



# MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

Sep 24, 2025



Indian equity benchmarks extended their losing streak for a fourth consecutive session, dragged by selling in IT and Banking stocks. Markets made negative start amid renewed trade tensions and U.S. President Donald Trump blaming China and India during his UN General Assembly address, calling the two nations the primary funders of the Ukraine war. In last leg of trade, indices ended near day's low points.

Some of the important factors in trade:

**Foreign fund outflows:** Sentiments remained downbeat as Foreign institutional investors offloaded shares worth Rs 3,551.19 crore on a net basis on Tuesday.

**OECD raises India's 2025 GDP growth forecast to 6.7%:** Traders overlooked the Organization for Economic Cooperation and Development's (OECD) report in which it has raised India's Gross Domestic Product (GDP) growth by 40 bps to 6.7 per cent for fiscal year 2025-26 (FY26) from its earlier projection of 6.3 per cent in June -- driven by strong domestic demand and robust GST reforms.

**Indian delegation visits UK to deepen trade textile trade:** Trader took note of Indian delegation led by Neelam Shami Rao, Secretary, Ministry of Textiles, Government of India, is visiting London to showcase India's strength across the textile value chain and to deepen India-UK trade engagement.

**Global front:** European markets were trading red, after Federal Reserve Chair Jerome Powell in a speech last night said that equity prices are fairly highly valued by many measures. Asian markets ended mixed after several Federal Reserve officials, including Fed Chair Jerome Powell reiterated caution over further policy easing.

# MARKET SELFIE



## MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	81715.6	-386.47	-0.47
NIFTY	25056.9	-112.6	-0.45
MIDCAP	45971.5	-396.37	-0.85
SMLCAP	53774.1	-269.63	-0.5
BSEFMC	20398.9	22.4	0.11
HEALTHCARE	44299.5	-274.11	-0.61
AUTO	60379.9	-648.46	-1.06
POWER	6889.03	-73.71	-1.06
REALTY	6914.64	-174.84	-2.47
BSE IT	34529.9	-239.47	-0.69
BANKEX	62122.4	-502.97	-0.8
OIL GAS	26695.4	-161.28	-0.6
METAL	33339.3	-239.8	-0.71
INDIA VIX	10.5225	-0.1025	-0.96

## ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	990	2053	89
BSE	1540	2651	146

## MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	7804	7663	2
NSE CASH	94297	105317	(10)
NSE F&O	190323	197297	(4)

## KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	22.01	3.34	1.35
SENSEX	22.60	4.35	1.18

# KEY NUMBERS TRACKER



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

FII-DII*	Buy	Sell	Net
DII	11897	10653	1244
FII	10749	13207	(2458)

Note: FPI & DII Figures are provisional

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

FII	Buy	Sell	Net
Ind. Futures	4048.53	4646.37	(598)
Ind. Options	897622.39	901232.06	(3610)
Stk. Futures	27871.02	28344.45	(473)
Stk. Options	42961.21	42552.36	409

## PUT-CALL RATIO

Index	Current	Previous
NIFTY	0.78	0.76
BANK NIFTY	0.80	1.12

## DOLLAR INDEX

Dollar Index	Current	Previous	% Change
DXY	97.89	97.26	0.64

## 10-YEARS G-SEC YIELD

Country	Current	Previous	% Change
INDIA	6.48	6.46	0.25
USA	4.13	4.12	0.36

## KEY COMMODITIES TRACKER (in \$)

Commodity	Current	Change Points	% Change
Gold	3757.60	-6.00	-0.12
Silver	43.97	0.04	0.09
Crude-Oil	64.22	0.59	0.93
Brent-Crude	68.44	0.60	0.89

# CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES				
Expiry		Close	Change Points	% Change
26 AUG-25	USD-INR	88.73	-0.01	-0.01
26 AUG-25	EUR-INR	104.30	-0.42	-0.40
26 AUG-25	GBP-INR	119.67	-0.37	-0.30
26 AUG-25	JPY- INR	59.90	-0.21	-0.35

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS						
Index	Close	S2	S1	Pivot	R1	R2
NIFTY	25057	24956	25006	25078	25129	25200
SENSEX	81716	81352	81534	81790	81971	82227
NIFTY FUTURES	25112	25004	25058	25132	25186	25261
BANK NIFTY	55122	54754	54938	55224	55408	55695
CNX IT	34994	34679	34837	35015	35172	35351
CNX MIDCAP	57924	57450	57687	58117	58354	58784
CNX SMALLCAP	18070	17929	17999	18118	18189	18308
INDIA VIX	10.52	9.73	10.12	10.51	10.90	11.29

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

SECURITIES BAN IN F&O TRADES FOR 24-09-2025
RBLBANK, SAMMAANCAP, HFCL



# TECHNICAL VIEWS



## NIFTY

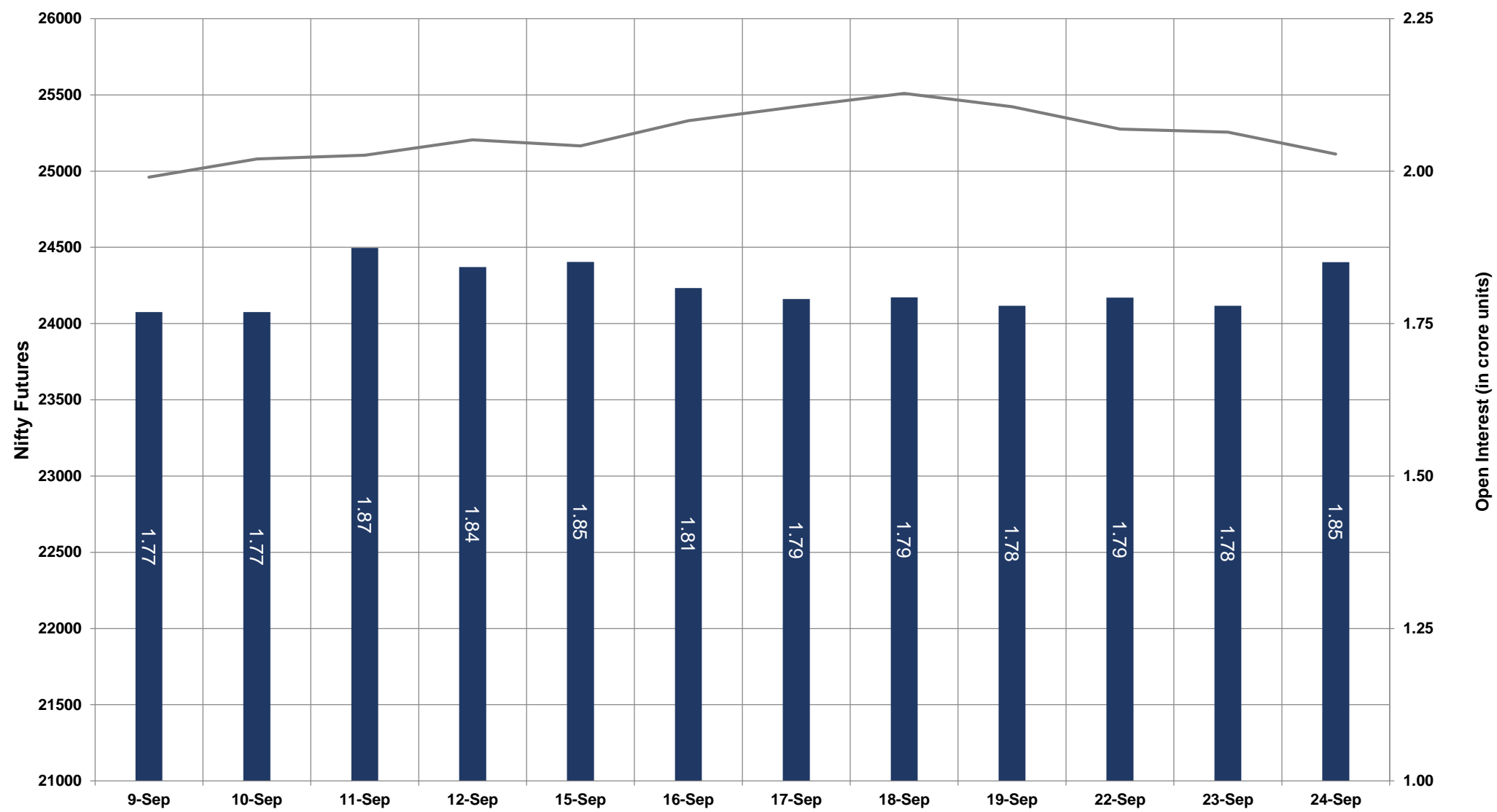


- Nifty Cash = **25056.90 (-0.45%)**
- Resistance levels = **25200** and **25300**
- Support levels = **25000** and **24900**

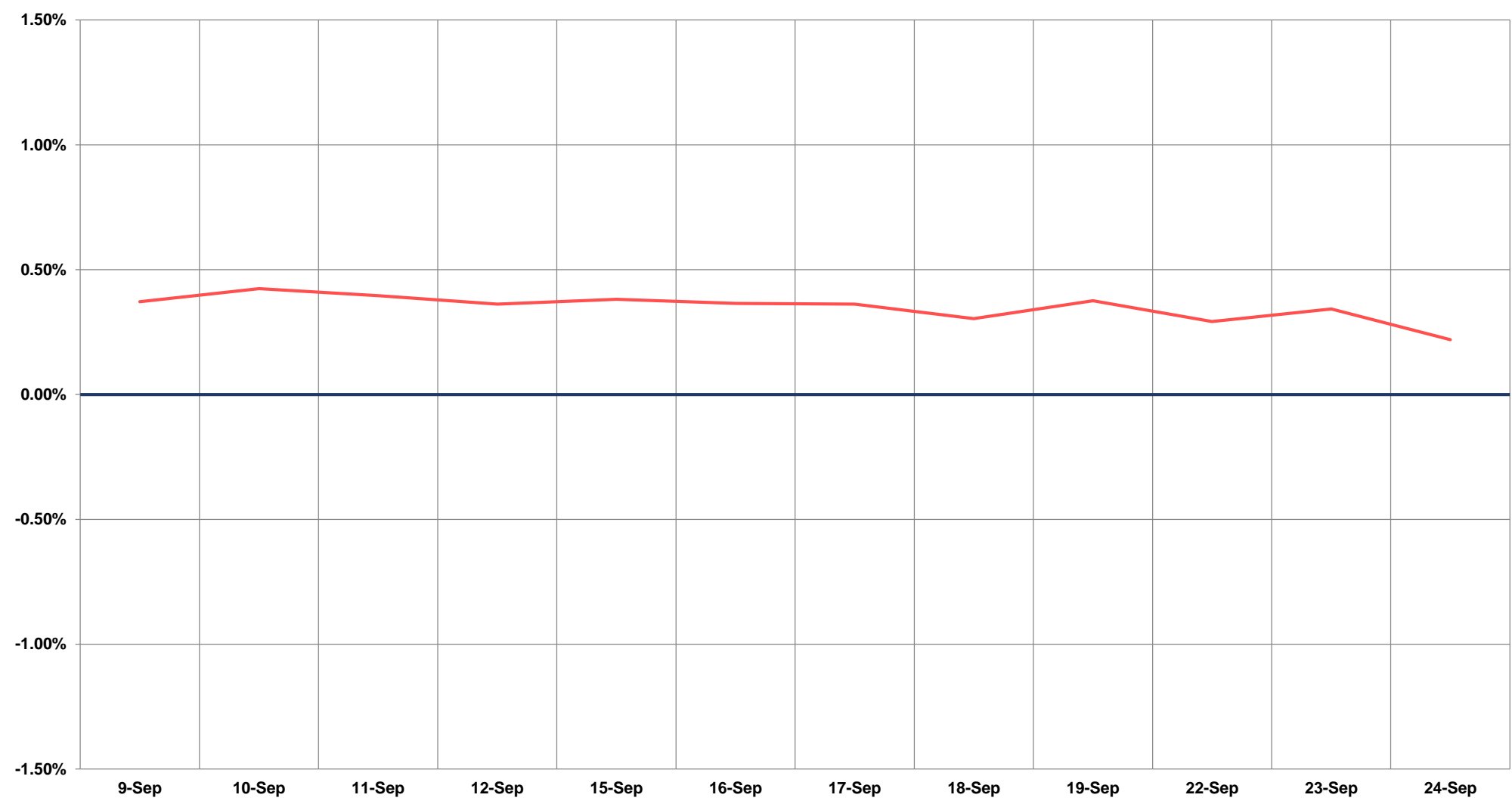
# TECHNICAL VIEWS



## NIFTY FUTURES



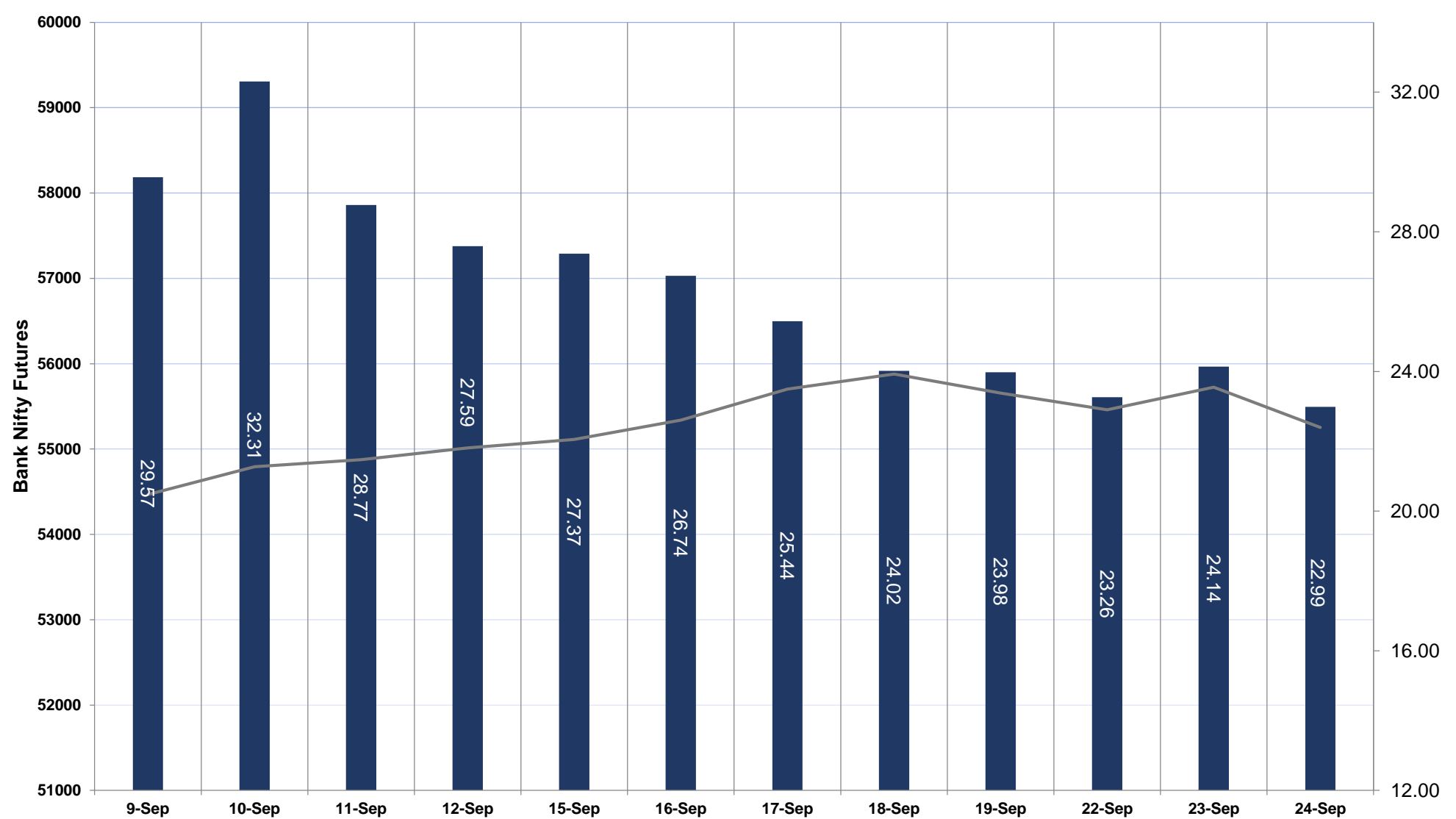
## SPREAD: FUTURE & SPOT



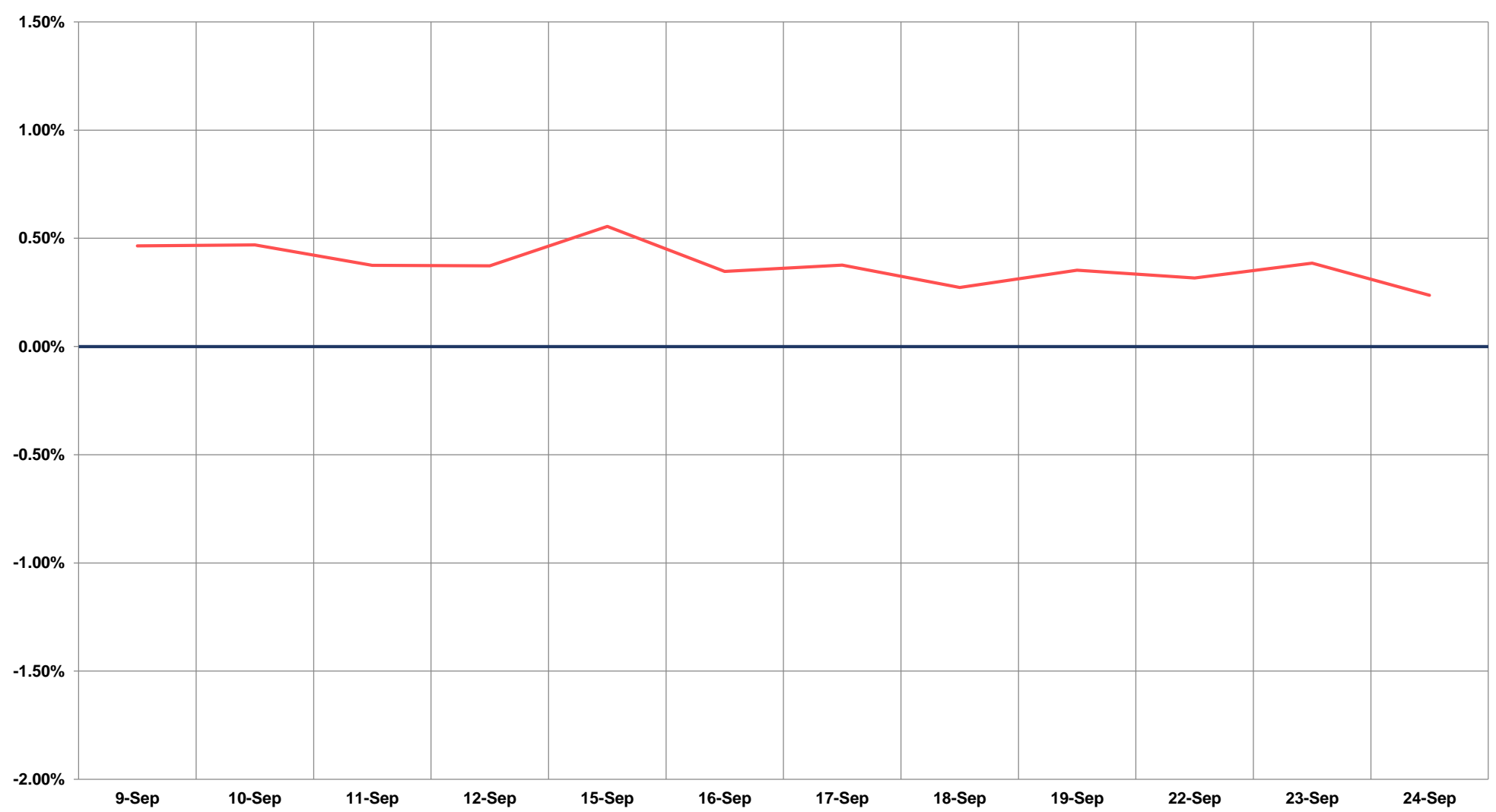
# TECHNICAL VIEWS



## BANK NIFTY FUTURES



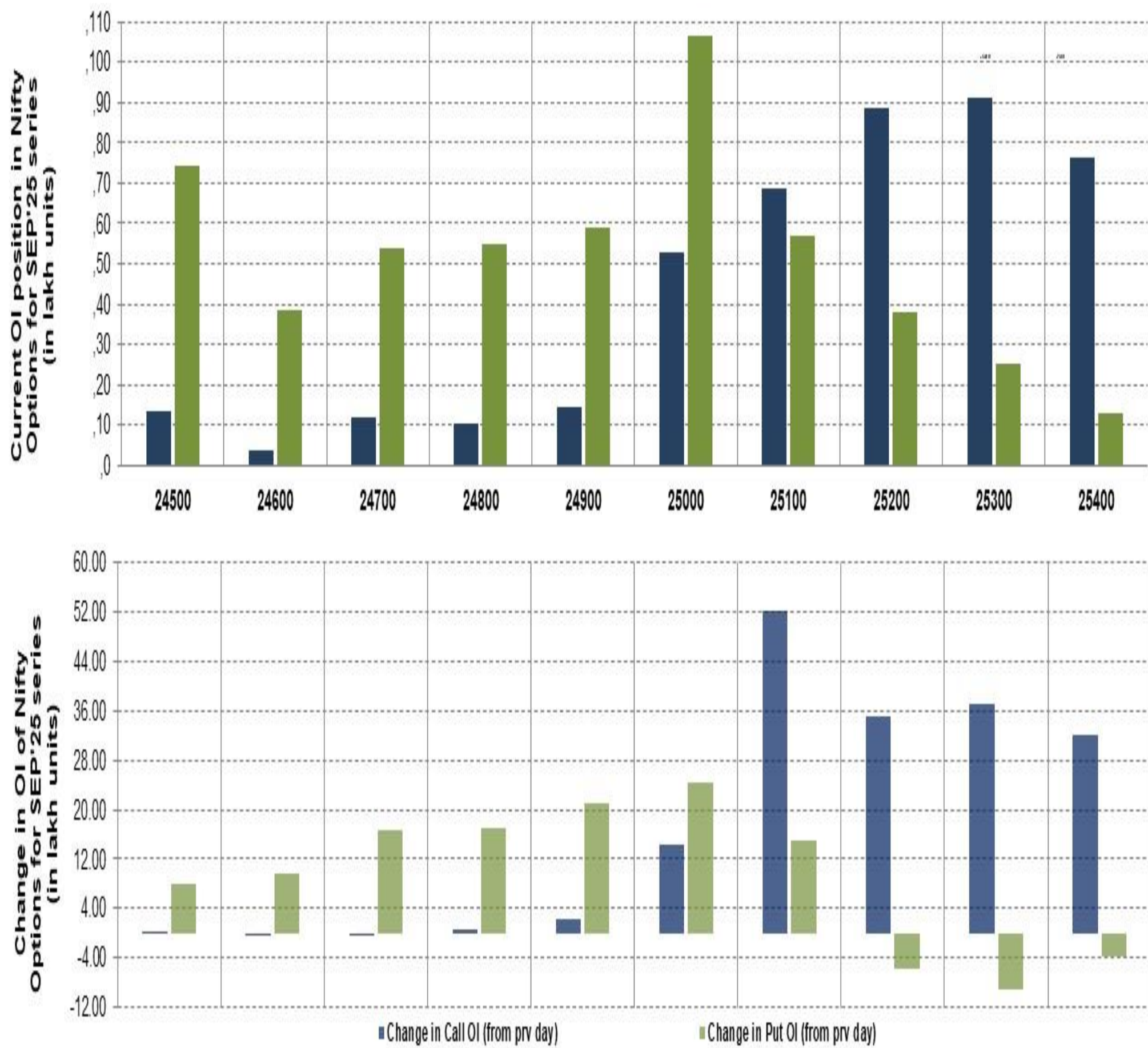
## SPREAD: FUTURE & SPOT







NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 5.21 million in Open Interests is **Strike Price of 25100**
- **Most Active Nifty Put** with an addition of 2.45 millions in Open Interests is **Strike Price of 25000**
- **Maximum Open Interest an outstanding** was 9.10 millions for Calls at **Strike Price of 25300**
- **Maximum Open Interest an outstanding** was 10.6 millions for puts at **Strike Price of 25000**

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