



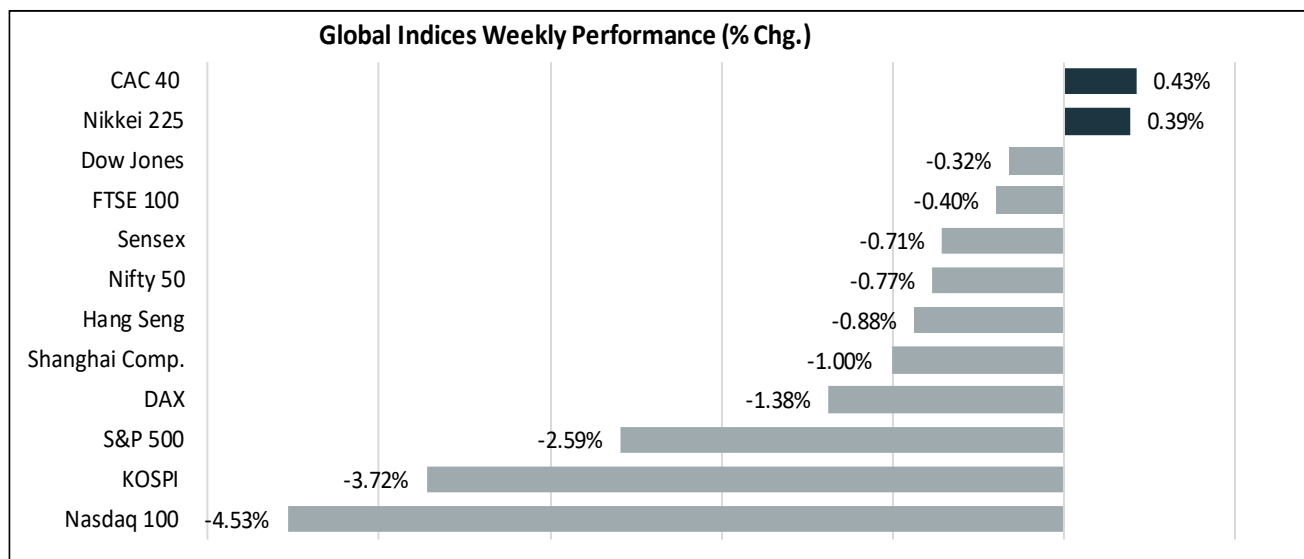
STAT EDGE

Equity Weekly Research Report

6 June 2026

Equity Weekly Research Report

Global Indices Weekly Performance



Market Summary & Outlook:

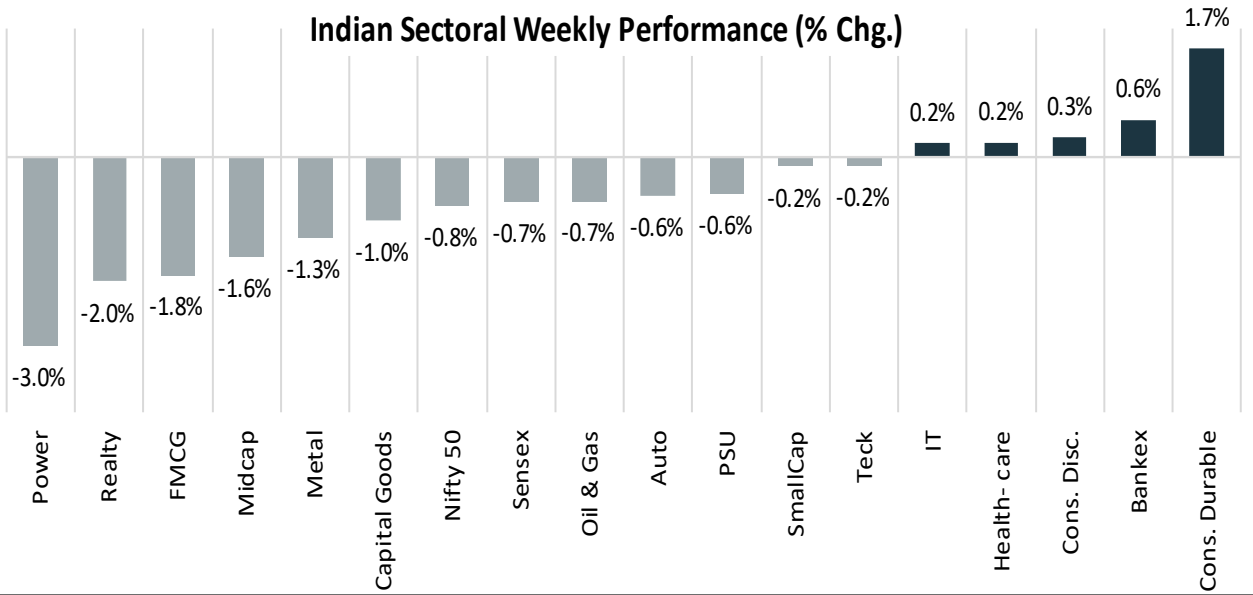
- Global equity markets exhibited a highly fragmented performance this week, characterised by a sharp rotation away from tech-heavy indices toward select European and Asian markets. Investor sentiment was starkly divided, with a pronounced sell-off in growth-oriented sectors dragging down major Western benchmarks, while defensive positioning and localised tailwinds provided a boost to a handful of global peers.
- The Nasdaq 100 anchored the bottom of the global performance chart, plunging a steep -4.53%. This significant pullback was mirrored in Asian tech hubs, most notably by South Korea's KOSPI, which lagged severely with a -3.72% decline. The broad-based retreat in these indices reflects a deepening vulnerability to high valuation risk, a cooling of recent AI-driven momentum, and persistent concerns over restrictive global interest rate trajectories affecting tech-heavy capital structures.
- Conversely, the French CAC 40 and Japan's Nikkei 225 managed to defy the broader global gloom, emerging as the week's sole positive performers. The CAC 40 led the global pack with a modest gain of 0.43%, closely followed by the Nikkei 225 at 0.39%. The resilience in these markets underscores a tactical shift toward value stocks, luxury defensives in Europe, and a weaker Yen environment supporting corporate earnings expectations for export-oriented Japanese conglomerates.
- Turning to the domestic front, the Indian equity market remained under pressure, with the Nifty 50 and Sensex compounding the week's negative trend by sliding -0.77% and -0.71%, respectively. Foreign Institutional Investors (FIIs) continued their relentless selling streak, looking past the Reserve Bank of India's (RBI) recent decision to maintain an interest rate pause, as well as newly introduced regulatory measures specifically designed to attract foreign fund inflows into the domestic debt market. On a sectoral level, performance was highly polarised: the Consumer Durables sector emerged as the top gainer, buoyed by resilient demand and stable urban consumption, whereas the Power sector finished the week as the primary laggard, weighed down by heavy profit-taking and structural supply-chain bottlenecks.

Commodity Performance			
Commodity	05-Jun-26	29-May-26	% Change
Gold Spot \$/Oz	4328.45	4540.26	-4.67%
Silver Spot \$/Oz	67.83	75.30	-9.91%
WTI Crude Oil Fut	90.54	87.36	3.64%
Currency Performance			
Currency	05-Jun-26	29-May-26	% Change
Dollar Index Spot	100.07	98.94	1.14%
Euro Spot	1.1522	1.1659	-1.18%
British Pound Spot	1.3342	1.3456	-0.85%
Japanese Yen Spot	160.29	159.27	0.64%
Chinese Yuan Spot	6.7907	6.7635	0.40%
USDINR	94.94	95.00	-0.06%
EURINR	110.50	110.60	-0.09%
GBPINR	127.84	127.47	0.28%

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	Jun-26	23779	23212	23452	-1.25%	299874	35173	13.00%	77789	-56460	-42%
Bank Nifty Fut	Jun-26	55166	53288	54782	0.04%	83532	-912	-1.00%	60395	19477	48%
Index	Close	Pivot	Supt.3	Supt.2	Supt.1	Resi.1	Resi.2	Resi.3	10 DMA	20 DMA	RSI
Nifty Fut	23452	23481	22347	22914	23183	23750	24048	24615	23696	23733	42.20
Bank Nifty Fut	54782	54412	50655	52533	53657	55536	56290	58169	54338	54658	50.50

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Indian Sectoral Weekly Performance (% Chg.)



Technical Outlooks:

Spot Nifty50 Index View:

- The Nifty50 Index closed below the 13 DEMA.
- The RSI is placed below 50, indicating negative momentum.
- It has been trading in a bearish chart pattern of lower highs and lows.
- **Nifty50 Index: Bearish**
- **Supt. 23100 Resi. 23800**



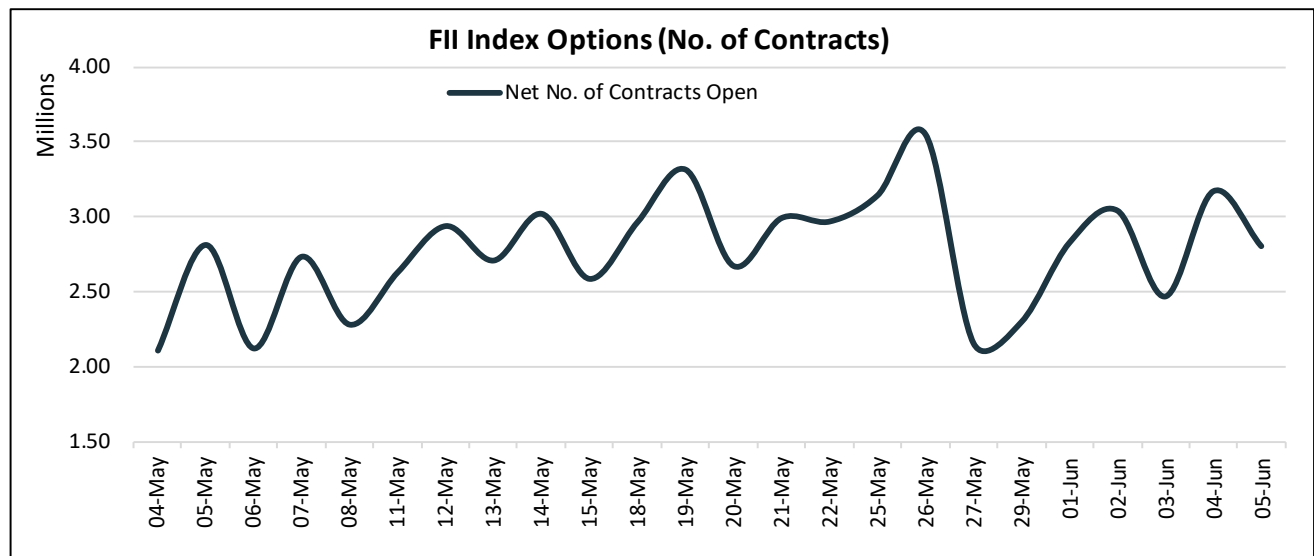
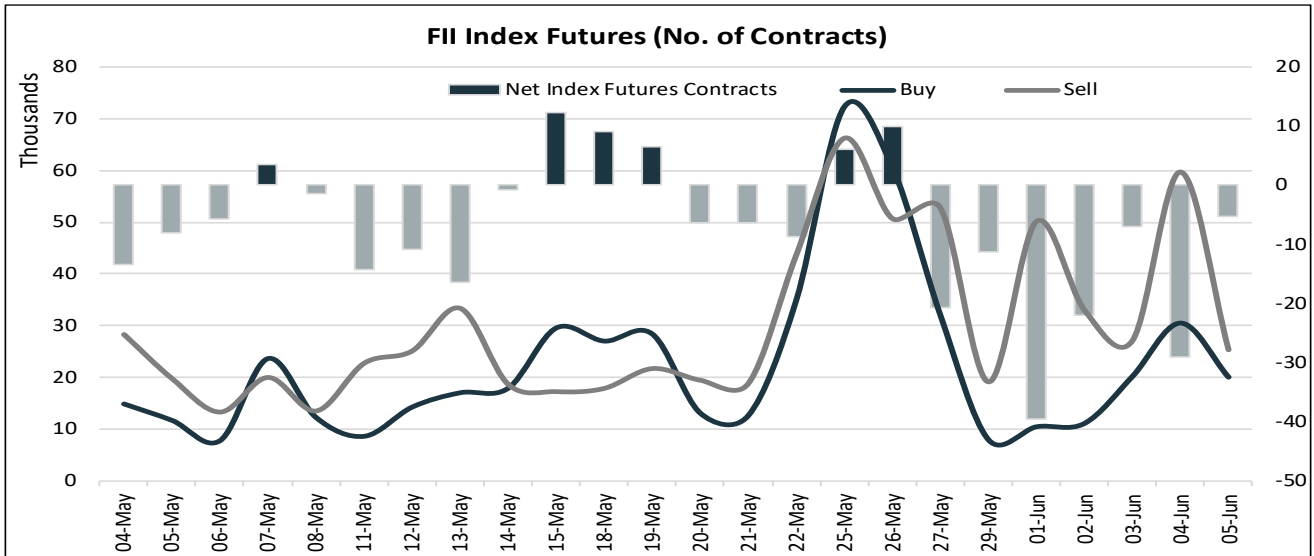
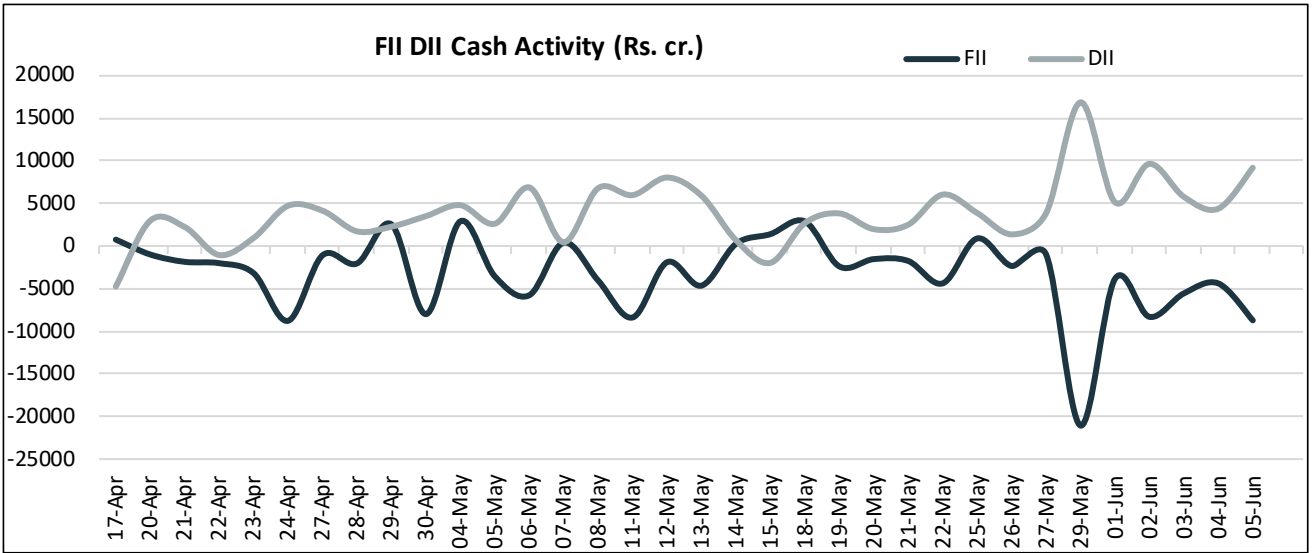
Spot Bank Nifty Index View:

- The Nifty Bank resisted at the 55 DEMA and retraced.
- Daily RSI is placed above 50, indicating positive momentum.
- Trading above 55540 will negate the bearish sequence of lower highs and lows.
- **Bank Nifty: Consolidation**
- **Supt. 53050 Resi. 55550**



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Institutional Activities



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Nifty50 Index Near Month Option Distribution Analysis:

The highest open position has been seen on 25000 Strikes

OI Positions:

Highest: 25000 strikes

137.3 lakh contracts

Major Changes in OI:

Addition: 23500 CE & 23300 PE

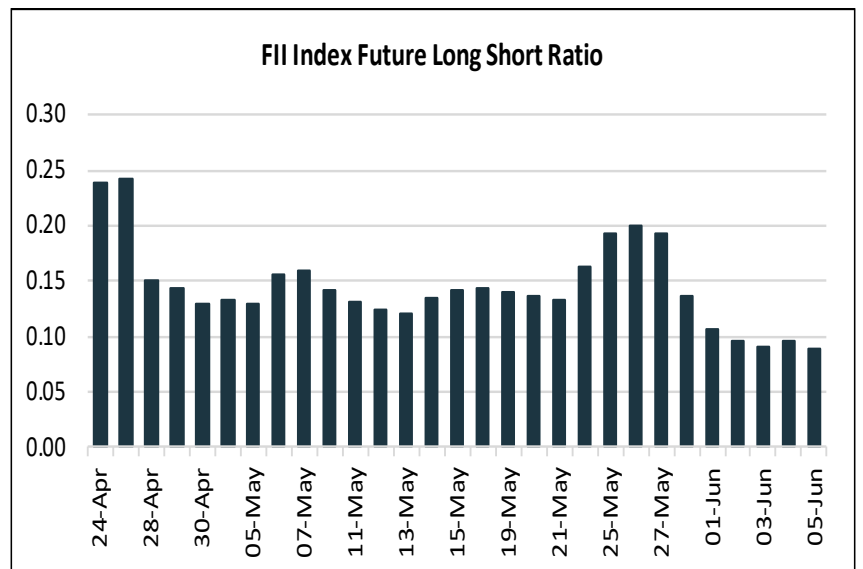
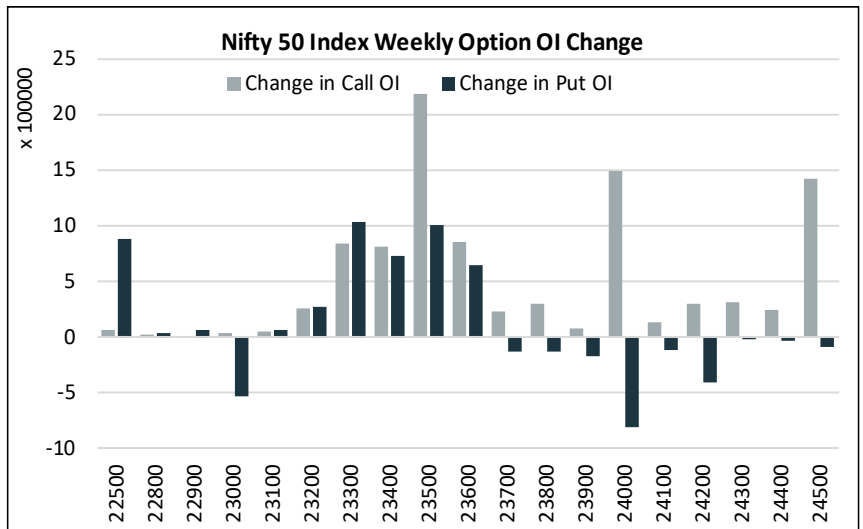
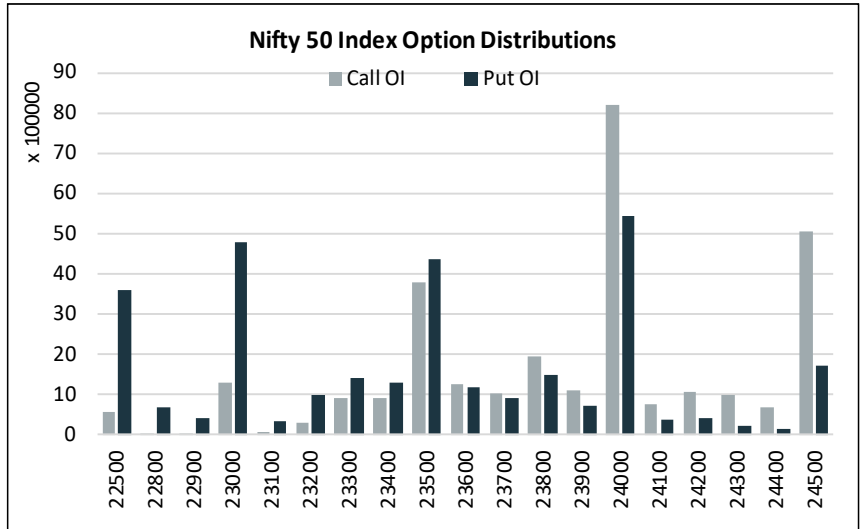
Reduction: 24900 CE & 24000 PE

High Activity by Open Interest:

Addition: 23500 strike

Looking at the above observations, the Nifty50 Index could find support at 22500 and resistance at 24000

FII Index's future long-to-short ratio pegged at 0.09



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Economic Calendar						
Date	Time	Country	Event	Period	Survey	Prior
08-Jun	05:20:00	Japan	GDP SA QoQ	1Q F	0.30%	0.50%
	05:20:00	Japan	BoP Current Account Balance	Apr	¥3119.0b	¥4681.5b
	14:00:00	EC	Sentix Investor Confidence	Jun	-14	-16.4
09-Jun	15:30:00	US	NFIB Small Business Optimism	May	96	95.9
	17:45:00	US	ADP Weekly Employment Change	23-May	--	35.750k
	18:00:00	US	Trade Balance	Apr	-\$56.5b	-\$60.3b
	19:30:00	US	Existing Home Sales	May	4.06m	4.02m
	19:30:00	US	Wholesale Inventories MoM	Apr F	0.60%	0.50%
		China	Trade Balance	May	\$92.60b	\$84.82b
10-Jun	07:00:00	China	PPI YoY	May	3.80%	2.80%
	07:00:00	China	CPI YoY	May	1.30%	1.20%
	16:30:00	US	MBA Mortgage Applications	05-Jun	--	-2.50%
	18:00:00	US	CPI YoY	May	4.20%	3.80%
	18:00:00	US	Core CPI YoY	May	2.90%	2.80%
	23:30:00	US	Federal Budget Balance	May	-\$275.0b	\$215.0b
11-Jun	17:45:00	EC	ECB Deposit Facility Rate	11-Jun	2.25%	2.00%
	17:45:00	EC	ECB Main Refinancing Rate	11-Jun	2.40%	2.15%
	17:45:00	EC	ECB Marginal Lending Facility	11-Jun	2.65%	2.40%
	18:00:00	US	Initial Jobless Claims	06-Jun	219k	225k
	18:00:00	US	Continuing Claims	30-May	1785k	1777k
12-Jun	10:00:00	Japan	Industrial Production YoY	Apr F	--	2.30%
	11:30:00	UK	Monthly GDP (MoM)	Apr	-0.10%	0.30%
	11:30:00	UK	Industrial Production YoY	Apr	-0.10%	0.00%
	11:30:00	UK	Manufacturing Production YoY	Apr	0.40%	1.20%
	11:30:00	UK	Index of Services MoM	Apr	-0.10%	0.30%
	11:30:00	UK	Construction Output YoY	Apr	-1.70%	-0.30%
	11:30:00	UK	Trade Balance GBP/Mn	Apr	-£5700m	-£9658m
	16:00:00	India	CPI YoY	May	4.00%	3.48%
19:30:00	US	U. of Mich. Sentiment	Jun P	46	44.8	

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