344
FII	11555	11143	412

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)

FII	Buy	Sell	Net
Ind. Futures	4180.42	2833.19	1347
Ind. Options	943177.08	932377.49	10800
Stk. Futures	17920.30	17697.72	223
Stk. Options	31710.19	31215.04	495

PUT-CALL RATIO

Index	Current	Previous
NIFTY	1.09	1.15
BANK NIFTY	1.10	1.09

DOLLAR INDEX

Dollar Index	Current	Previous	% Change
DXY	96.91	96.87	0.04

10-YEARS G-SEC YIELD

Country	Current	Previous	% Change
INDIA	6.506	6.468	0.62
USA	4.052	4.077	-0.61

KEY COMMODITIES TRACKER (in \$)

Commodity	Current	Change Points	% Change
Gold	3665.90	-3.33	-0.09
Silver	41,86	-0.05	-0.01
Crude-Oil	63.90	-0.05	-0.08
Brent-Crude	67.78	-0.9	-0.14

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES				
Expiry		Close	Change Points	% Change
26 AUG-25	USD-INR	88.18	0.29	0.33
26 AUG-25	EUR-INR	104.38	0.25	0.24
26 AUG-25	GBP-INR	120.35	0.39	0.32
26 AUG-25	JPY- INR	60	-0.15	-0.24

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS						
Index	Close	S2	S1	Pivot	R1	R2
NIFTY	25424	25282	25353	25401	25472	25519
SENSEX	83014	82517	82766	82953	83202	83390
NIFTY FUTURES	25511	25400	25456	25490	25546	25580
BANK NIFTY	55727	55340	55534	55685	55878	56029
CNX IT	36750	36382	36566	36815	37000	37249
CNX MIDCAP	59073	58580	58827	58972	59219	59364
CNX SMALLCAP	18477	18357	18417	18475	18535	18594
INDIA VIX	9.88	9.11	9.50	9.87	10.26	10.63

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 19-09-2025
ANGELONE, RBLBANK, HFCL

TECHNICAL VIEWS



NIFTY

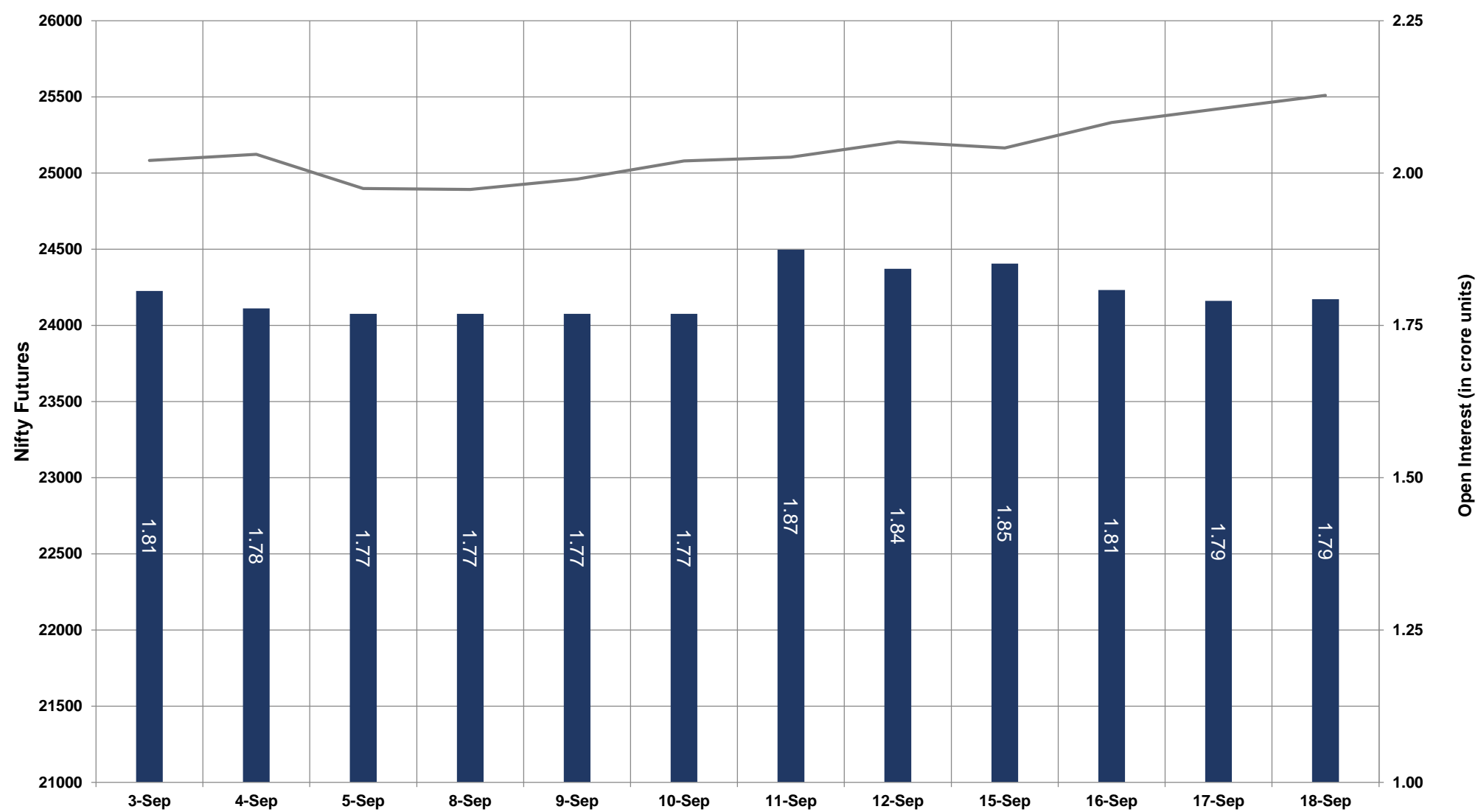


- Nifty Cash = **25423.60 (0.37%)**
- Resistance levels = **25500** and **25600**
- Support levels = **25250** and **25150**

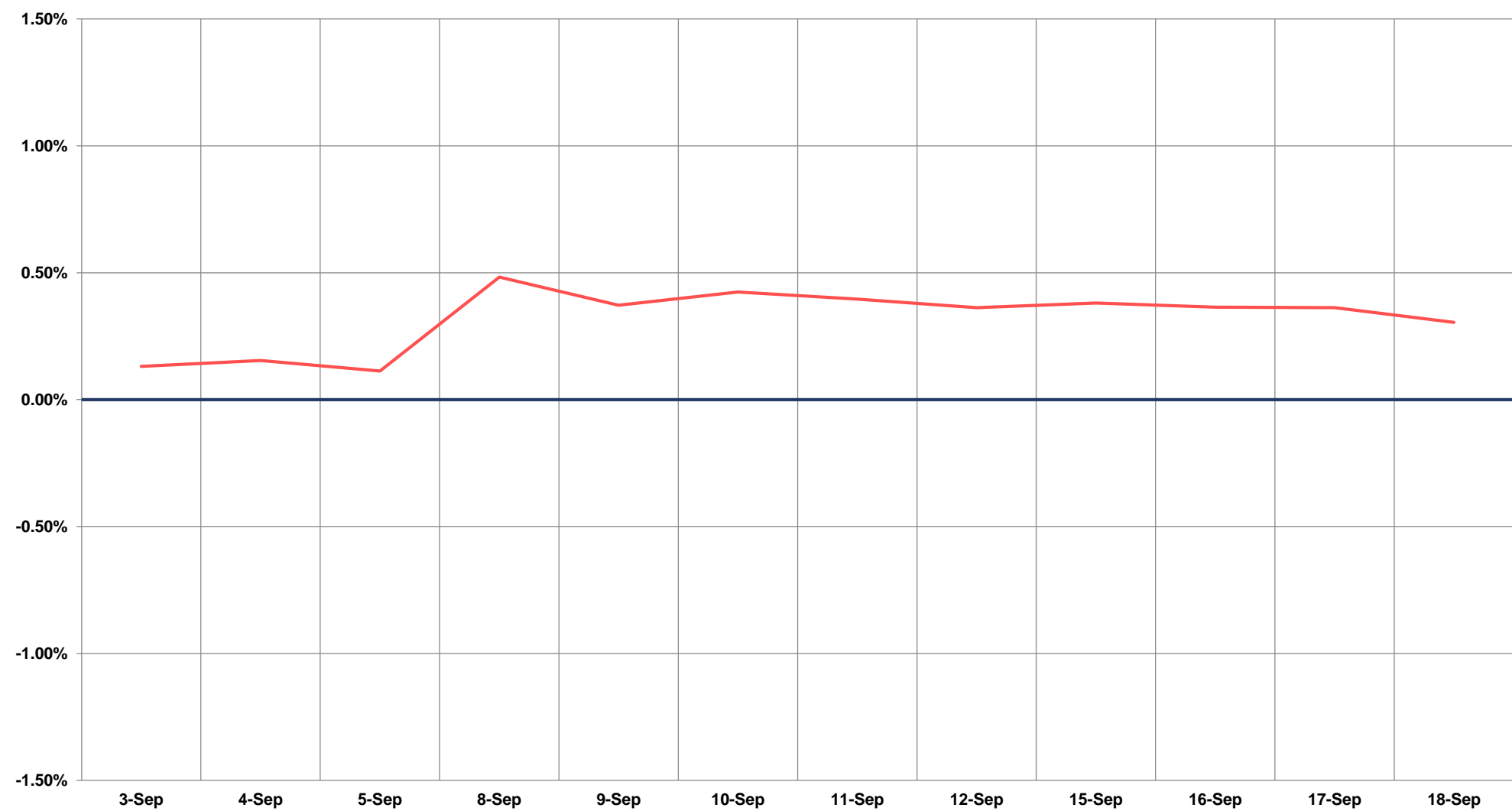
TECHNICAL VIEWS



NIFTY FUTURES



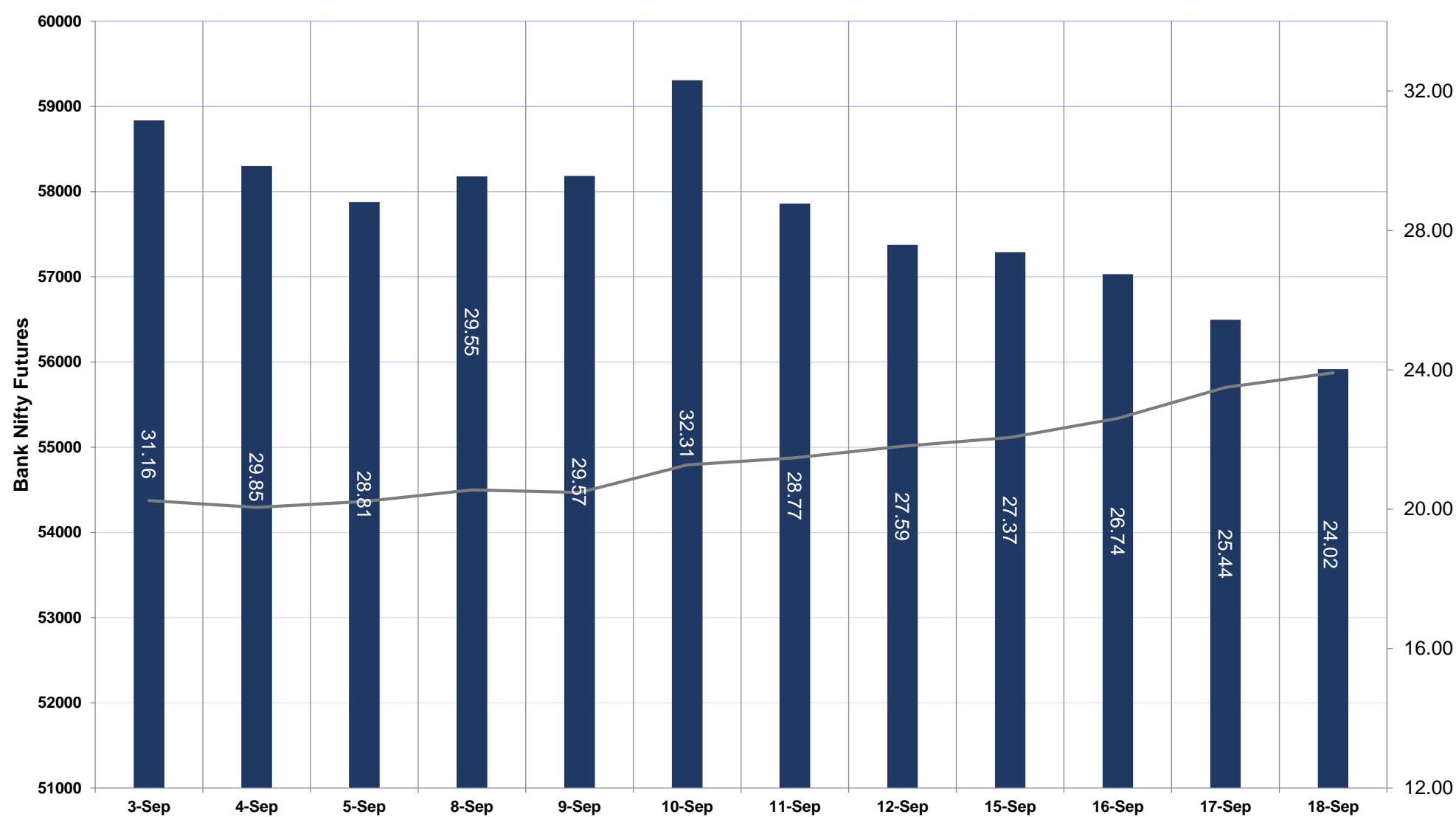
SPREAD: FUTURE & SPOT



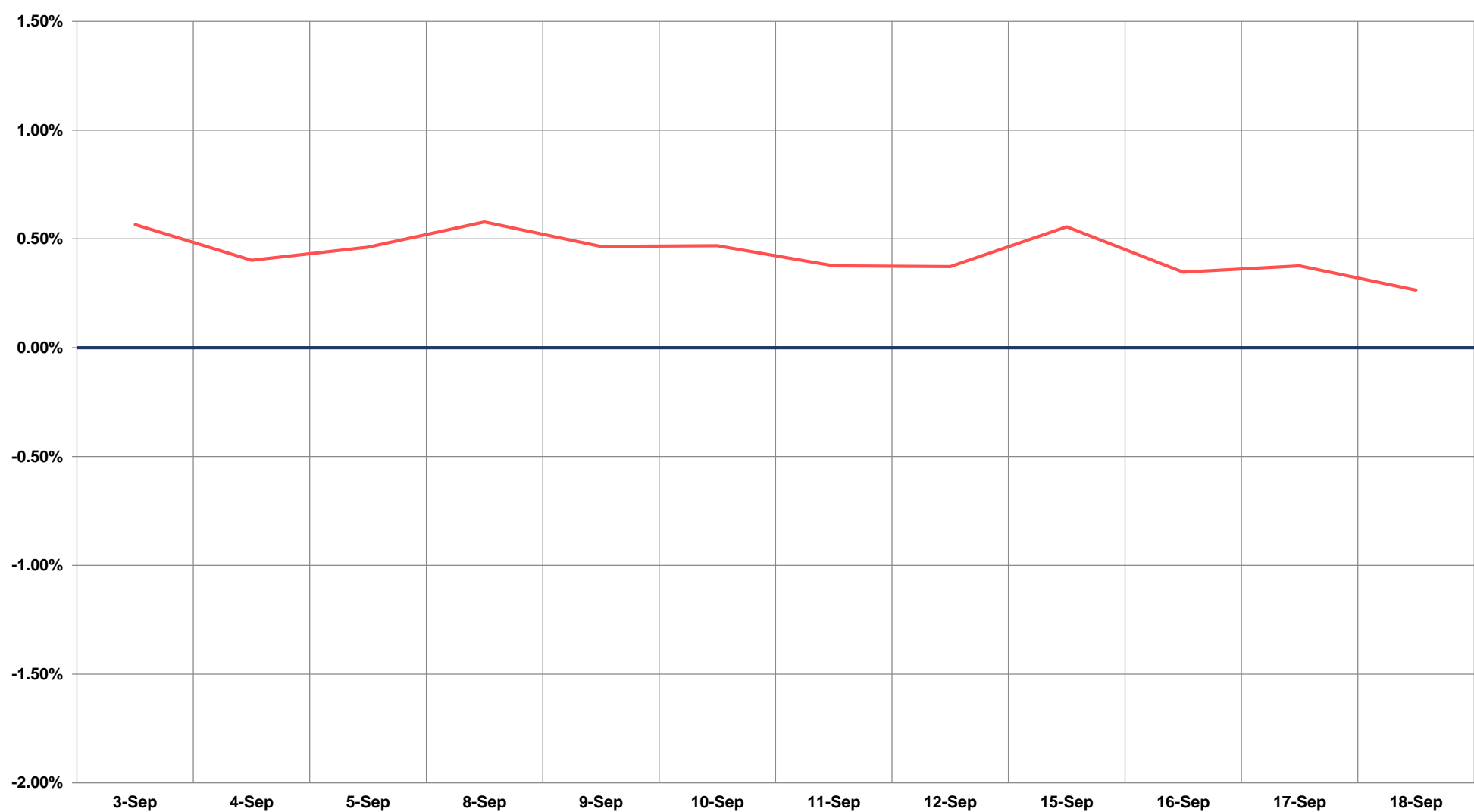
TECHNICAL VIEWS



BANK NIFTY FUTURES



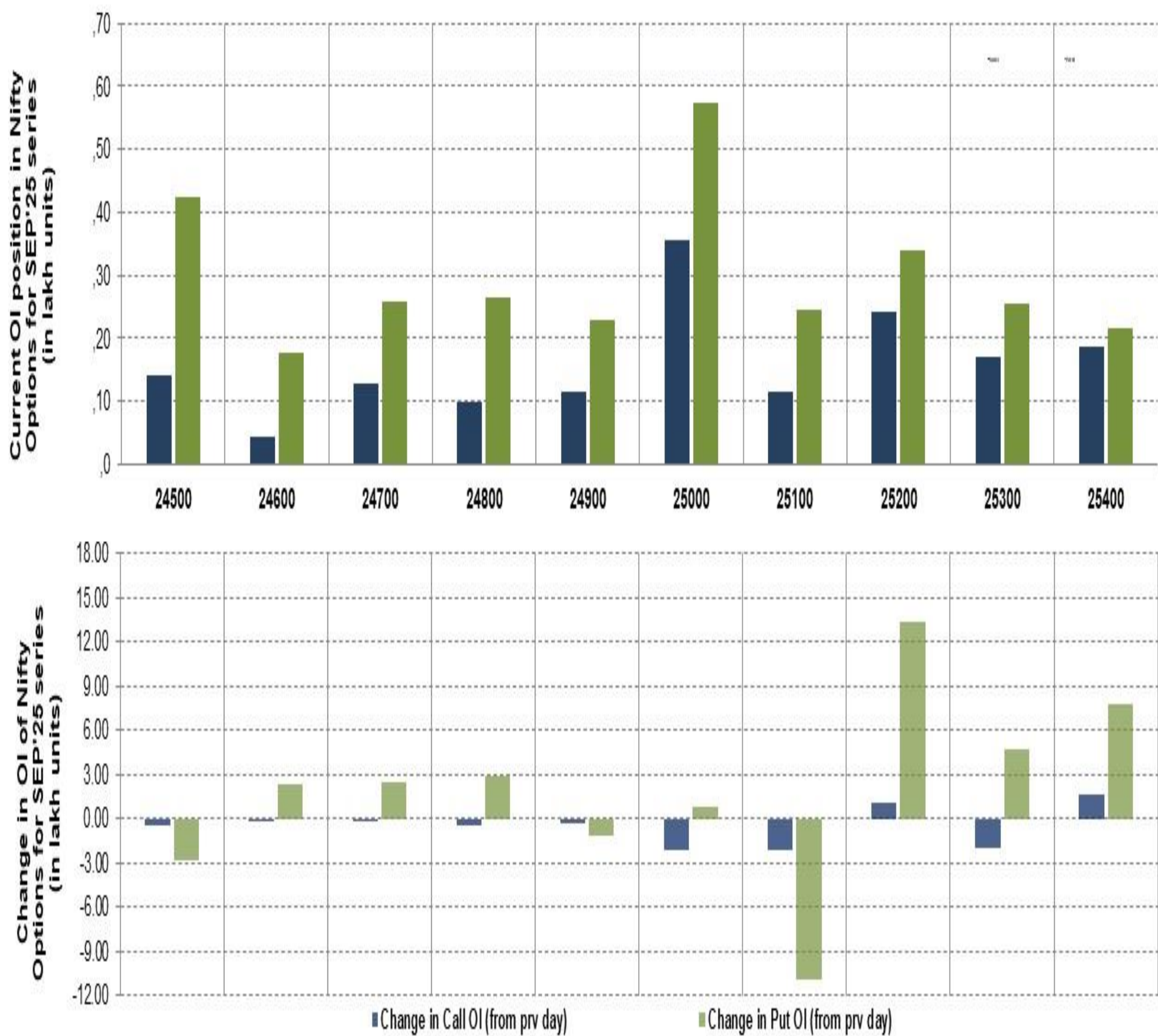
SPREAD: FUTURE & SPOT



TECHNICAL VIEWS



NIFTY OPTIONS



- **Most Active Nifty Call** with an subtraction of 0.22 million in Open Interests is **Strike Price of 25000**
- **Most Active Nifty Put** with an addition of 1.33 millions in Open Interests is **Strike Price of 25200**
- **Maximum Open Interest an outstanding** was 5.74 millions for Calls at **Strike Price of 25000**
- **Maximum Open Interest an outstanding** was 3.54 millions for puts at **Strike Price of 25000**

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