



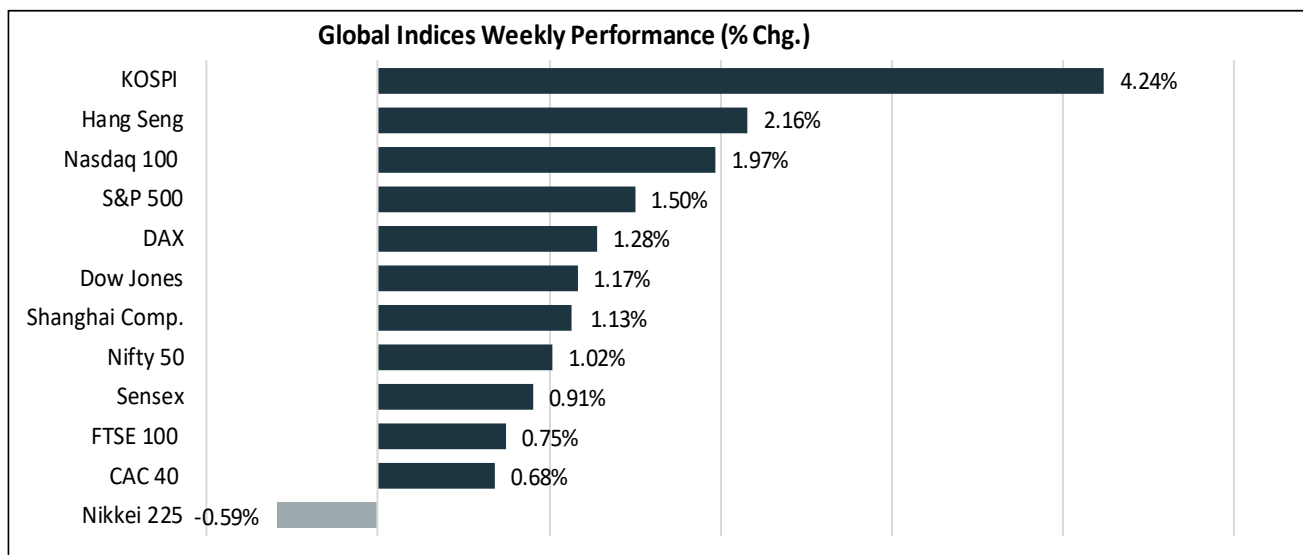
STAT EDGE

## **Equity Weekly Research Report**

**7 June 2025**

# Equity Weekly Research Report

## Global Indices Weekly Performance



## Market Summary & Outlook:

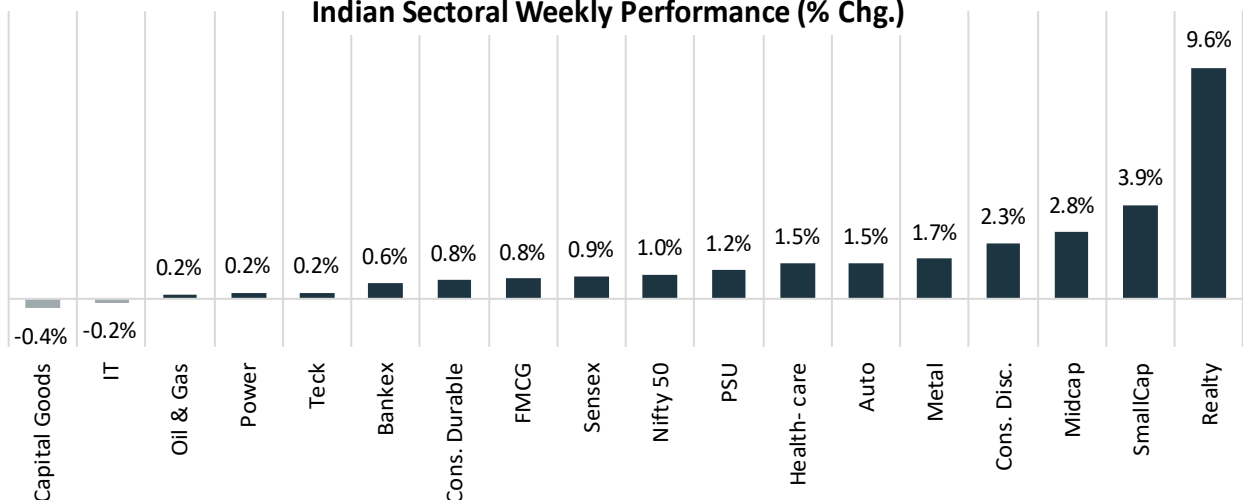
- The election of President Lee Jae-myung has ushered in a period of political stability, positively impacting the KOSPI market sentiment. The KOSPI index showed the strongest performance, gaining 4.24%. Other notable positive performers included the Hang Seng (2.16%), Nasdaq 100 (1.97%), and S&P 500 (1.50%).
- In contrast, the Nikkei 225 was the only index to experience a decline, falling by 0.59% over the week. Japanese equities retreated last week, weighed down by their heaviest weekly capital outflows since July 2007. Investors pulled approximately \$7.49 billion from the market, signalling a sharp shift in sentiment amid mounting caution over valuations and broader global uncertainties.
- The Reserve Bank of India (RBI) took a decisive step to boost economic momentum, cutting the benchmark interest rate by 50 basis points, its steepest reduction in five years, along with a 100bps cut to the cash reserve ratio (CRR). These liquidity-enhancing measures are designed to lower borrowing costs and support credit growth, a move widely welcomed by the markets. Investor sentiment responded positively, with the BSE Sensex climbing 747 points (0.9%) to close at 82,189, and the Nifty 50 rising over 1%, delivering their best single-day performance in two weeks.
- Among the key sectors, Realty distinguished itself as the top performer, achieving an impressive weekly gain of 9.6%. This robust performance was primarily driven by the Reserve Bank of India's recent rate cut, which significantly enhanced affordability and piqued investor interest, alongside sustained institutional inflows into the sector. Conversely, the Capital Goods and Information Technology (IT) sectors underperformed, declining by 0.4% and 0.2% respectively. These were the only sectors to conclude the week in negative territory, primarily constrained by concerns over elevated valuations, softening demand, and persistent uncertainty surrounding global tariff policies.

Commodity Performance			
Commodity	06-Jun-25	30-May-25	% Change
Gold Spot \$/Oz	3310.42	3289.25	0.64%
Silver Spot \$/Oz	35.98	32.98	9.08%
WTI Crude Oil Mar25	64.58	60.79	6.23%
Currency Performance			
Currency	06-Jun-25	30-May-25	% Change
Dollar Index Spot	99.19	99.33	-0.14%
Euro Spot	1.1397	1.1347	0.44%
British Pound Spot	1.3528	1.3459	0.51%
Japanese Yen Spot	144.85	144.02	0.58%
Chinese Yuan Spot	7.1886	7.2051	-0.23%
USDINR	85.64	85.58	0.06%
EURINR	97.7984	96.9375	0.89%
GBPINR	115.90	115.28	0.54%

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	26-Jun-25	25139	24610	25096	0.91%	162408	-11192	-6.00%	109889	40349	58%
Bank Nifty Fut	26-Jun-25	56833	55700	56770	1.24%	69832	8410	14.00%	114560	70249	159%
Index	Close	Pivot	Supt.3	Supt.2	Supt.1	Resi.1	Resi.2	Resi.3	20 DMA	50 DMA	RSI
Nifty Fut	25096	24948	23890	24419	24758	25287	25477	26006	24861	24197	61.30
Bank Nifty Fut	56770	56434	54169	55302	56036	57169	57567	58700	55598	54167	68.40

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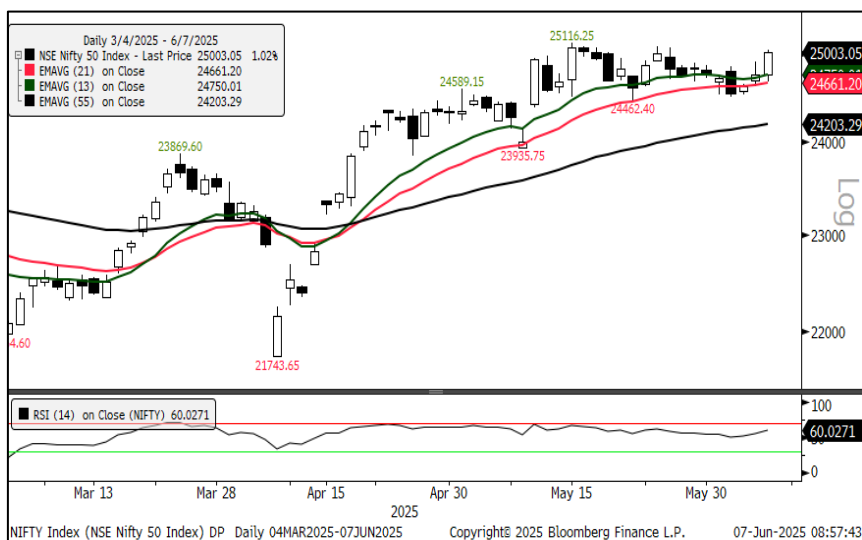
## Indian Sectoral Weekly Performance (% Chg.)



## Technical Outlooks:

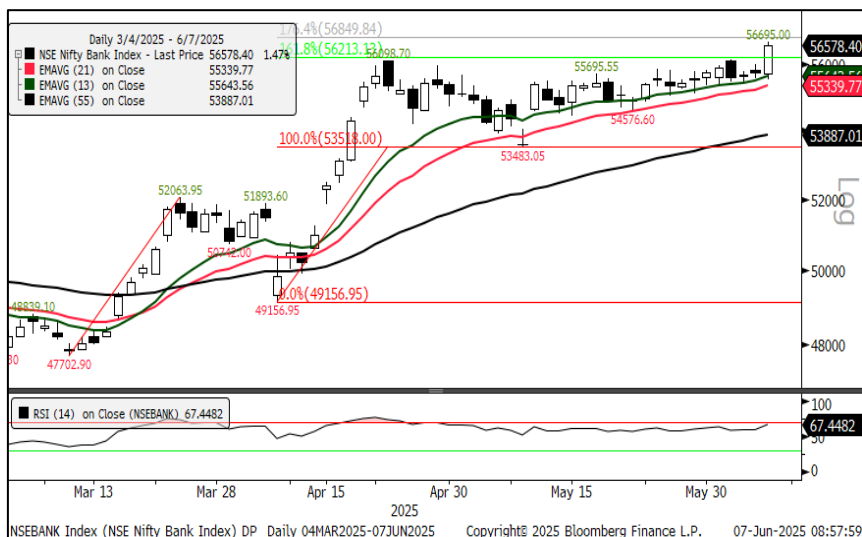
### Spot Nifty50 Index View:

- The Nifty 50 found support at the 21-day Exponential Moving Average (EMA).
  - It has resistance at 25300 and support at 24460.
  - The short-term moving average is placed above the medium-term moving average.
  - The RSI is heading higher, indicating positive momentum.
  - The bullish view remains intact until it breaks 24400.
- **Nifty50 Index: Bullish**
  - **Supt. 24460 Resi. 25300**



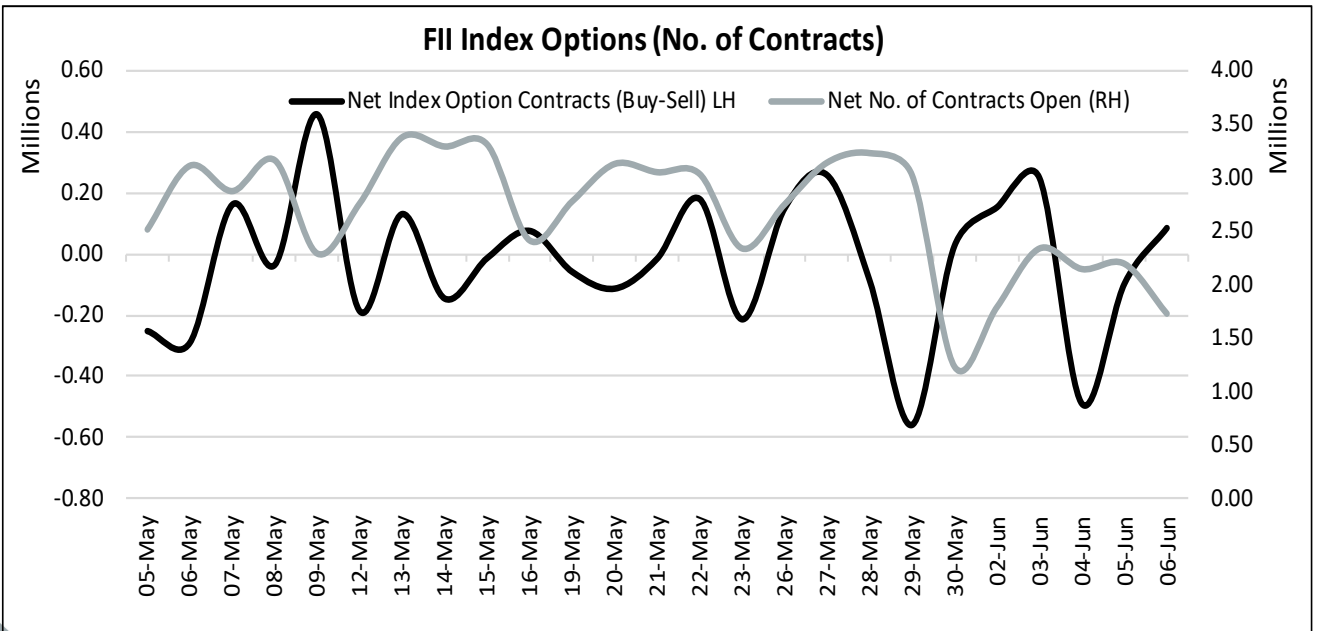
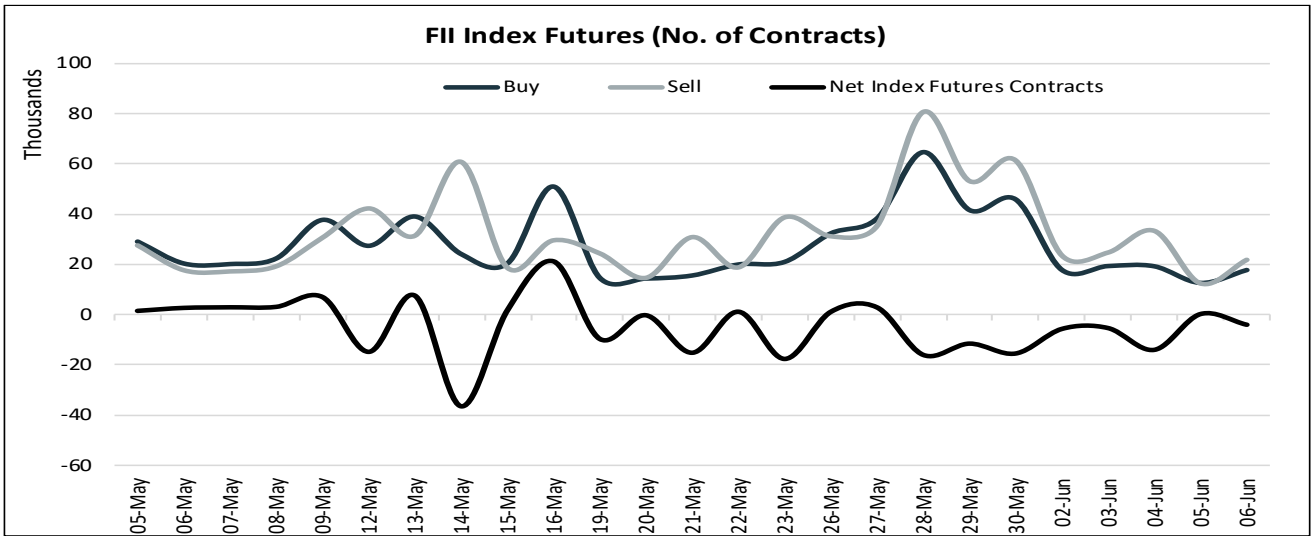
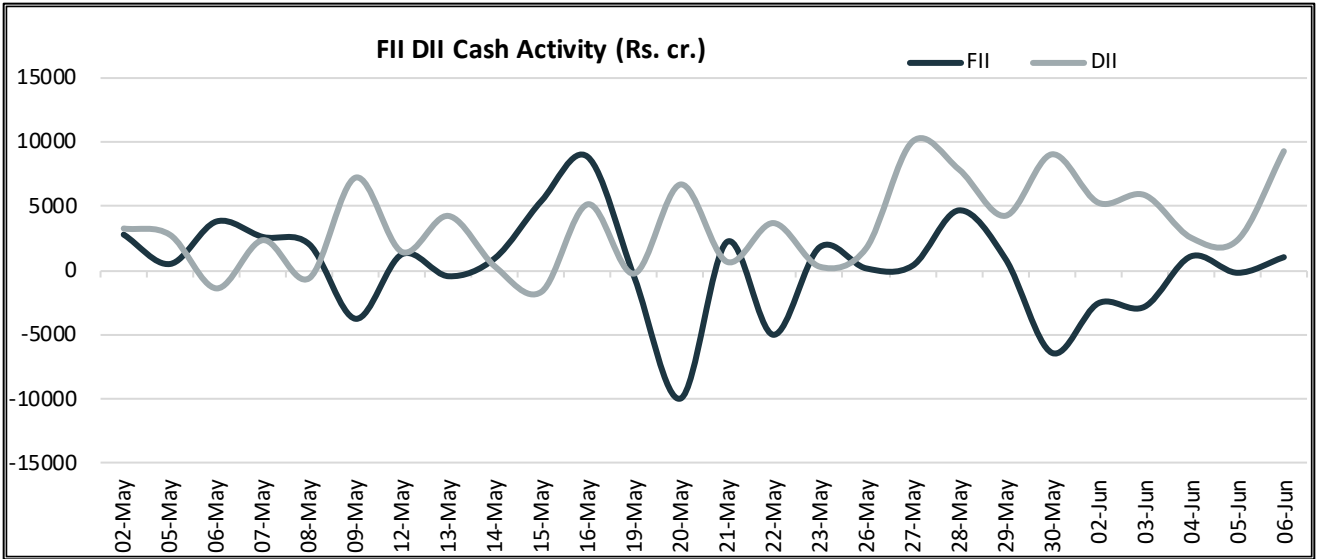
### Spot Bank Nifty Index View:

- The Bank Nifty holding support of 13 DEMA and crossed the 161.8% extension.
  - Momentum oscillator, RSI of 14 is placed above 50 and heading north, indicating positive momentum.
  - It has given an upward breakout from a flag pattern.
- **Spot Bank Nifty: Bullish**
  - **Supt. 55300 Resi. 57500**



# 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 25000 Strikes*

### OI Positions:

**Highest: 25000 strikes**

**76.63 lakh contracts**

### Major Changes in OI:

**OI Reduction:** 25000 CE & 24900 PE

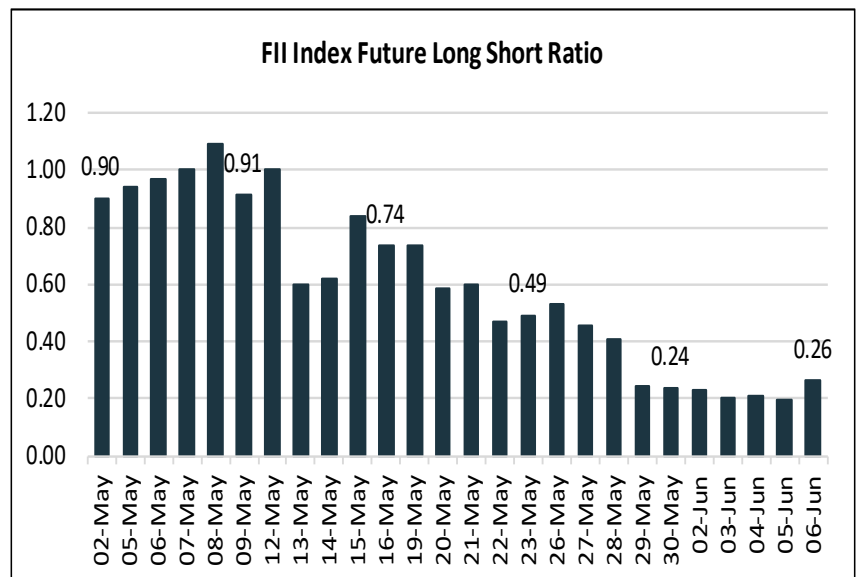
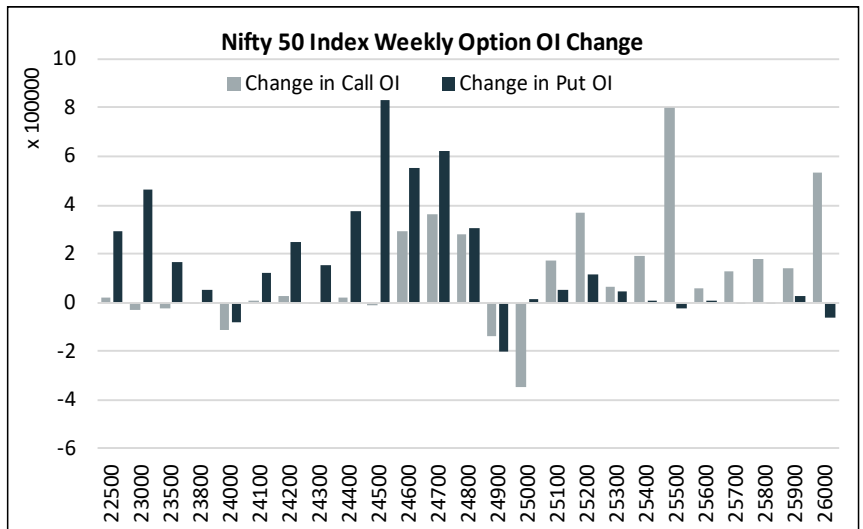
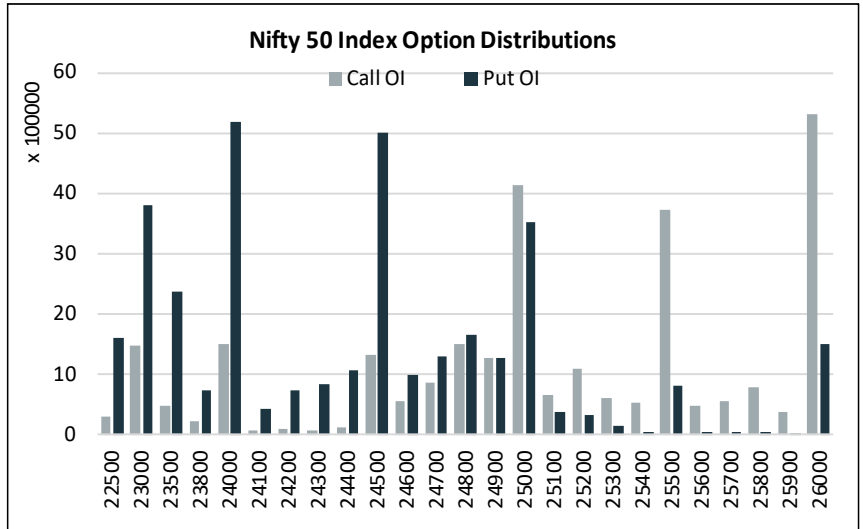
**OI Addition:** 26300 CE & 24500 PE

**High Open Interest (Weekly):**

**Addition:** 24700 strike

**Reduction:** 24900 strike

*Looking at the above observations, the Nifty50 Index could find support at 24000 and resistance at 26000*



**FII Index's future long-to-short ratio improves to 0.26 from 0.24**

# Equity Weekly Research Report

Economic Calendar					
Date	Country	Event	Period	Survey	Prior
09-Jun	Japan	GDP Annualized SA QoQ	1Q F	-0.70%	-0.70%
	Japan	GDP Nominal SA QoQ	1Q F	0.80%	0.80%
	China	PPI YoY	May	-3.10%	-2.70%
	China	CPI YoY	May	-0.20%	-0.10%
	China	Trade Balance	May	\$101.05b	\$96.18b
10-Jun	UK	Claimant Count Rate	May	--	4.50%
	UK	Jobless Claims Change	May	--	5.2k
	EC	Sentix Investor Confidence	Jun	-5.5	-8.1
	US	NFIB Small Business Optimism	May	95.8	95.8
11-Jun	Japan	PPI YoY	May	3.50%	4.00%
	US	MBA Mortgage Applications	06-Jun	--	-3.90%
	US	CPI YoY	May	2.50%	2.30%
	US	Federal Budget Balance	May	-\$314.1b	\$258.4b
12-Jun	UK	Industrial Production YoY	Apr	-0.20%	-0.70%
	UK	Manufacturing Production YoY	Apr	0.50%	-0.80%
	UK	Trade Balance GBP/Mn	Apr	-£4500m	-£3696m
	India	CPI YoY	May	3.00%	3.16%
	US	Initial Jobless Claims	07-Jun	241k	247k
	US	Continuing Claims	31-May	1910k	1904k
13-Jun	Japan	Industrial Production YoY	Apr F	--	0.70%
	EC	Trade Balance SA	Apr	20.0b	27.9b
	EC	Industrial Production WDA YoY	Apr	1.40%	3.60%
	EC	Trade Balance NSA	Apr	--	36.8b
	US	U. of Mich. Sentiment	Jun P	53.5	52.2
	India	Foreign Exchange Reserves	06-Jun	--	\$691.5b
	India	Trade Balance	May	-\$25400m	-\$26420m

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