



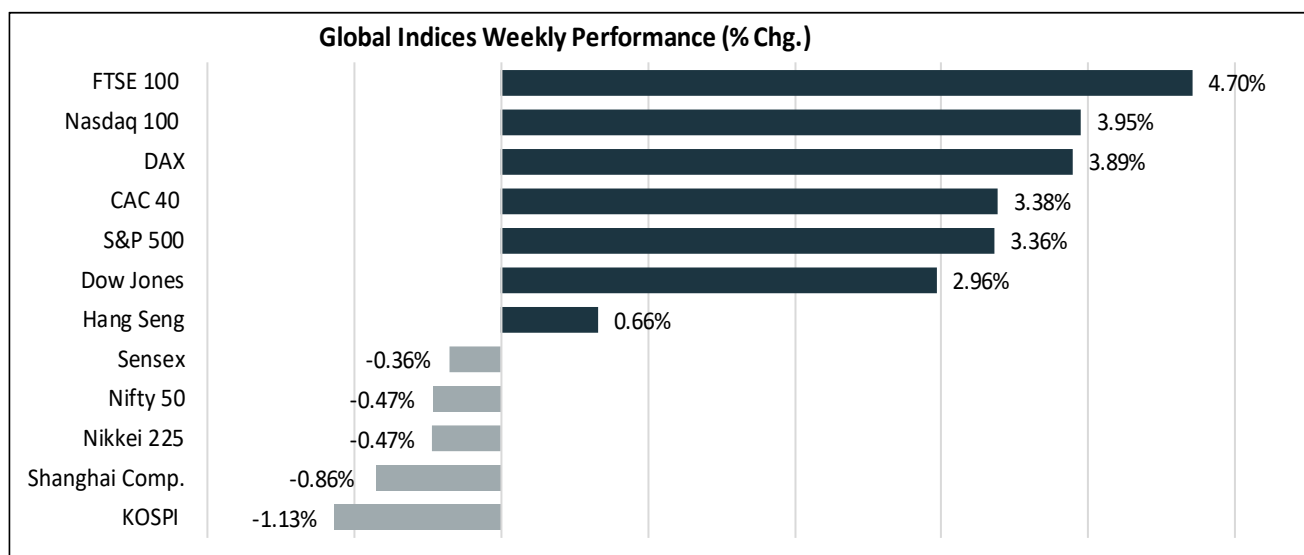
STAT EDGE

**Equity Weekly Research Report**

**4 April 2026**

# Equity Weekly Research Report

## Global Indices Weekly Performance



## Market Summary & Outlook:

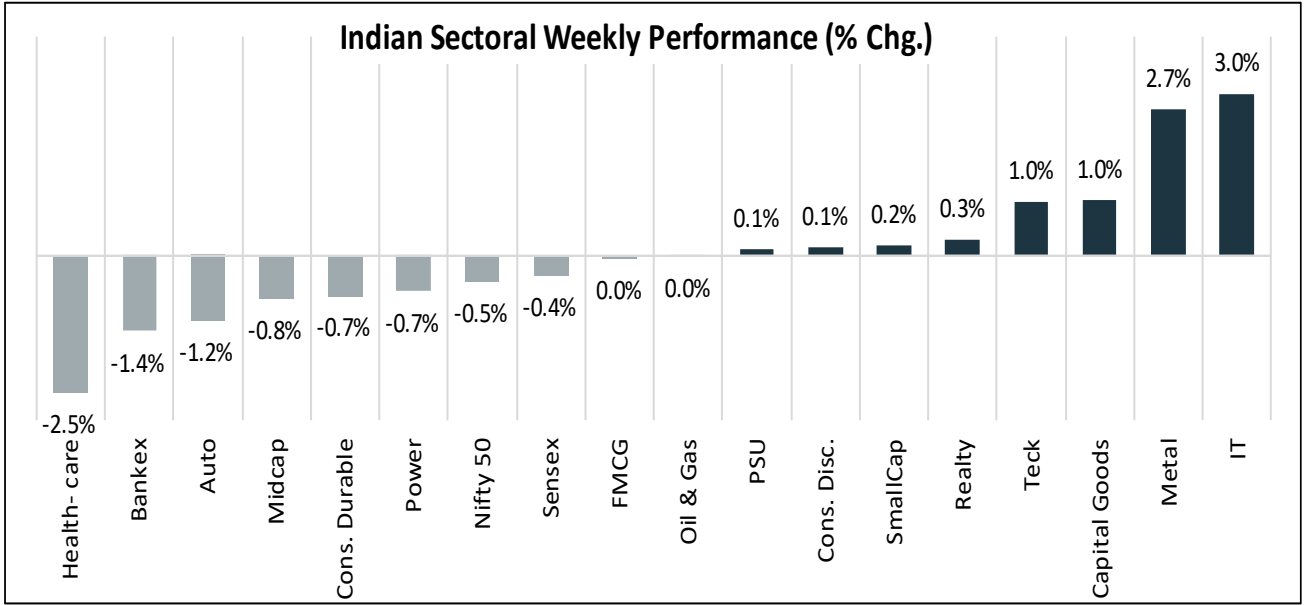
- The sharp rally across major Western equity indices was driven primarily by a rapid shift in geopolitical sentiment, particularly surrounding tensions between the United States and Iran. At the start of the week, markets were gripped by uncertainty, pricing in the risks of prolonged conflict, supply chain disruptions, and a sustained spike in global energy prices. However, this narrative changed abruptly when signals from Washington suggested that a diplomatic off-ramp, or at least a near-term military disengagement, could materialise within weeks. This shift acted as a powerful catalyst for a global “risk-on” move, triggering a broad-based rally in equities.
- The FTSE 100 surged by an impressive 4.70%, outperforming its global peers. This outperformance can be attributed to the index’s sectoral composition. While oil prices remained volatile due to lingering uncertainty in the Middle East, the reduced probability of a prolonged conflict helped alleviate fears of severe supply disruptions.
- Simultaneously, the Nasdaq 100 climbed 3.95%, led by a resurgence in large-cap technology stocks. Earlier concerns about rising inflation had put upward pressure on U.S. Treasury yields, weighing heavily on high-growth, long-duration assets such as tech equities.
- Among the Asian countries, Japan and South Korea remained under pressure, reflecting their acute sensitivity to energy security risks and external shocks. The Nikkei 225 declined by 0.47%, while South Korea’s KOSPI fell more sharply by 1.13%, underperforming several global peers despite improving sentiment elsewhere.
- The Nifty 50 and the BSE Sensex operated for fewer sessions due to market holidays on Mahavir Jayanti (Tuesday) and Good Friday (Friday). The combination of fewer trading sessions, elevated global uncertainty, foreign fund outflows and the risk associated with holding positions over a long weekend led to a defensive posture among Indian investors.

Commodity Performance			
Commodity	03-Apr-26	27-Mar-26	% Change
Gold Spot \$/Oz	4676.76	4494.09	4.06%
Silver Spot \$/Oz	73.02	69.76	4.67%
WTI Crude Oil Fut	111.54	99.64	11.94%
Currency Performance			
Currency	03-Apr-26	27-Mar-26	% Change
Dollar Index Spot	100.03	100.15	-0.12%
Euro Spot	1.1519	1.1509	0.09%
British Pound Spot	1.3202	1.3259	-0.43%
Japanese Yen Spot	159.67	160.31	-0.40%
Chinese Yuan Spot	6.8859	6.92	-0.49%
USDINR	93.10	94.81	-1.80%
EURINR	107.32	109.20	-1.72%
GBPINR	123.19	126.13	-2.33%

Index	Expiry	Weekly High	Weekly Low	Weekly Close	Weekly % Chg.	Open Interest	Chg. In OI	% Chg. In OI	Volume	Chg. In Volume	% Chg. In Volume
Nifty Fut	Apr-26	23035	22277	22767	-0.62%	329683	108982	49.00%	134955	-11442	-8%
Bank Nifty Fut	Apr-26	52399	50172	51818	-1.39%	82407	22381	37.00%	53488	14149	36%
Index	Close	Pivot	Supt.3	Supt.2	Supt.1	Resi.1	Resi.2	Resi.3	20 DMA	50 DMA	RSI
Nifty Fut	22767	22693	21176	21935	22351	23109	23451	24209	23601	24788	37.70
Bank Nifty Fut	51818	51463	47010	49236	50527	52754	53690	55917	55002	58208	35.90

# Equity Weekly Research Report

## Indian Sectoral Weekly Performance (% Chg.)

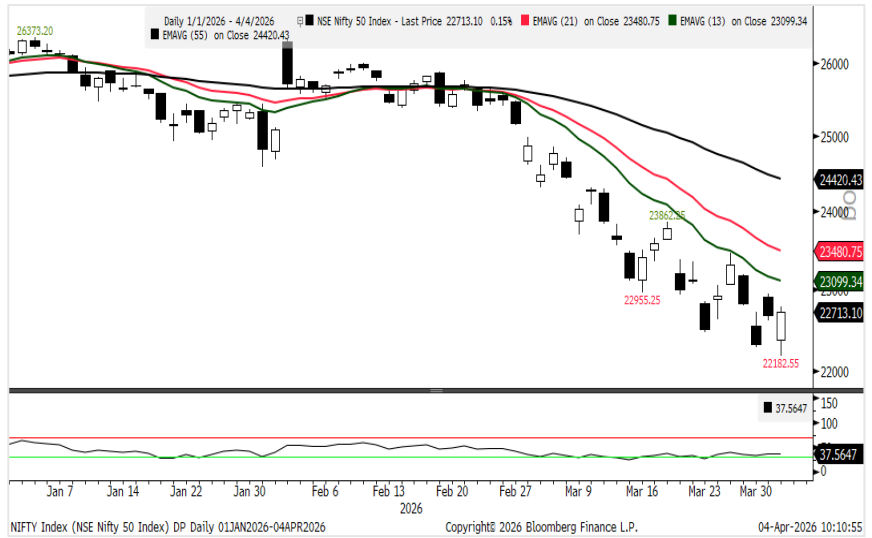


### Technical Outlooks:

#### Spot Nifty50 Index View:

- The Nifty50 Index is trading well below the major moving averages.
- The RSI is placed near an oversold zone, indicating weak momentum.
- The trend remains bearish amid weak chart structure.

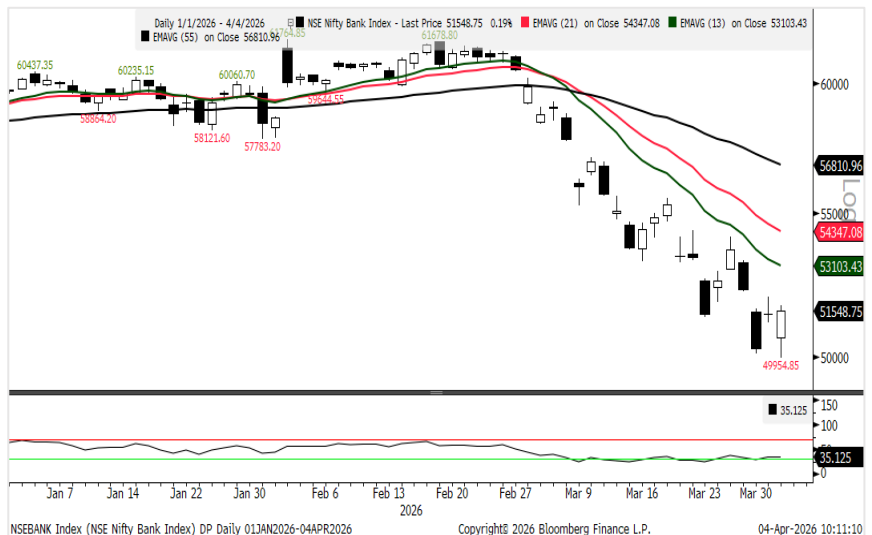
- **Nifty50 Index: Negative**
- **Supt. 22100 Resi. 23500**



#### Spot Bank Nifty Index View:

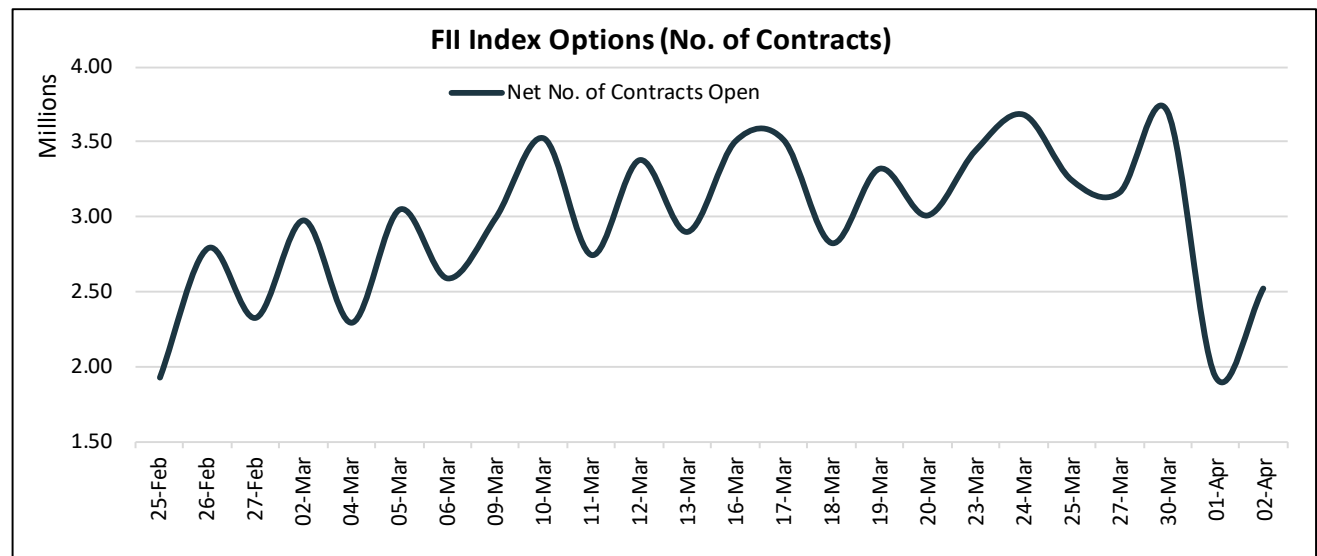
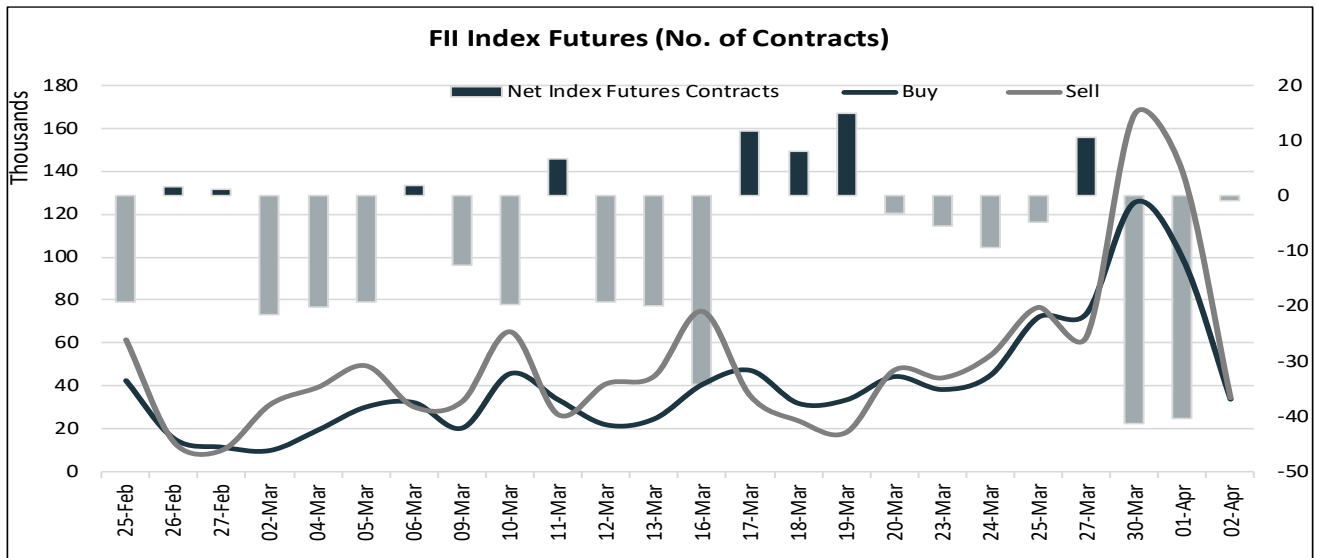
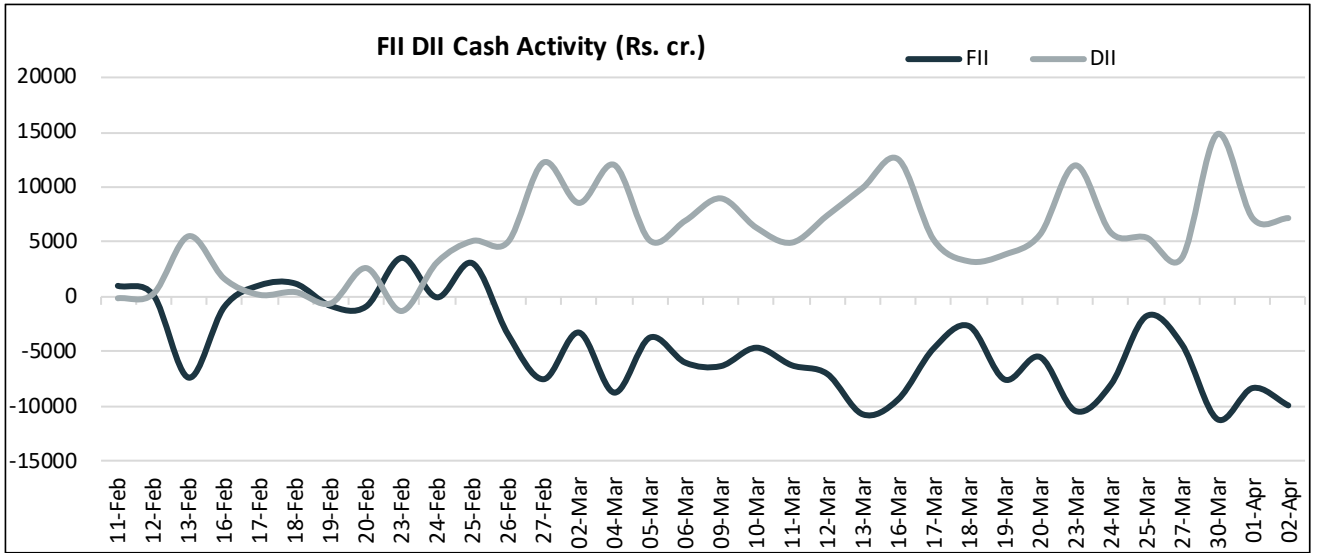
- The Nifty Bank Index formed a bullish candle post the doji candle.
- Daily RSI is placed in an oversold zone, exhibiting negative momentum.
- It has formed a bearish lower highs and lows formation on the daily chart.

- **Bank Nifty: Negative**
- **Supt. 50000 Resi. 54300**



# Equity Weekly Research Report

## Institutional Activities



# Equity Weekly Research Report

## Nifty50 Index Near Month Option Distribution Analysis:

The highest open position has been seen on 23000 Strikes

### OI Positions:

Highest: 23000 strikes

90.73 lakh contracts

### Major Changes in OI:

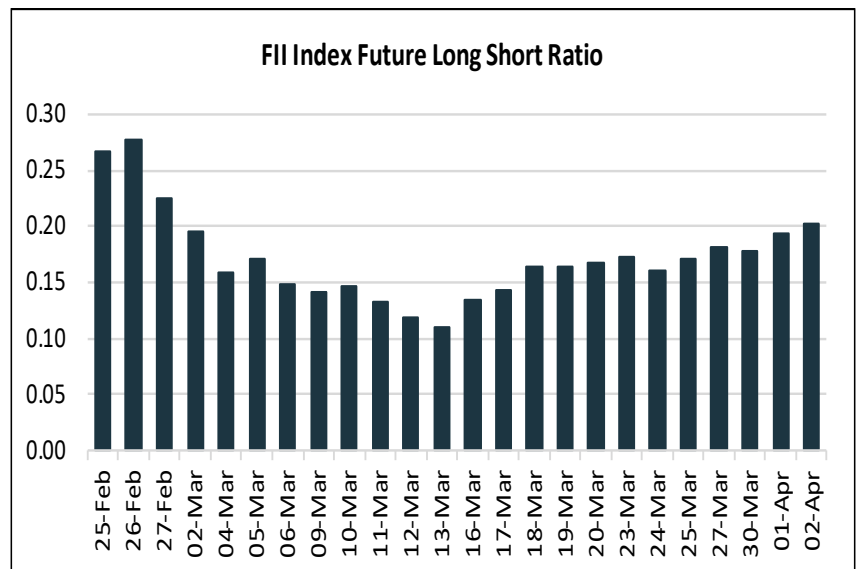
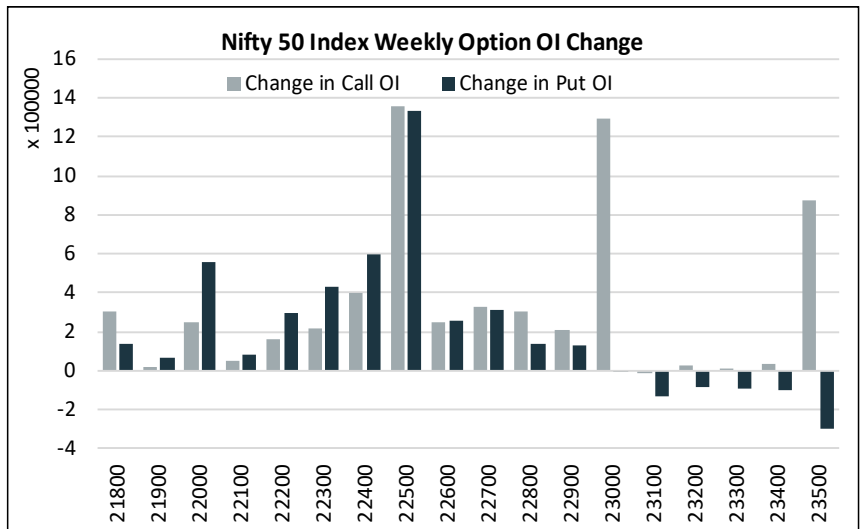
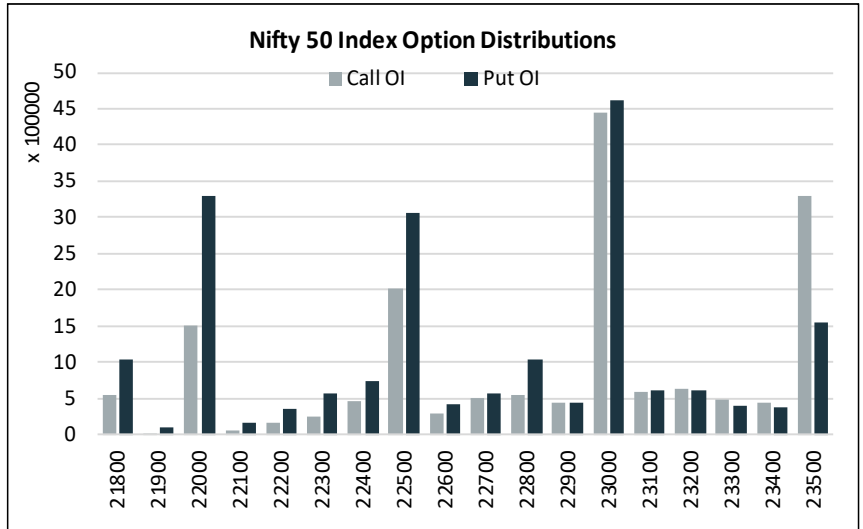
Addition: 22500 CE & PE

Reduction: 27500 CE & 23500 PE

High Activity by Open Interest:

Addition: 22500 strike

Looking at the above observations, the Nifty50 Index could find support at 22000 and resistance at 23500



FII Index's future long-to-short ratio steady at 0.18.

# Equity Weekly Research Report

## Economic Calendar

Date	Time	Country	Event	Period	Survey	Prior
06-Apr	10:30	India	HSBC India PMI Composite	Mar F	--	56.5
	10:30	India	HSBC India PMI Services	Mar F	--	57.2
	19:30	US	ISM Services Index	Mar	54.9	56.1
07-Apr	13:30	EC	S&P Global Eurozone Services PMI	Mar F	50.1	50.1
	14:00	EC	Sentix Investor Confidence	Apr	-7.7	-3.1
	14:00	UK	S&P Global UK Services PMI	Mar F	51.2	51.2
	17:45	US	ADP Weekly Employment Change	21-Mar	--	10.000k
	18:00	US	Durable Goods Orders	Feb P	-1.00%	0.00%
08-Apr	05:20	Japan	BoP Current Account Balance	Feb	¥3456.7b	¥941.6b
	10:00	India	RBI Repurchase Rate	08-Apr	5.25%	5.25%
	14:00	UK	S&P Global UK Construction PMI	Mar	43.5	44.5
	14:30	EC	Retail Sales YoY	Feb	1.60%	2.00%
	16:30	US	MBA Mortgage Applications	03-Apr	--	-10.40%
	23:30	US	FOMC Meeting Minutes	18-Mar	--	--
09-Apr	18:00	US	Personal Income	Feb	0.30%	0.40%
	18:00	US	Personal Spending	Feb	0.50%	0.40%
	18:00	US	PCE Price Index YoY	Feb	2.80%	2.80%
	18:00	US	Core PCE Price Index YoY	Feb	2.90%	3.10%
	18:00	US	Initial Jobless Claims	04-Apr	210k	202k
	18:00	US	Continuing Claims	28-Mar	--	1841k
	18:00	US	GDP Annualized QoQ	4Q T	0.70%	0.70%
	18:00	US	Core PCE Price Index QoQ	4Q T	--	2.70%
19:30	US	Wholesale Inventories MoM	Feb F	--	-0.50%	
10-Apr	07:00	China	CPI YoY	Mar	1.20%	1.30%
	18:00	US	CPI YoY	Mar	3.40%	2.40%
	18:00	US	Core CPI YoY	Mar	2.70%	2.50%
	19:30	US	Factory Orders	Feb	-0.20%	0.10%
	19:30	US	U. of Mich. Sentiment	Apr P	52	53.3
	19:30	US	Durable Goods Orders	Feb F	--	0.00%
	23:30	US	Federal Budget Balance	Mar	--	-\$160.5b

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