



# MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

Sep 19, 2025



Indian equity benchmarks snapped a three-day winning streak on Friday, weighed down by selling in IT, Banking, and FMCG stocks. Indices made a slightly negative start and extended their losses, as investors booked profits following the recent rally driven by encouraging progress in India-U.S. trade discussions and the U.S. Federal Reserve's 25 basis point rate cut. However, markets recovered slightly from the day's low points, but ended in negative territory.

Some of the important factors in trade:

Net direct tax collection grows 9.18% till September 17 this fiscal: Traders overlooked the government data which showed that net direct tax collection grew 9.18 per cent so far this fiscal to over Rs 10.82 lakh crore due to higher advance tax mop-up from corporates and slower refunds.

Solution to tariff issues with US likely to be arrived in next 8-10 weeks: Traders paid no heed towards Chief Economic Advisor V Anantha Nageswaran's statement that he expects that a solution to the tariff issues with the US is likely to be arrived in the next eight to ten weeks.

Pharma sector remained in limelight: Traders took note of rating firm Icria has said revenue of leading domestic pharmaceutical companies is set to expand by 7-9 per cent in the current fiscal (FY26) even as global headwinds and regulatory uncertainties cast a shadow over its largest export market, the US.

Global front: European markets were trading mostly in red, as investors overlooked data that showed U.K. retail sales increased for the third straight month in August. Asian markets ended mostly in red ahead of a phone call between U.S. President Donald Trump and Chinese President Xi Jinping scheduled for later in the day to finalize terms of a deal over TikTok's U.S. operations.

# MARKET SELFIE



## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	82626.23	-387.73	-0.47
NIFTY	25327.05	-96.55	-0.38
MIDCAP	46867.33	-41.7	-0.09
SMLCAP	54622.04	89.29	0.16
BSEFMC	20736.68	-81.39	-0.39
HEALTHCARE	45256.61	126.57	0.28
AUTO	60905.73	-162.97	-0.27
POWER	6871.44	88.38	1.3
REALTY	7167.73	32.96	0.46
BSE IT	35968.43	-109.12	-0.3
BANKEX	62367.2	-286.44	-0.46
OIL GAS	26825.46	179	0.67
METAL	33129.25	118.72	0.36
INDIA VIX	9.9675	0.0825	0.83

## ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	1598	1423	109
BSE	2037	2111	177

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	9623	8461	14
NSE CASH	138903	97994	42
NSE F&O	168345	137815	22

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	22.25	3.38	1.34
SENSEX	22.83	4.39	1.17

# KEY NUMBERS TRACKER



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

FII-DII*	Buy	Sell	Net
DII	14269	12315	1954
FII	36723	36371	352

Note: FPI & DII Figures are provisional

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

FII	Buy	Sell	Net
Ind. Futures	3127.68	3731.88	(604)
Ind. Options	1336867.88	1334215.06	2653
Stk. Futures	20622.61	21282.47	(660)
Stk. Options	30180.68	30628.79	(448)

## PUT-CALL RATIO

Index	Current	Previous
NIFTY	0.82	1.09
BANK NIFTY	1.03	1.10

## DOLLAR INDEX

Dollar Index	Current	Previous	% Change
DXY	97.67	97.35	0.33

## 10-YEARS G-SEC YIELD

Country	Current	Previous	% Change
INDIA	6.489	6.509	-0.31
USA	4.143	4.103	1.02

## KEY COMMODITIES TRACKER (in \$)

Commodity	Current	Change Points	% Change
Gold	3668.70	28.41	0.78
Silver	42.67	0.98	2.37
Crude-Oil	62.80	-0.85	-1.32
Brent-Crude	66.60	-0.87	-1.30



# CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES				
Expiry		Close	Change Points	% Change
26 AUG-25	USD-INR	88.14	-0.005	-0.005
26 AUG-25	EUR-INR	103.68	-0.67	-0.64
26 AUG-25	GBP-INR	119.00	-1.25	-104
26 AUG-25	JPY- INR	60.20	0.20	0.33

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS						
Index	Close	S2	S1	Pivot	R1	R2
NIFTY	25327	25203	25265	25348	25410	25493
SENSEX	82626	82204	82415	82697	82908	83190
NIFTY FUTURES	25411	25280	25346	25418	25483	25555
BANK NIFTY	55459	55168	55313	55501	55647	55834
CNX IT	36578	36139	36358	36590	36810	37041
CNX MIDCAP	59094	58935	59015	59131	59211	59327
CNX SMALLCAP	18505	18381	18443	18491	18553	18600
INDIA VIX	9.97	9.02	9.49	9.88	10.35	10.74

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	Sell

SECURITIES BAN IN F&O TRADES FOR 22-09-2025
ANGELONE, SAMMAANCAP, HFCL

# TECHNICAL VIEWS



## NIFTY

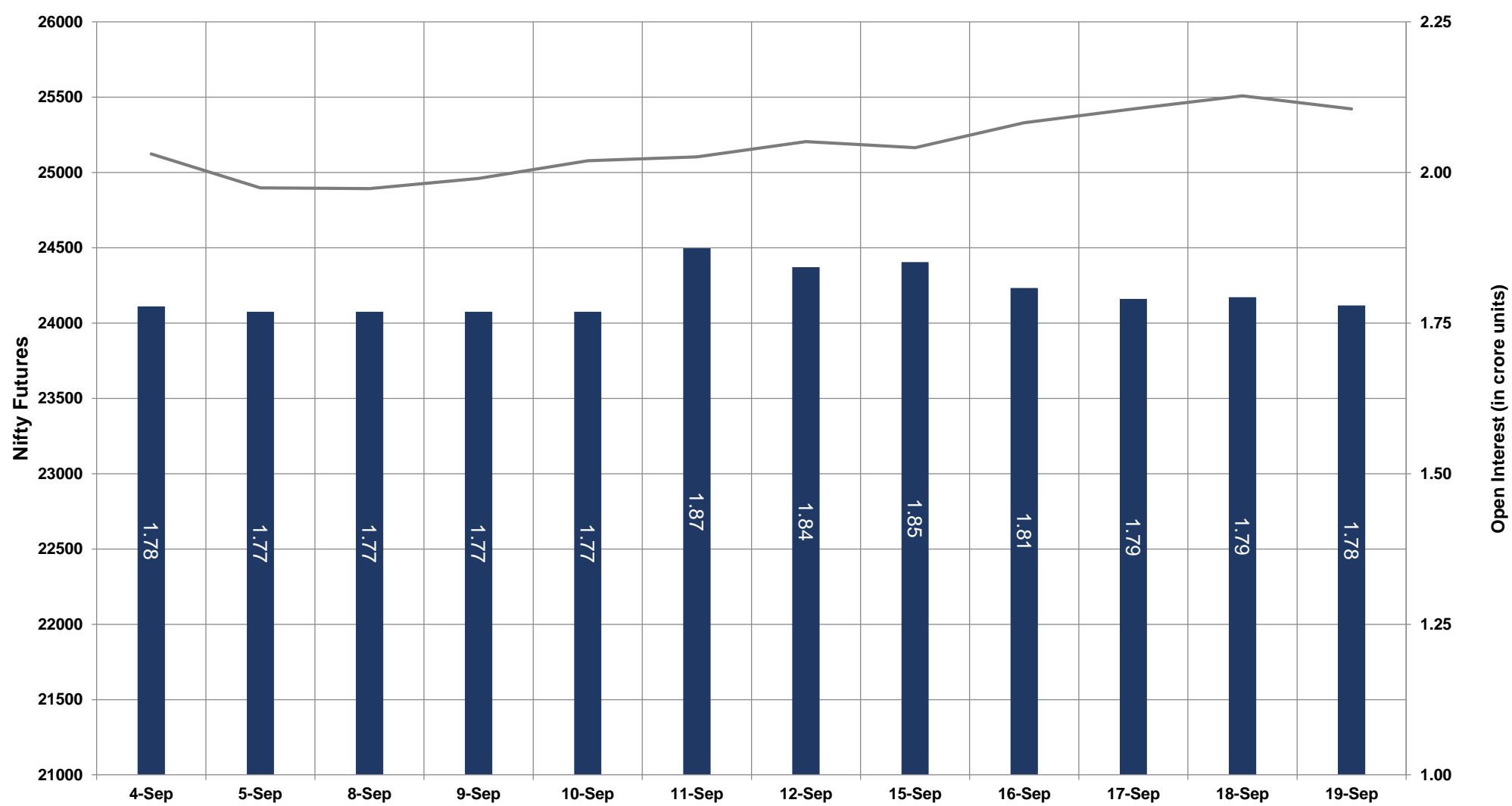


- Nifty Cash = **25327.05 (-0.38%)**
- Resistance levels = **25450** and **25500**
- Support levels = **25250** and **25150**

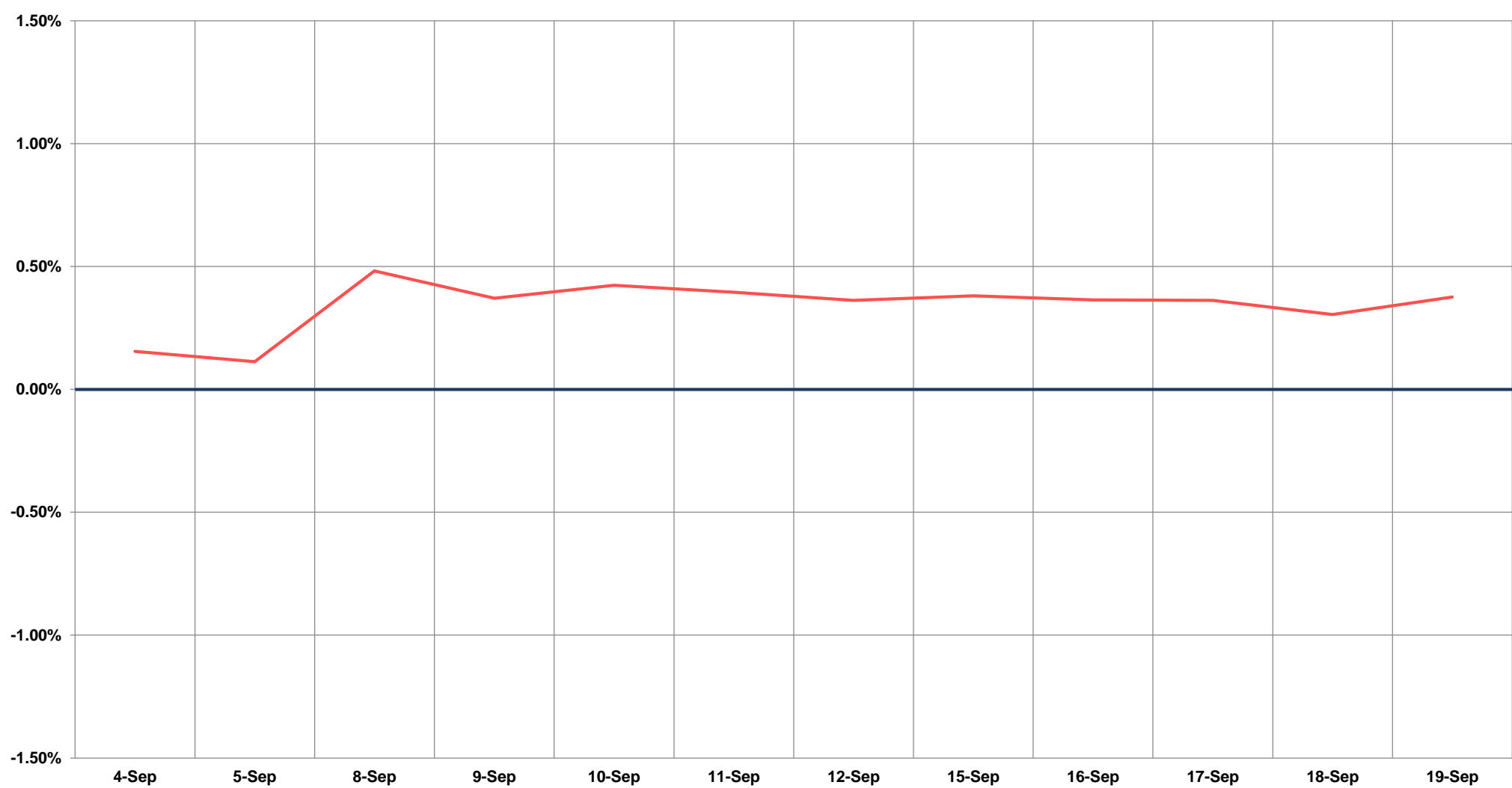
# TECHNICAL VIEWS



## NIFTY FUTURES



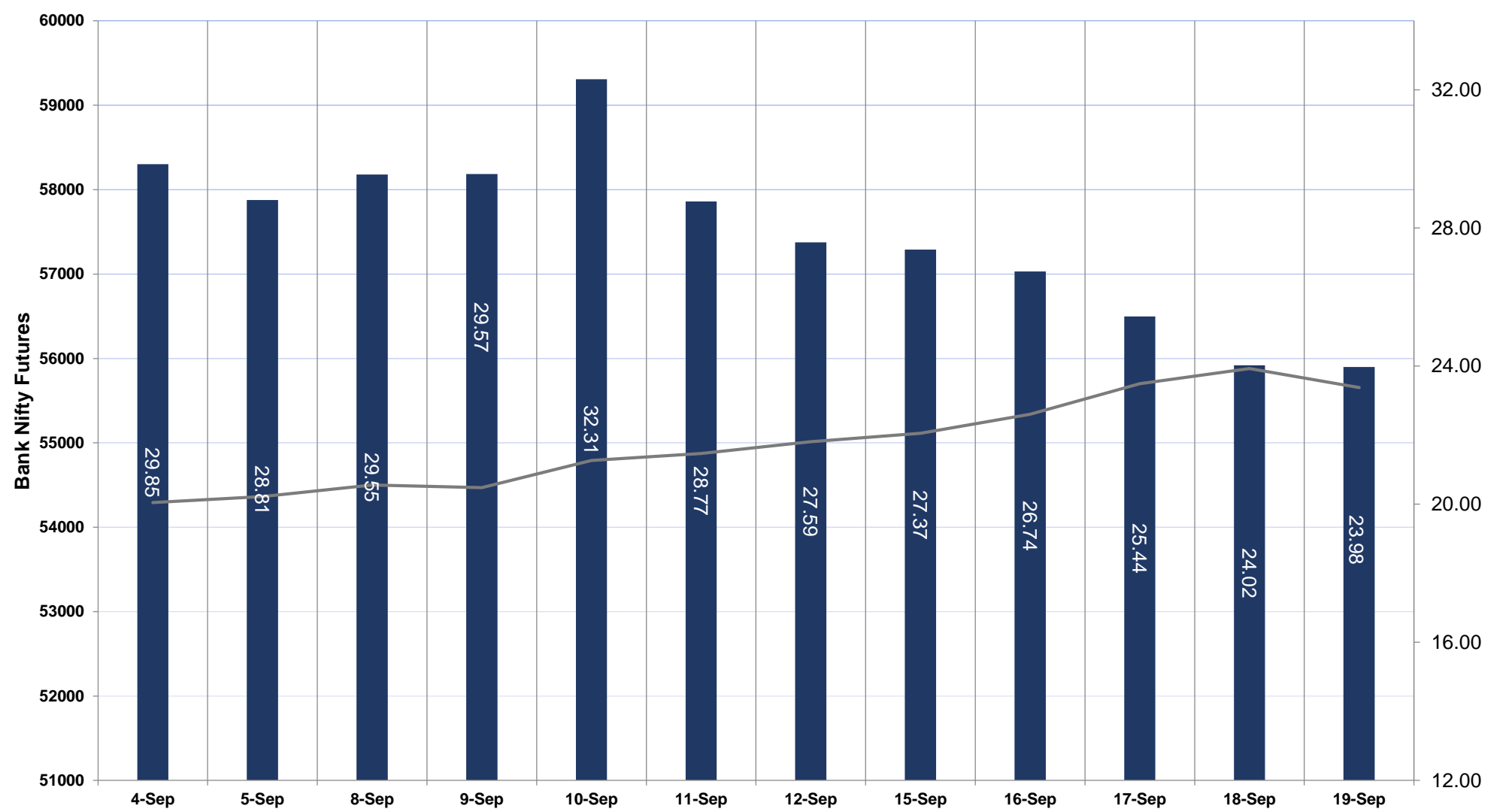
## SPREAD: FUTURE & SPOT



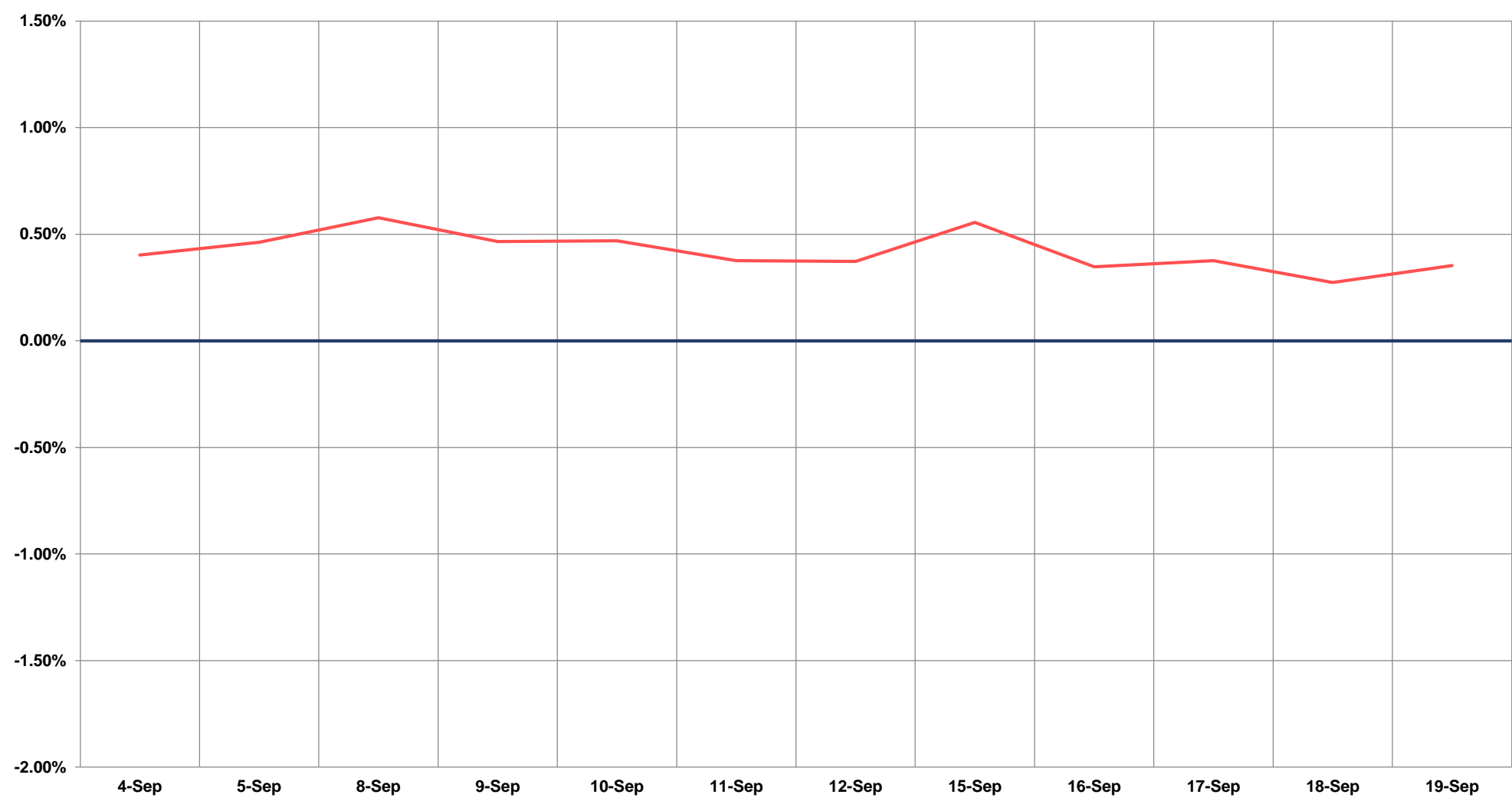
# TECHNICAL VIEWS



## BANK NIFTY FUTURES



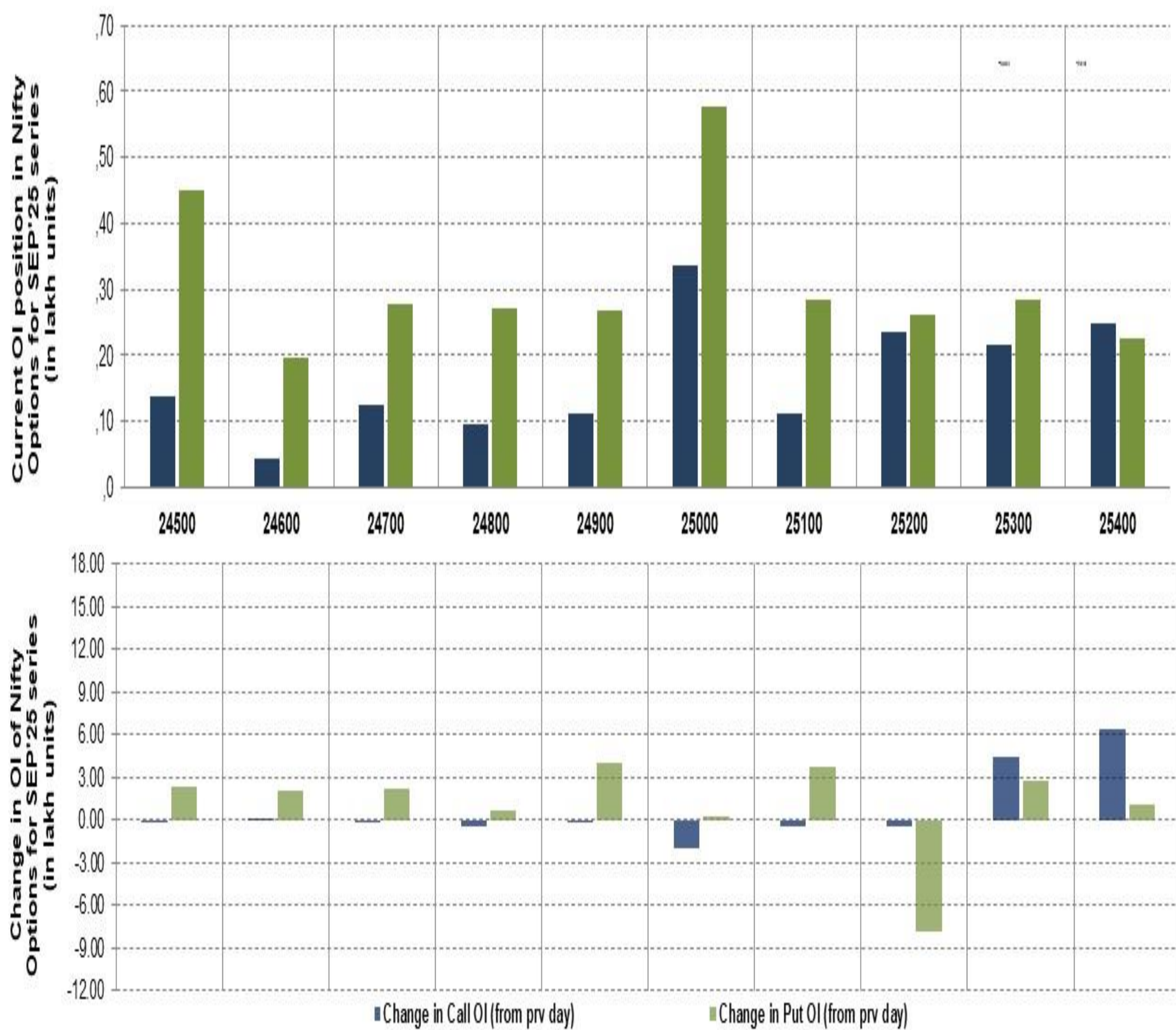
## SPREAD: FUTURE & SPOT







NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 0.65 million in Open Interests is **Strike Price of 25400**
- **Most Active Nifty Put** with an subtraction of 7.83 millions in Open Interests is **Strike Price of 25200**
- **Maximum Open Interest an outstanding** was 3.35 millions for Calls at **Strike Price of 25000**
- **Maximum Open Interest an outstanding** was 5.77 millions for puts at **Strike Price of 25000**

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