



MORNING MANTRA

WHAT'S RISING

BULLS

BEARS

WHAT'S FALLING

Daily Derivatives & Market Report

Sep 25, 2025



Indian equity benchmarks closed near their day's low points on Thursday, with both the Nifty and Sensex declining for a fifth consecutive session, weighed down by losses in realty and information technology (IT) stocks. After making a cautious start, indices traded near neutral lines for most part of the session amid persistent foreign fund outflows. In dying hours of the trade, markets added some losses and ended with cut of over half a percent. Traders avoided any long positions ahead of India's industrial production data, scheduled for release on September 29.

Some of the important factors in trade:

Continued FIIs outflows: Traders were cautious as Foreign institutional investors (FIIs) offloaded shares worth Rs 2,425.75 crore on a net basis on Wednesday.

GST reform to promote ease of doing business, strengthen growth drivers: Traders took note of RBI bulletin stating that the GST reform will have a positive impact on the Indian economy by promoting ease of doing business, lowering retail prices, and strengthening consumption growth drivers.

Jaishankar holds bilateral talks with counterparts from Mexico, Cyprus, Pacific nations: Traders overlooked External Affairs Minister S Jaishankar held a series of bilateral meetings with his counterparts from Mexico, Cyprus, and several Pacific Island nations on the sidelines of the 80th session of the United Nations General Assembly, reaffirming India's commitment to strengthening global partnerships.

Global front: European markets were trading in red, amid sticky inflation and a slowing job market clouded the outlook for U.S. interest rates. Asian markets ended mostly in red as investors awaited more U.S. economic data, including jobless claims and PCE inflation data for directional cues.

MARKET SELFIE



MARKET SUMMARY

Domestic Indices	Close	Points	% Change
SENSEX	81159.68	-555.95	-0.68
NIFTY	24890.85	-166.05	-0.66
MIDCAP	45641.47	-330.01	-0.72
SMLCAP	53372.88	-401.19	-0.75
BSEFMC	20277.49	-121.37	-0.59
HEALTHCARE	43987.98	-311.5	-0.7
AUTO	59819.56	-560.36	-0.93
POWER	6794.2	-94.83	-1.38
REALTY	6797.12	-117.52	-1.7
BSE IT	34149.55	-380.36	-1.1
BANKEX	61965.97	-156.4	-0.25
OIL GAS	26647.56	-47.81	-0.18
METAL	33395.75	56.47	0.17
INDIA VIX	10.7825	0.26	2.47

ADVANCE - DECLINE

Index	Advance	Decline	Unchanged
NSE	911	2123	90
BSE	1392	2793	145

MARKET TURNOVER (₹ in Crs)

Segment	Current	Previous	Net %
BSE CASH	7188	7804	(8)
NSE CASH	100235	94297	6
NSE F&O	383442	190323	101

KEY INDICES RATIOS

INDEX	P/E	P/B	Dividend Yield
NIFTY	22.86	3.32	1.36
SENSEX	22.45	4.33	1.18

KEY NUMBERS TRACKER



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

FII-DII*	Buy	Sell	Net
DII	15079	9973	5106
FII	14746	19844	(5098)

Note: FPI & DII Figures are provisional

FII ACTIVITY IN DERIVATIVES SEGMENT (₹ in Crs)

FII	Buy	Sell	Net
Ind. Futures	6998.47	7508.00	(510)
Ind. Options	1026139.71	1020583.40	5556
Stk. Futures	151574.96	151798.01	(223)
Stk. Options	44608.21	43344.75	1263

PUT-CALL RATIO

Index	Current	Previous
NIFTY	0.58	0.78
BANK NIFTY	0.77	0.80

DOLLAR INDEX

Dollar Index	Current	Previous	% Change
DXY	98.40	97.87	0.54

10-YEARS G-SEC YIELD

Country	Current	Previous	% Change
INDIA	6.49	6.48	0.17
USA	4.19	4.13	1.01

KEY COMMODITIES TRACKER (in \$)

Commodity	Current	Change Points	% Change
Gold	3734.54	-8.35	-0.22
Silver	44.72	0.80	1.80
Crude-Oil	64.86	0.04	0.06
Brent-Crude	69.21	0.10	0.14

CURRENCY FUTURES & INDEX TRENDS TRACKER



CURRENCY FUTURES				
Expiry		Close	Change Points	% Change
26 AUG-25	USD-INR	88.69	-0.03	-0.03
26 AUG-25	EUR-INR	104.18	-0.12	-0.12
26 AUG-25	GBP-INR	119.09	-0.44	-0.37
26 AUG-25	JPY- INR	59.62	-0.34	-0.56

INDICES – SUPPORT-RESISTANCE-PIVOT LEVELS						
Index	Close	S2	S1	Pivot	R1	R2
NIFTY	24891	24740	24815	24954	25030	25168
SENSEX	81160	80617	80888	81364	81636	82112
NIFTY FUTURES	24968	24839	24904	25018	25082	25197
BANK NIFTY	54976	54679	54827	55052	55201	55425
CNX IT	34548	34068	34308	34700	34940	35332
CNX MIDCAP	57556	57017	57287	57741	58010	58465
CNX SMALLCAP	17967	17802	17884	18030	18113	18259
INDIA VIX	10.78	10.03	10.41	10.65	11.03	11.27

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	Sell	Neutral	Neutral
CNX MIDCAP	Neutral	Buy	Buy
CNX SMALLCAP	Neutral	Buy	Buy
INDIA VIX	Neutral	Sell	Sell

SECURITIES BAN IN F&O TRADES FOR 26-09-2025
RBLBANK, SAMMAANCAP

TECHNICAL VIEWS



NIFTY

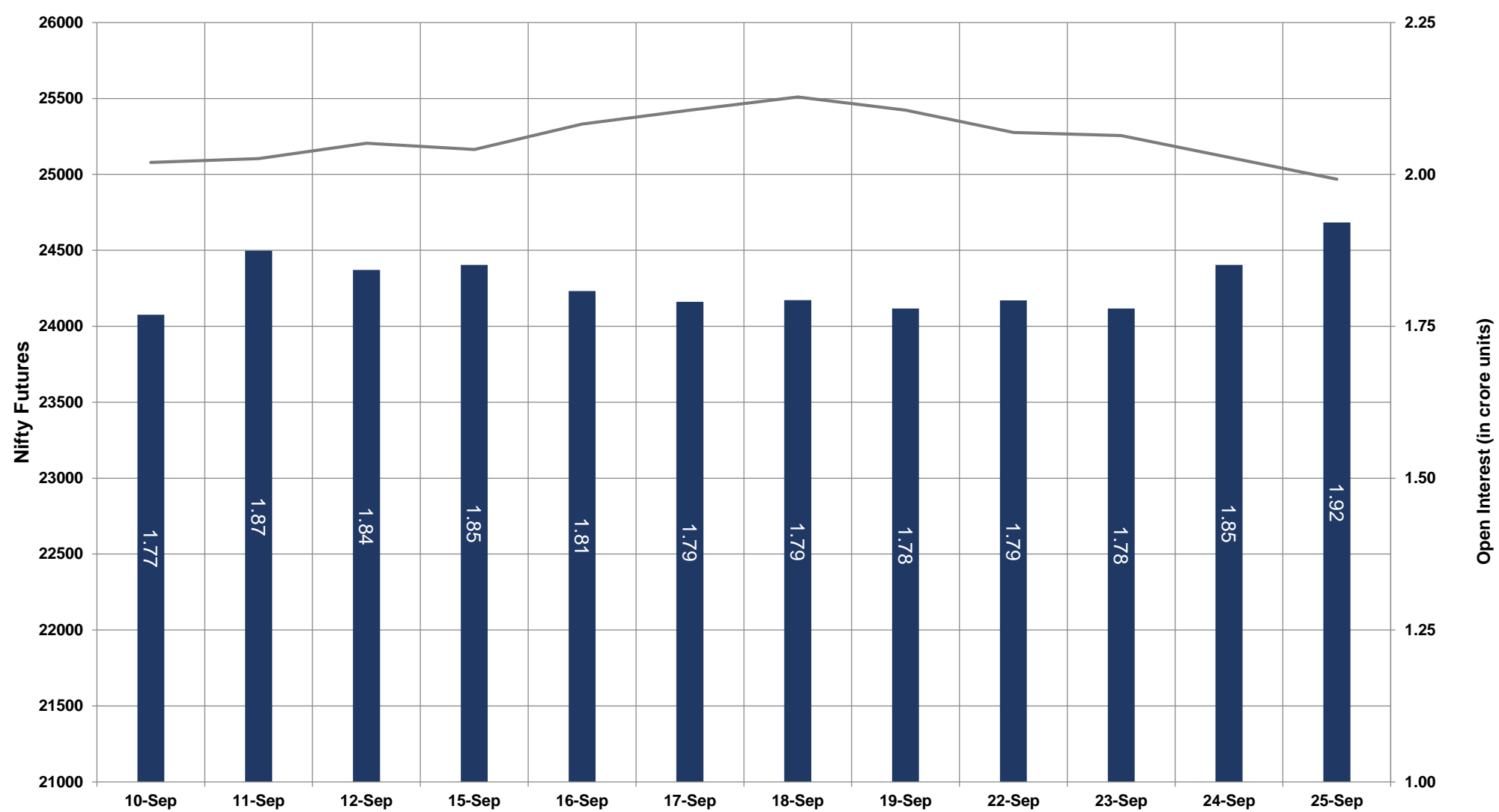


- Nifty Cash = **24890.75 (-0.66%)**
- Resistance levels = **25000** and **25100**
- Support levels = **24750** and **24650**

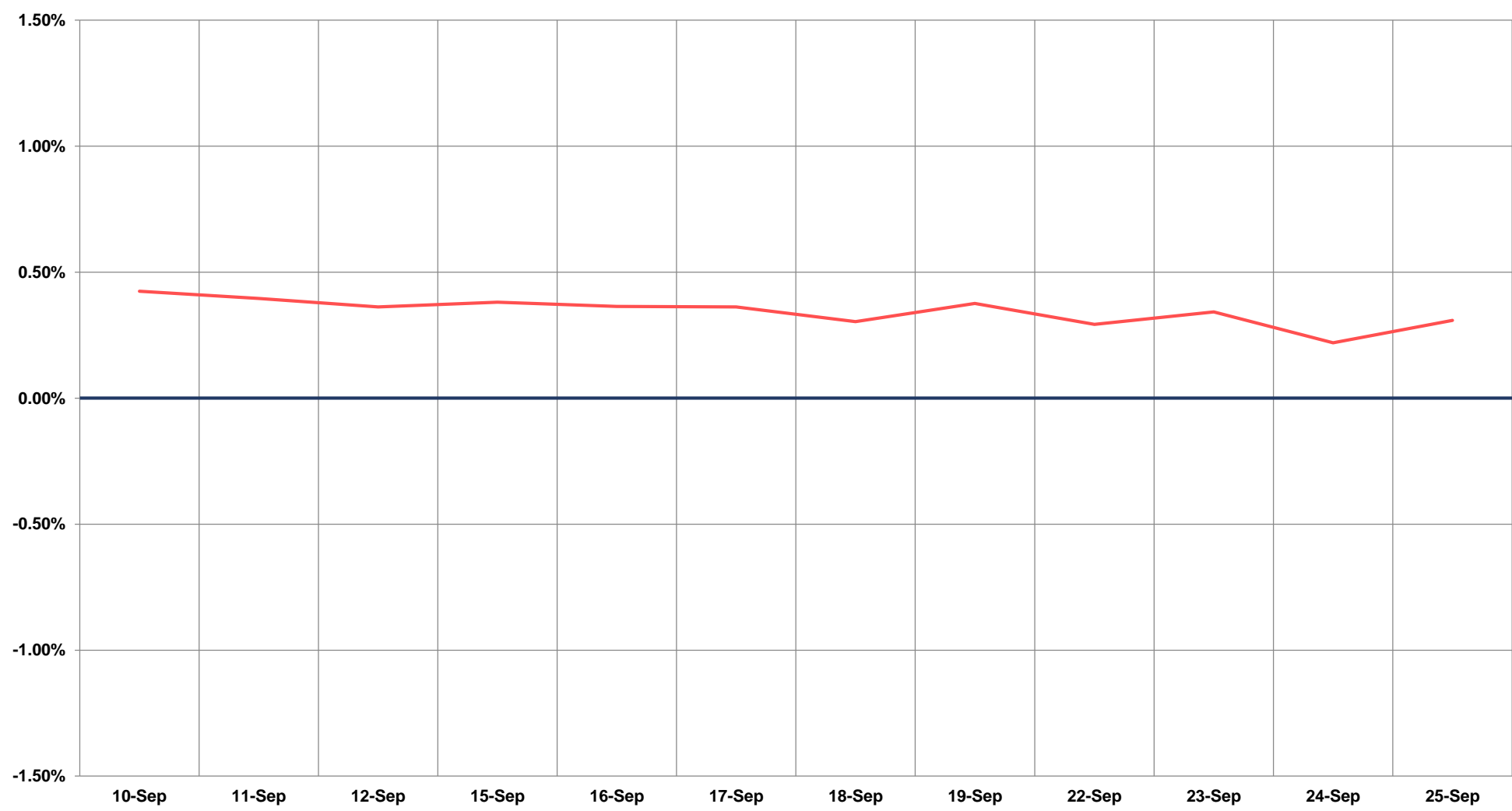
TECHNICAL VIEWS



NIFTY FUTURES



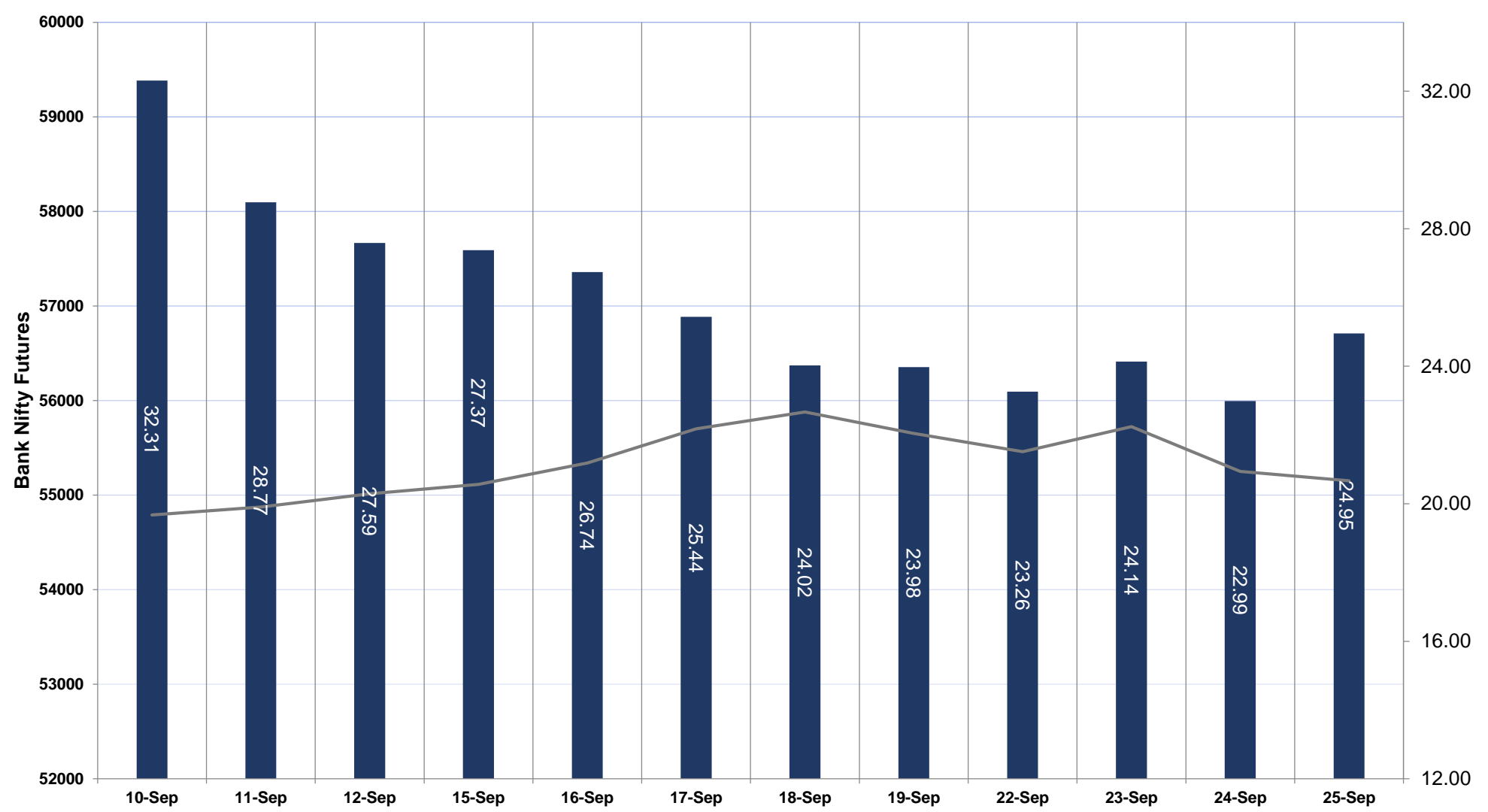
SPREAD: FUTURE & SPOT



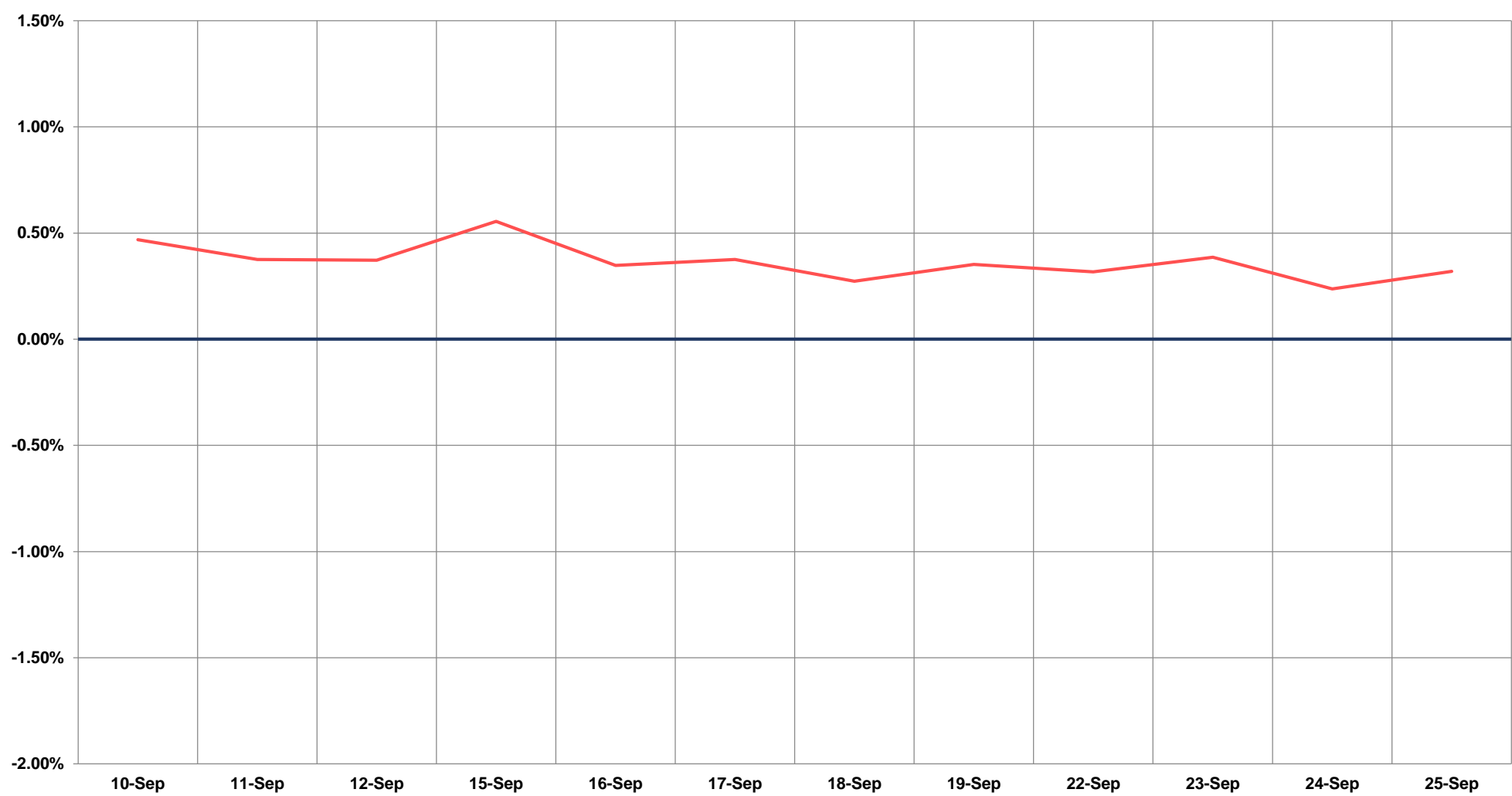
TECHNICAL VIEWS



BANK NIFTY FUTURES

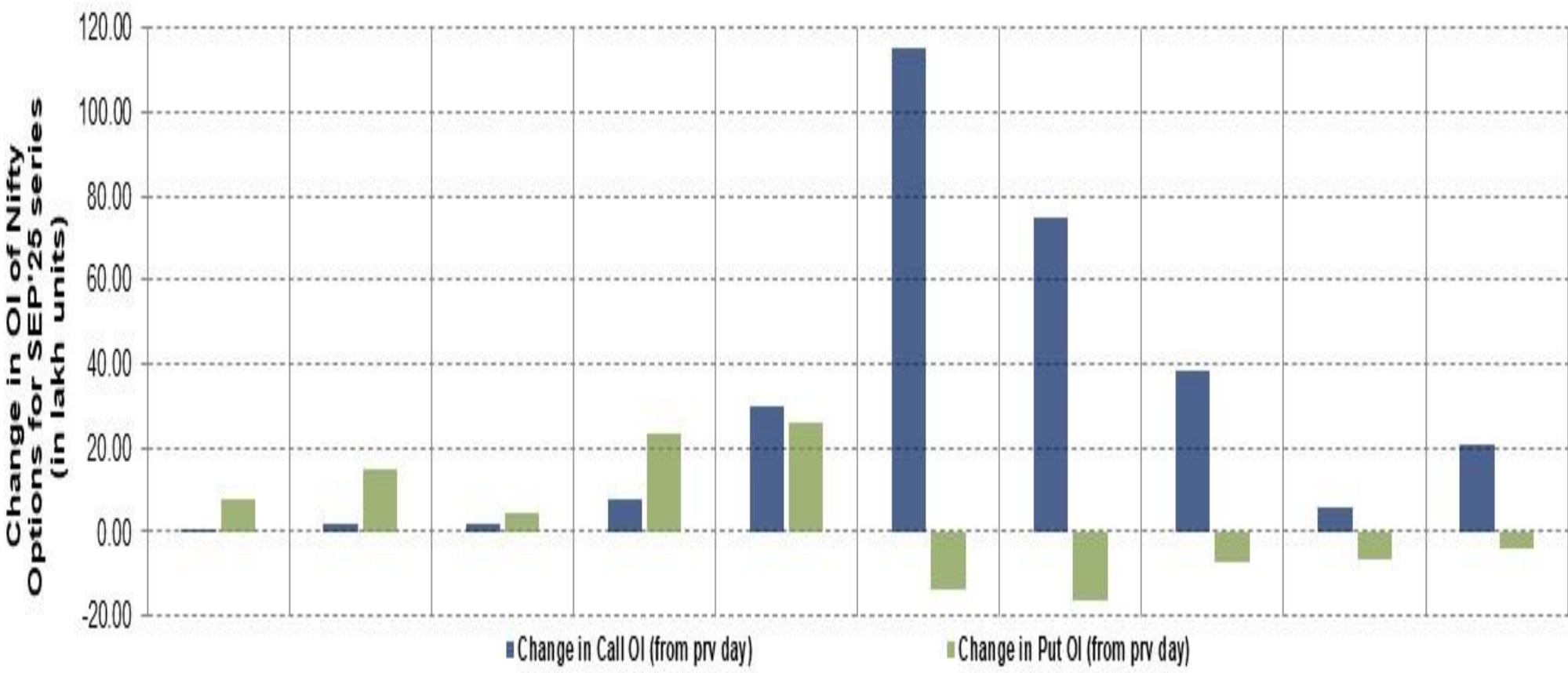
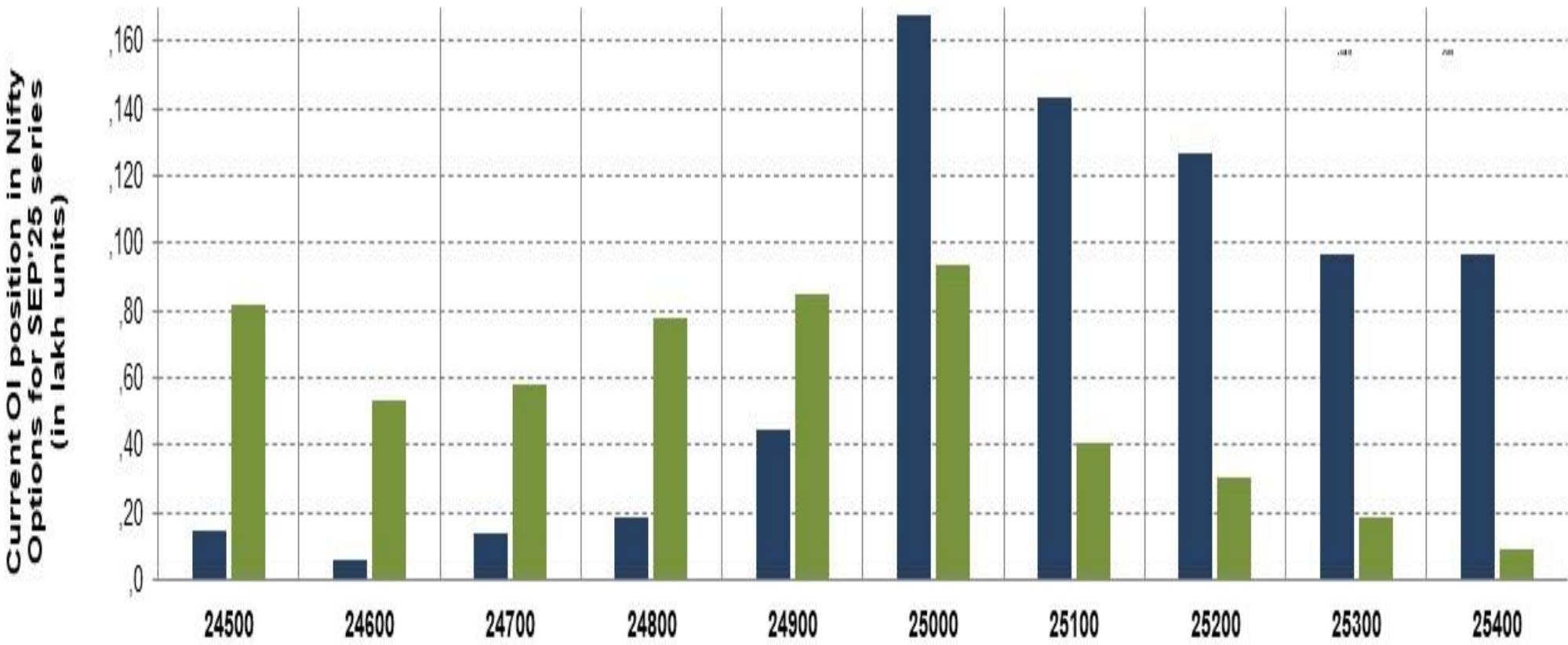


SPREAD: FUTURE & SPOT





NIFTY OPTIONS



- **Most Active Nifty Call** with an addition of 11.5 million in Open Interests is **Strike Price of 25000**
- **Most Active Nifty Put** with an addition of 2.58 millions in Open Interests is **Strike Price of 24900**
- **Maximum Open Interest an outstanding** was 16.7 millions for Calls at **Strike Price of 25000**
- **Maximum Open Interest an outstanding** was 9.3 millions for puts at **Strike Price of 25000**

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