

# TECHNICAL BUILDUP

## OUTLOOK OF THE DAY

- Bearish candle with decrease in volume
- Sell crossover in oscillators
- Lower band of Bollinger exist at 24512
- Crucial moving average of 20/50 SMA are at 24841 and 24343
- 200 SMA trend deciding level exist at 24081

### Indian Equity Market Performance:

Indian equity markets ended Tuesday's session modestly lower as the conflict between Israel and the Islamic republic raged and U.S. President Donald Trump called for the immediate evacuation of Tehran, signaling potential escalation of the conflict.

### Sectoral Front Performance:

On the sectoral front, except IT, all other sectoral indices ended in the red with pharma, metal, oil & gas, auto, realty, PSU Bank down 0.5-2 percent.

### Technical Analysis:

The Nifty 50 ended on a cautious note, forming a bearish candlestick pattern akin to a Bearish Belt Hold, reflecting nervousness across global markets amid rising Iran-Israel tensions. Despite continuing its higher high-higher low structure, the index hovered around key short-term moving averages and managed to close above the 20-day EMA and the midline of the Bollinger Bands – though on muted volumes. Technical indicators remained mixed: the MACD stayed in a negative crossover with a weakening histogram, while the RSI slipped to 53, showing a bearish tilt. With investors awaiting the outcome of the U.S. Fed policy meeting, near-term movement is expected to remain rangebound. A break below 24,850 could trigger a slide toward 24,500, while sustained strength above 25,000 may pave the way for a move to 25,200.

### Option Activity:

On the option front, maximum Put OI is at 24000 followed by 24800 strike, while maximum Call OI is at 25000 followed by 25500 strike. Call writing was seen at 24900 strike, followed by 25000 strike while Put writing was seen at 24000 strike, followed by 24850 strike.

World Indices	LTP	Daily Ch (Pts)	Daily Ch (%)
Dow Jones	42216	-299.29	-0.70
Nasdaq	19521	-180.12	-0.91
S&P 500	5983	-50.39	-0.84
FTSE 100	8834	-41.19	-0.46
DAX	23435	-264.47	-1.12
Hang Seng	23712	-268.30	-1.12
Nikkei	38815	277.76	0.72
Sensex	81583	-212.85	-0.26
Nifty	24853	-93.10	-0.37

Commodity / Forex	LTP	Daily Ch (Pts)	Daily Ch (%)
Gold (\$/Oz)	3,393.70	-13.20	-0.39
Silver (\$/Oz)	37.21	0.05	0.15
Brent Crude (\$/bl)	76.35	-0.10	-0.13
Dollar Index	98.29	-0.10	-0.11
USD/INR	86.38	0.09	0.10
USD/YEN	145.18	-0.06	-0.04
EUR/USD	1.15	0.00	0.10

Support/Resistance levels for Indian Equity Indices					
	S2	S1	CMP	R1	R2
Sensex	80748	81408	81583	82068.1	82728
Nifty	24600	24800	24853	25000	25200
Nifty (Fut)	24615	24815	24868	25015	25215

Pivot Level	
Sensex	81633
Nifty	24883

# ECONOMY NEWS

The government is likely to fix a key omission in the draft Income Tax (I-T) Bill, 2025, which could have widened the scope of alternate minimum tax (AMT) for non-corporate taxpayers such as partnership firms and limited liability partnerships (LLPs) that were earning only long-term capital gains (LTCG), according to a senior official. (BS)

Chief Economic Advisor (CEA) to the Indian government, V Anantha Nageswaran, on Tuesday said the country needs to prioritise areas like manufacturing, education, and employment generation to become a developed nation by 2047 and become indispensable like China. (BS)

The Bihar Cabinet has approved a memorandum of understanding (MoU) between the Airports Authority of India (AAI) and the state government for the development of six small airports under the 'Ude Desh ka Aam Nagrik' (UDAN) scheme. (BS)

To ease passenger woes in short-distance railway travel, the government will manufacture new 100 expanded mainline electric multiple units (MEMU) and 50 Namo Bharat trains, Union Minister for Railways Ashwini Vaishnaw said here on Tuesday. (BS)

India is projected to contribute the most to global oil demand growth by 2030, adding 1 million barrels per day (bpd), according to a report by the International Energy Agency (IEA). (BS)

A sharp rise in global crude oil prices, triggered by intensifying conflict between Israel and Iran, is likely to put pressure on India's current account deficit (CAD) and the rupee, economists have said. But the growth-inflation dynamics are unlikely to be impacted significantly, if petroleum prices remain rangebound. (BS)

The unemployment rate soared to 5.6 per cent in May from 5.1 per cent a month earlier, a rise which experts attributed to a slowdown in farm activities after the harvest season of Rabi crops. (BS)

Systemic credit growth has declined to 8.97 per cent year-on-year (YoY) in the fortnight ended May 30, the lowest in three years. This is owing to lenders becoming more cautious and prioritising asset quality over growth amid higher stress in the microfinance and unsecured segments. (BS)

# CORPORATE NEWS

CG Power has bagged a major order worth Rs 641 crore from Power Grid Corp. The order is for supplying transformer packages, making it the company's largest single order to date.

Bharat Forge has signed a Memorandum of Understanding (MoU) with French company Turgis Gaillard to offer the AAROK UAV in alignment with the Indian Ministry of Defence.

Polycab India has executed a contract worth ₹6,447.54 crore with BSNL to act as the project implementation agency for the BharatNet project in Karnataka, Goa, and Puducherry.

The Competition Commission of India (CCI) has unconditionally approved the acquisition of SML Isuzu by Mahindra & Mahindra, along with the associated open offer to acquire up to 26% stake at a price of Rs 1,554.60 per share.

Vedanta is likely to sell 6.67 crore shares (equivalent to 1.6% equity stake) of Hindustan Zinc via block deals, with a floor price of Rs 452.5 per share, reports CNBC-TV18, quoting sources.

TVS Motor Company announced its foray into the Indonesian electric two-wheeler market with its all-electric scooter iQube.

The Competition Commission of India has approved the proposed acquisition of at least 99.4% stake in Ecom Express by Delhivery, for up to Rs 1,407 crore.

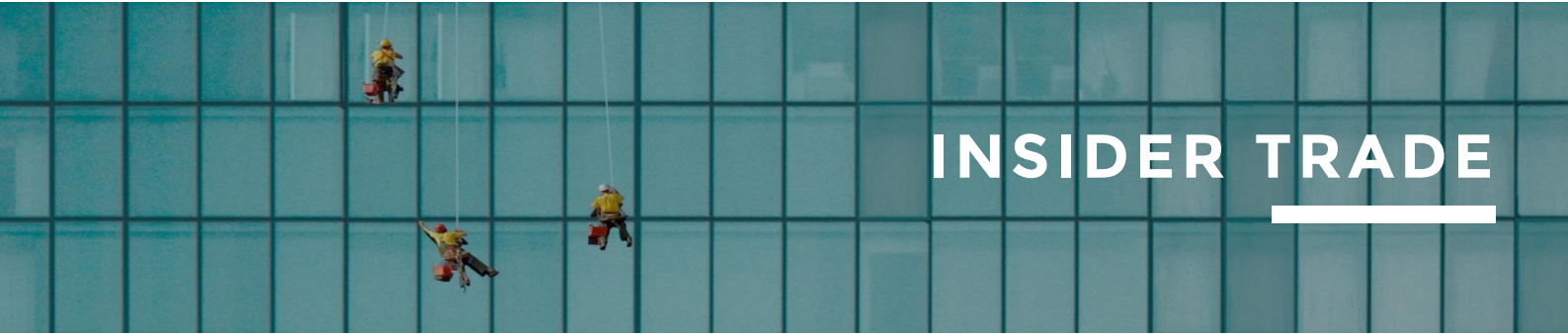
UGRO Capital has proposed to acquire a 100 per cent stake in Profectus Capital for ₹1,400 crore in an all-cash deal, aiming to strengthen its position in the secured MSME lending segment.

EMS became the lowest bidder for an order worth ₹184 crore from UP Jal Nigam.

RailTel Corporation of India has received a Letter of Intent (LOI) from Zoram Electronics Development Corporation (Zenics) for the implementation of the Mizo Fibre Grid Network (MFGN) project, valued at Rs 43.99 crore.

## BULK DEAL

- \*Vishal Mega Mart Limited: Sbi Mutual Fund Buy 94355750 Shares @ Rs. 113.5
- \*Zydus Wellness Limited: Ppfas Mutual Fund Buy 4627111 Shares @ Rs. 1900
- \*Vishal Mega Mart Limited: Hdfc Mutual Fund Buy 75000000 Shares @ Rs. 113.5
- \*Vishal Mega Mart Limited: Sbi Mutual Fund Buy 71500000 Shares @ Rs. 113.5
- \*Vishal Mega Mart Limited: Kotak Mahindra Mutual Fund Buy 50000000 Shares @ Rs. 113.5
- \*Vishal Mega Mart Limited: Kotak Mahindra Mutual Fund Buy 29520295 Shares @ Rs. 113.5
- \*Tvs Supply Chain Sol L: Tvs Motor Company Limited Buy 3950000 Shares @ Rs. 144
- \*Bluspring Enterprises Ltd: India Capital Management Limited A/C India Capital Fund Limited Sell 959992 Shares @ Rs. 70.77
- \*Bluspring Enterprises Ltd: Vanguard Esg International Stock Etf Sell 884440 Shares @ Rs. 69.71
- \*Bluspring Enterprises Ltd: Ishares Core Msci Emerging Markets Etf Sell 787634 Shares @ Rs. 70.35
- \*Kridhan Infra Limited: The Indiaman Fund Mauritius Limited Sell 2371000 Shares @ Rs. 4.6
- \*Kridhan Infra Limited: Aquarius India Opportunities Fund Buy 1500000 Shares @ Rs. 4.6
- \*Pranik Logistics Limited: Pine Oak Global Fund Sell 68800 Shares @ Rs. 79.46
- \*Awfis: Qrg Investments And Holdings Limited Sell 389000 Shares @ Rs. 685.01



**INSIDER TRADE**

**ACQUISITION**

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**DISPOSAL**

**REVOKE**

## NIFTY 500

Top 10 Gainer			Top 10 Loser		
Company	Price (Rs.)	Change (%)	Company	Price (Rs.)	Change (%)
HAPPSTMNDS	658.1	9.4%	SCI	218.9	-7.0%
CRISIL	5675.0	4.9%	JUBLINGREA	728.8	-6.0%
POWERINDIA	18435.0	4.8%	TTML	68.7	-4.3%
NUVAMA	7347.5	4.0%	DBREALTY	222.8	-4.2%
NAVINFLUOR	4665.8	3.4%	ERIS	1773.3	-4.0%
APARINDS	7995.0	3.3%	HINDZINC	492.5	-4.0%
SUPREMEIND	4705.8	3.3%	STARHEALTH	433.5	-3.7%
MAZDOCK	3267.7	3.2%	RTNINDIA	57.6	-3.5%
GRSE	3159.7	3.0%	ASTERDM	565.9	-3.4%
TANLA	676.5	2.9%	HINDCOPPER	253.8	-3.4%

## FII/FPI & DII TRADING ACTIVITY

Category	Buy Value (₹ Cr.)	Sell Value (₹ Cr.)	Net Value (₹ Cr.)
DII	19,427.32	11,220.13	8,207.19
FII	13,581.10	12,098.33	1,482.77

Category	17/06/2025	16/06/2025	13/06/2025	12/06/2025	11/06/2025	10/06/2025
DII	8,207.19	5,780.96	3,041.44	9,393.85	1,584.87	1,113.34
FII	1,482.77	-2,539.42	-1,263.52	-3,831.42	-446.31	2,301.87



# DERIVATIVE REPORT

- Nifty declined by 0.37% with Nifty future added 0.45 lakh shares in open interest and stock
- Stock future added 681.9 Lakh shares in open interest.
- Nifty PCR decreased to 0.95 from 1.41
- Total Nifty Calls added 367.9 lakh shares in open interest.
- Total Nifty Puts shaded 55.5 lakh shares in open interest.
- Maximum open interest (Nifty) in Calls for June series is at 26000 and 24500 put.
- FII's bought net Rs. 1,482.77 Cr (provisional), while DIIs bought net Rs. 8,207.19 Cr in cash market.
- FII bought net Rs. 3915.46 Cr in F&O
- Securities in Ban Period: - ABFRL, BSOFT, CDSL, CHAMBLFERT, HUDCO, IREDA, MANAPPURAM, RBLBANK, TITAGARH

## NIFTY TRACKER

	17.06.2025	16.06.2025	13.06.2025	12.06.2025
Spot	24853.4	24946.5	24718.6	24888.2
% Change in Spot	-0.37%	0.92%	-0.68%	-1.01%
Nifty(FUT) June.	24868.8	24996.2	24727.4	24937.4
Nifty(FUT) June. Vol.	60973	88980	89998	119427
Nifty(FUT) June. - OI	11568075	11748900	11825400	11388075
Nifty(FUT) July.	24985.4	25113.3	24856.8	25068.7
Nifty(FUT) July. Vol.	9469	16672	10331	14512
Nifty(FUT) July. - OI	6266775	6054075	5864700	5735625

## TRADE STATISTICS FOR 17.06.2025

Particulars	Volume (contracts)	Value (₹ Lakhs)	Put Call Ratio
Stock Futures	11,27,536	73,64,757	-
Index Options	5,37,54,998	25,69,434	0.88
Stock Options	72,61,842	6,41,420	0.5
Index Futures	1,05,198	19,10,396	-
NSE F&O Total Turnover	6,22,49,574	1,24,86,007	0.82
NSE Cash Turnover		1,03,10,895	
BSE Cash Turnover		8,23,635	
Total Turnover	-	23620537	-

## FII CORNER (F&O)

FII NET BUYING/SELLING & CHANGE IN OPEN INTEREST (Cr. Rupee)						
Particulars	17/06/2025		16/06/2025		13/06/2025	
	Net Buying /Selling	Change In Open interest	Net Buying /Selling	Change In Open interest	Net Buying /Selling	Change In Open interest
Index Future	394	-114	420	799	-776	608
Index option	8112	-703	-6564	23475	-1429	38149
Stock Future	-1341	-1507	3532	7194	-2699	-1739
Stock option	-3250	4784	-1322	4573	-686	2957
Total	3915	2460	-3934	36040	-5590	39975

## MARKET OPEN INTEREST

Addition/Reduction in Market Open Interest					
Contracts	17/06/2025	16/06/2025	13/06/2025	12/06/2025	11/06/2025
Index Futures	-212	936	1215	255	70
Index Options	-1910	8293	-2024	-4657	79
Stock Futures	91870	170407	-621384	224240	117961
Stock Options	12944	5238	12419	16303	16814
F&O Total	102692	184874	-609774.37	236140.39	134923.84

Increase in OI with Increase in Price (Long Buildup)					
Symbol	Prev OI	Curr OI	Price	Price Chg(%)	OI Chg(%)
ABCAPITAL	5,73,37,200	6,01,58,700	255	2.50%	4.92%
ZOMATO	18,37,62,000	18,61,10,000	214.91	1.48%	1.28%
INFY	5,30,96,000	5,51,54,000	1,638.20	0.87%	3.88%
NTPC	10,95,18,000	11,05,90,500	335.6	0.25%	0.98%
VEDL	7,31,36,550	7,39,89,850	458.95	0.07%	1.17%

Increase in OI with Decrease in Price (Short Buildup)					
Symbol	Prev OI	Curr OI	Price	Price Chg(%)	OI Chg(%)
IDEA	3,99,15,20,000	4,03,79,20,000	6.6	-1.64%	1.16%
YESBANK	81,05,50,000	82,24,84,000	19.91	-1.97%	1.47%
NMDC	22,53,69,000	23,25,51,000	68.65	-2.72%	3.19%
BIOCON	3,02,55,000	3,51,90,000	351.4	-1.75%	16.31%
TATAMOTORS	7,02,63,600	7,48,73,700	672.70	-2.07%	6.56%



## NIFTY OPTION OPEN INTEREST STATISTICS

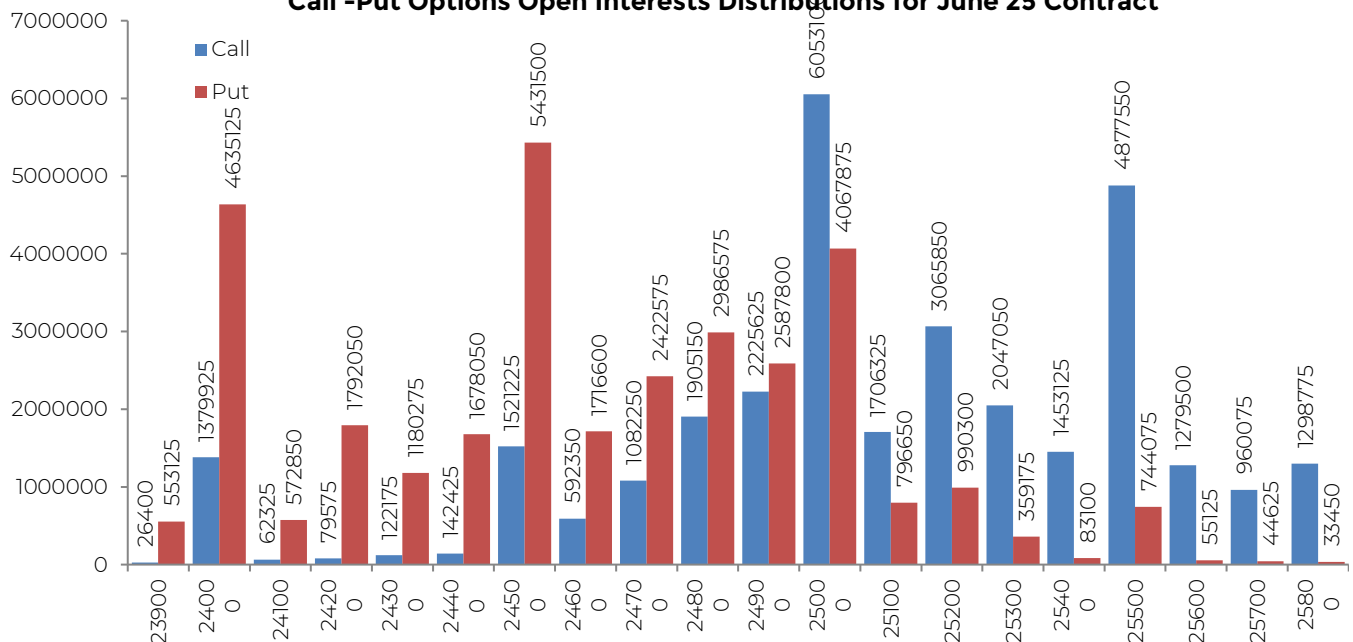
### HIGHEST ADDITIONS

Expiry	Strike	Option Type	Settlement Price	Volume	Open Interest	Change In OI
19-Jun-25	25000	CE	41.35	2173521	9473400	4057275
19-Jun-25	24900	CE	75.6	2686402	6920775	3017250
19-Jun-25	24850	CE	99.35	1474714	3594150	2481375
19-Jun-25	25100	CE	22.3	1251421	6242550	2168100
19-Jun-25	25200	CE	12.15	1318759	7871550	1908150
19-Jun-25	24950	CE	56.5	1200793	3561525	1655850
19-Jun-25	25500	CE	2.75	1071391	9806175	1598100
19-Jun-25	25350	CE	5.15	569052	3308700	1305675
19-Jun-25	25400	CE	4	957312	5113275	1300500
19-Jun-25	25250	CE	8.95	665252	2831850	1123050

### HIGHEST REDUCTIONS

Expiry	Strike	Option Type	Settlement Price	Volume	Open Interest	Change In OI
19-Jun-25	22800	PE	0.9	580857	7821225	-3819675
19-Jun-25	24900	PE	139.35	2362551	3995925	-1708050
19-Jun-25	23500	PE	3	492147	8207925	-1529775
19-Jun-25	24950	PE	170.1	735349	873300	-1372275
19-Jun-25	24700	PE	61.1	1261835	5699775	-1235100
19-Jun-25	23000	PE	1.35	339073	5048625	-1020675
19-Jun-25	25000	PE	205.2	866813	2508975	-1003350
19-Jun-25	24800	PE	92.45	2247287	6219600	-789450
19-Jun-25	24750	PE	74.9	795666	1845975	-700350
19-Jun-25	25200	PE	376.1	61648	715350	-535350

Call -Put Options Open Interests Distributions for June'25 Contract



## STOCK OPTION OPEN INTEREST STATISTICS

### HIGHEST ADDITIONS

Symbol	Expiry	Strike	Option Type	Settl. Price	Volume	Open Interest	Change in OI
YESBANK	31-Jul-25	20	PE	0.7	628	42420400	15052400
YESBANK	26-Jun-25	21	CE	0.1	1538	137566000	12818000
IDEA	31-Jul-25	7	CE	0.35	563	46601700	11650425
IDEA	31-Jul-25	7	PE	0.65	246	46744650	7076025
IDEA	26-Jun-25	7	CE	0.05	866	369760000	6760000
IDEA	31-Jul-25	8	CE	0.15	623	53105925	6218325
YESBANK	31-Jul-25	20	CE	0.85	522	17105000	5380300
ONGC	26-Jun-25	255	CE	2.7	17988	19190325	4527600
YESBANK	31-Jul-25	22	CE	0.25	344	19997300	3452100
ONGC	26-Jun-25	257.5	CE	1.95	7023	7159075	3195500

### HIGHEST REDUCTIONS

Symbol	Expiry	Strike	Option Type	Settl. Price	Volume	Open Int.	Change in OI
YESBANK	26-Jun-25	23	CE	0.05	814	96928000	-5148000
YESBANK	26-Jun-25	19	PE	0.1	1136	22256000	-4264000
IDEA	26-Jun-25	7	PE	0.45	1400	203280000	-3120000
CANBK	26-Jun-25	120	CE	0.2	743	4779000	-2781000
CANBK	26-Jun-25	111	PE	2.9	2151	8673750	-2679750
YESBANK	26-Jun-25	22	PE	2.1	294	26988000	-2392000
YESBANK	26-Jun-25	20	PE	0.45	1171	48984000	-2028000
YESBANK	26-Jun-25	24	CE	0	216	86710000	-1742000
WIPRO	26-Jun-25	260	CE	6	3499	4182000	-1587000
NMDC	26-Jun-25	68	PE	1	667	4765500	-1350000

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