



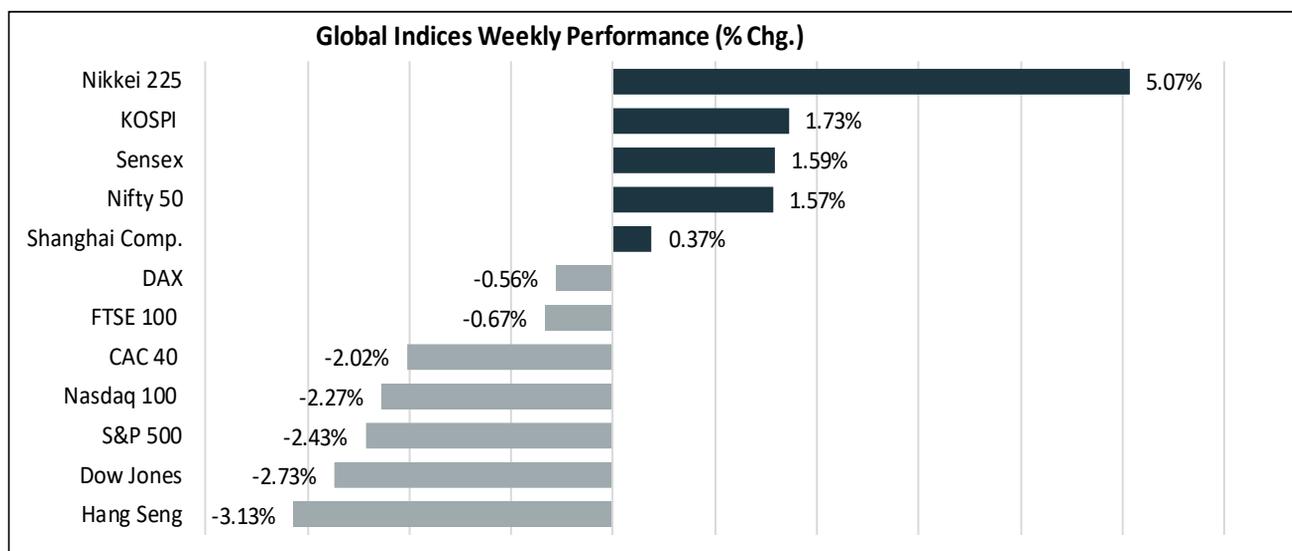
STAT EDGE

Equity Weekly Research Report

11 October 2025

Equity Weekly Research Report

Global Indices Weekly Performance



Market Summary & Outlook:

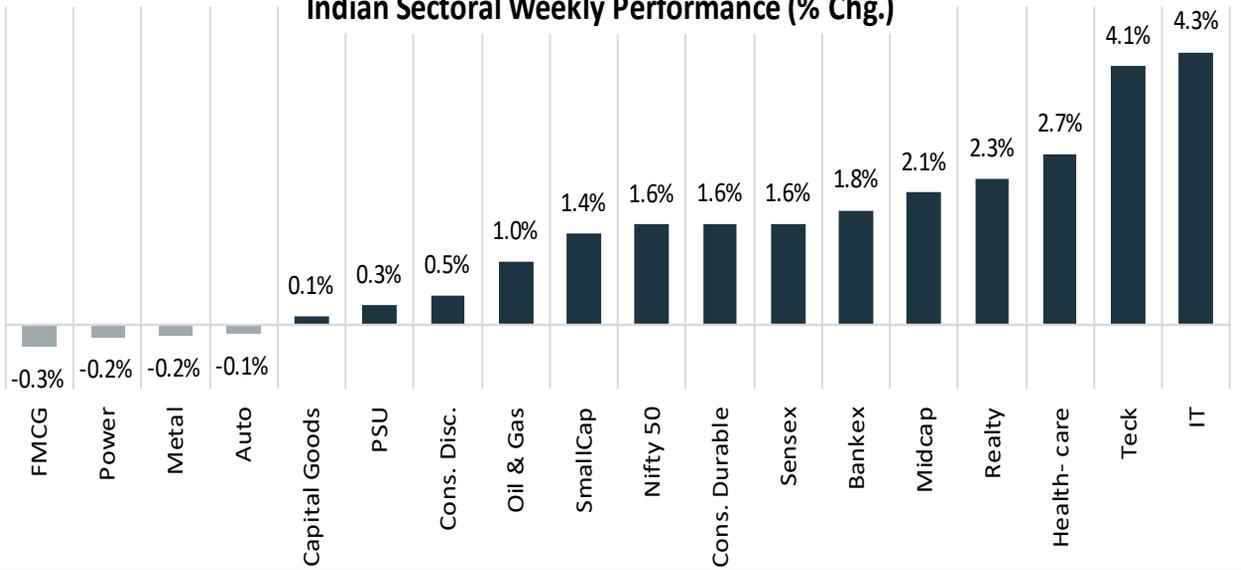
- During the past week, global equity markets presented a mixed narrative, marked by regional divergence and sector-specific movements. While most Asian indices recorded gains, buoyed by domestic catalysts and policy clarity, developed markets trended lower, weighed down by profit-taking in technology stocks and macroeconomic uncertainties.
- In a largely upbeat week for Asian equities, several key benchmarks closed on a positive note, underpinned by renewed investor confidence and supportive capital flows.
- Japan's Nikkei 225 emerged as the standout performer, surging ahead after the country's recent general election. The victory of pro-growth political factions has galvanised market sentiment, with investors anticipating expansionary economic policies, structural reforms, and enhanced support for innovation and digital transformation.
- In contrast, developed equity markets witnessed a pullback, with the United States leading the decline. The NASDAQ and S&P 500 came under pressure as investors unwound long positions, particularly in the high-flying technology sector. This sell-off was triggered by valuation concerns, a rise in bond yields, and caution ahead of key economic data. The rotation away from tech signalled a temporary pause in the sector's dominance, as market participants reassessed growth expectations.
- India's equity markets also posted notable gains for the week. A key driver behind the rally was the resurgence of foreign institutional investment amid improving macro fundamentals and expectations of stable corporate earnings. This foreign participation was further complemented by robust domestic buying activity, with retail and institutional investors showing sustained interest. Sectors such as financials, infrastructure, and consumer durables led the advance, reflecting confidence in India's growth narrative.
- Indian Sectoral Performance: The Information Technology (IT) and Technology (Teck) sectors outperformed all others, emerging as the top gainers for the week. On the flip side, the Fast-Moving Consumer Goods (FMCG) sector emerged as the biggest laggard.

Commodity Performance			
Commodity	10-Oct-25	03-Oct-25	% Change
Gold Spot \$/Oz	4017.79	3886.54	3.38%
Silver Spot \$/Oz	50.15	48.00	4.47%
WTI Crude Oil Fut	58.90	60.88	-3.25%
Currency Performance			
Currency	10-Oct-25	03-Oct-25	% Change
Dollar Index Spot	98.98	97.72	1.28%
Euro Spot	1.1619	1.1742	-1.05%
British Pound Spot	1.336	1.348	-0.89%
Japanese Yen Spot	151.19	147.47	2.52%
Chinese Yuan Spot	7.1453	7.1364	0.12%
USDINR	88.69	88.78	-0.10%
EURINR	102.65	104.21	-1.50%
GBPINR	117.87	119.45	-1.32%

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	Oct-25	25464	24973	25411	1.62%	230521	-9685	-4.00%	58958	-1961	-3%
Bank Nifty Fut	Oct-25	57009	55916	56862	1.80%	49704	-5071	-9.00%	27098	8522	46%
Index	Close	Pivot	Supt.3	Supt.2	Supt.1	Resi.1	Resi.2	Resi.3	20 DMA	50 DMA	RSI
Nifty Fut	25411	25283	24301	24792	25101	25593	25774	26265	25142	24936	61.00
Bank Nifty Fut	56862	56596	54410	55503	56183	57275	57689	58781	55587	55319	66.60

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Indian Sectoral Weekly Performance (% Chg.)



Technical Outlooks:

Spot Nifty50 Index View:

- The Nifty50 index has two possibilities: one to form a bearish head and shoulder, and the second to continue with higher highs and lows.
- It has been trading well above the medium-term moving averages.
- The RSI is placed near the overbought zone, indicating positive momentum.

- **Nifty50 Index: Indecisive**
- **Supt. 24550 Resi. 25500**



Spot Bank Nifty Index View:

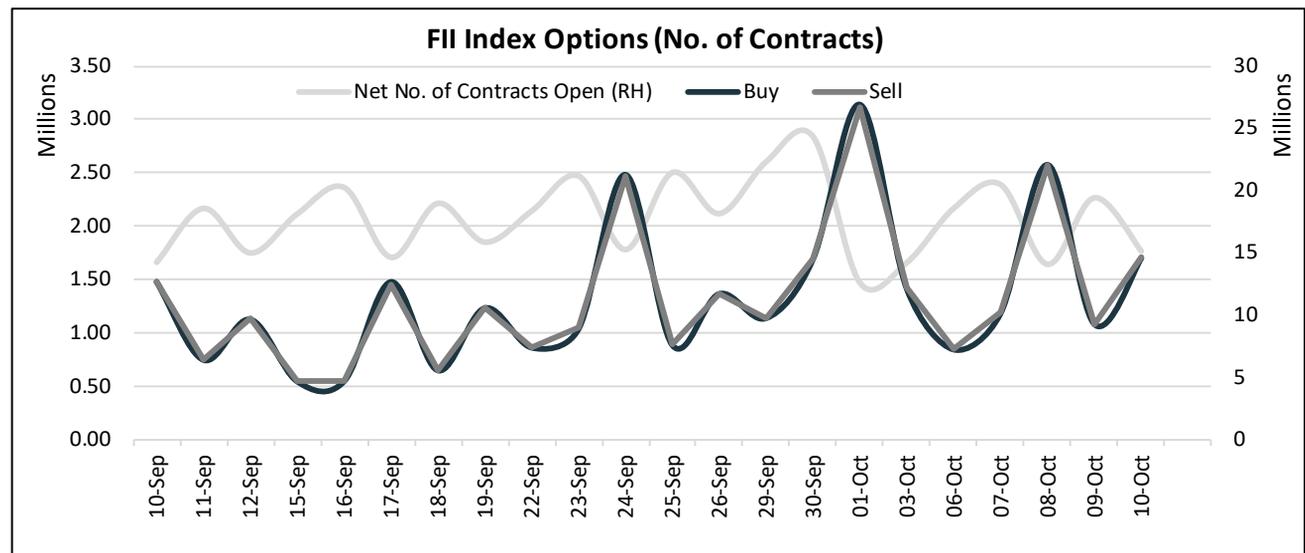
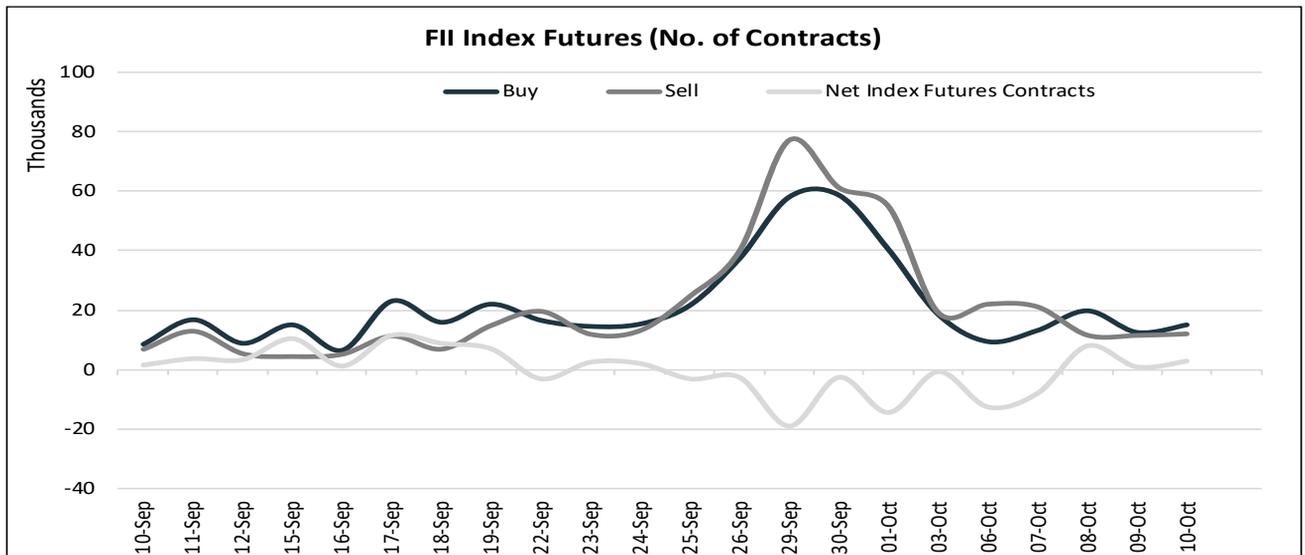
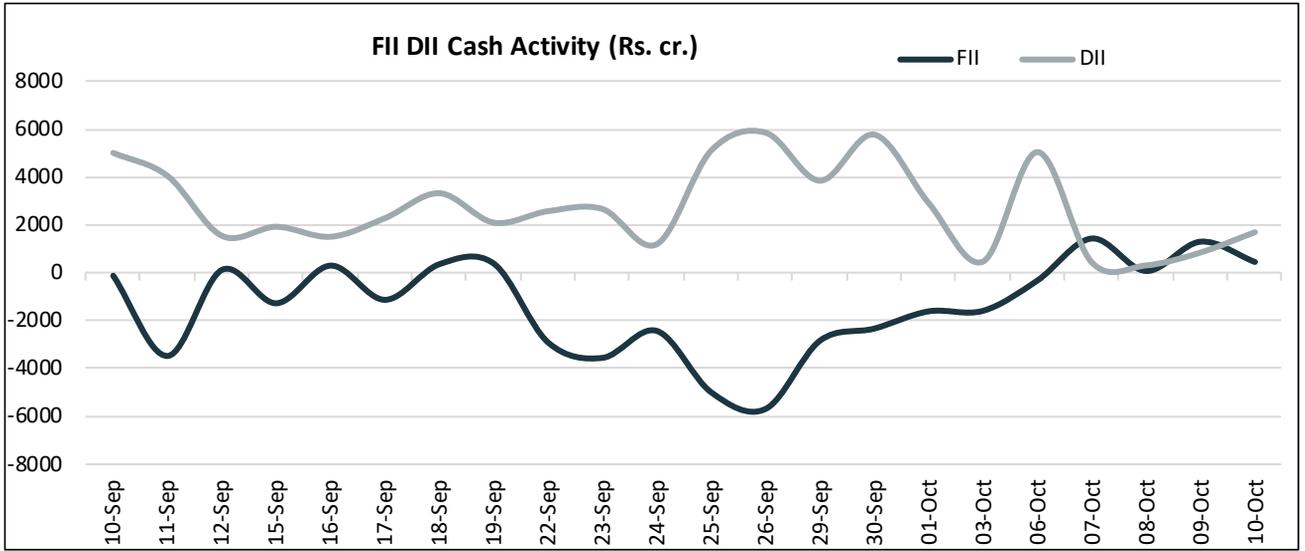
- The Bank Nifty has been forming a bullish head and shoulder pattern with neckline resistance at 55470.
- Momentum oscillator, RSI of 14 turned up and placed above 50.
- It has been placed well above the medium-term moving averages.

- **Spot Bank Nifty: Bullish**
- **Supt. 54400 Resi. 57400**



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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

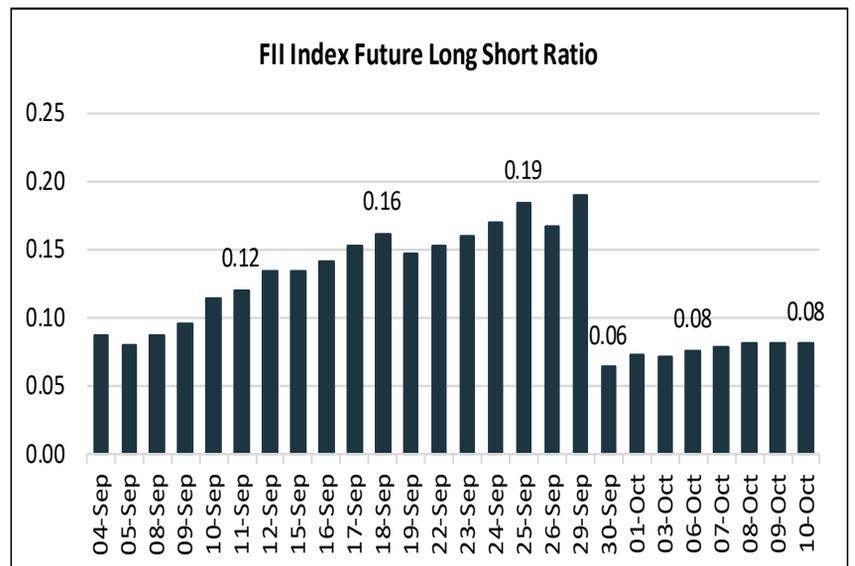
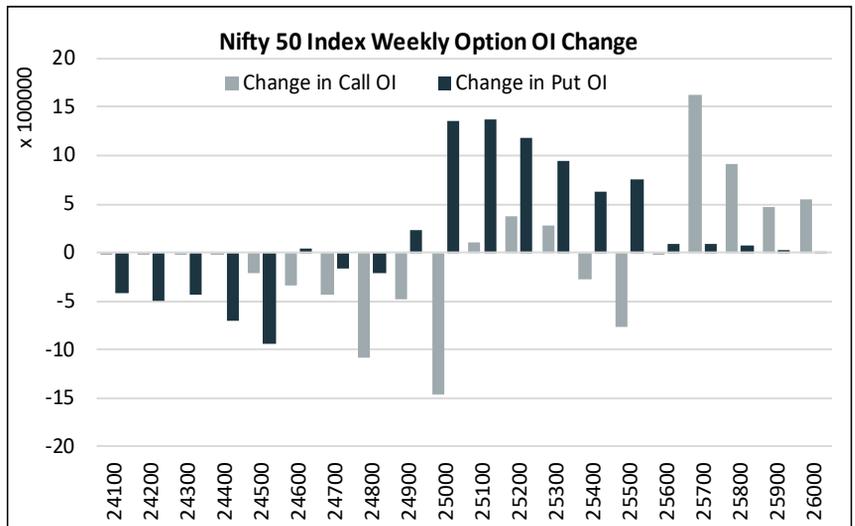
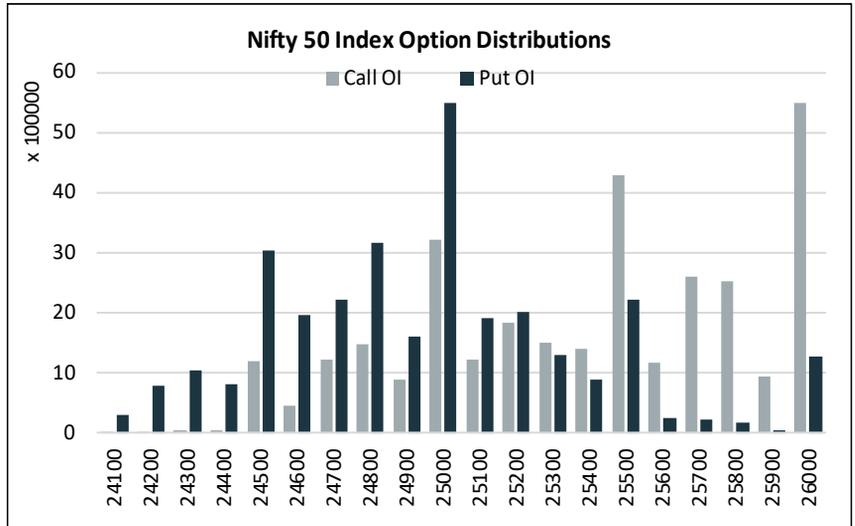
OI Positions:

Highest: 25000 strikes
87 lakh contracts

Major Changes in OI:

OI Addition: 25700 CE & 25100 PE
OI Reduction: 25000CE & 24500 PE
High Activity by Open Interest:
Addition: 25700 strike

Looking at the above observations, the Nifty50 Index could find support at 24500 and resistance at 25500



FII Index's future long-to-short ratio inched up from 0.07 to 0.08

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Economic Calendar					
Date	Country	Event	Period	Survey	Prior
13-Oct	India	CPI YoY	Sep	1.50%	2.07%
	China	Trade Balance	Sep	\$98.20b	\$102.33b
14-Oct	UK	ILO Unemployment Rate 3Mths	Aug	4.70%	4.70%
	UK	Claimant Count Rate	Sep	--	4.40%
	UK	Jobless Claims Change	Sep	--	17.4k
	India	Wholesale Prices YoY	Sep	0.37%	0.52%
	EC	ZEW Survey Expectations	Oct	--	26.1
	US	NFIB Small Business Optimism	Sep	100.6	100.8
15-Oct	China	CPI YoY	Sep	-0.20%	-0.40%
	Japan	Industrial Production YoY	Aug F	--	-1.30%
	Japan	Capacity Utilization MoM	Aug	--	-1.10%
	EC	Industrial Production WDA YoY	Aug	-0.20%	1.80%
	US	MBA Mortgage Applications	10-Oct	--	-4.70%
	US	Empire Manufacturing	Oct	-1.7	-8.7
	US	Fed Releases Beige Book			
	India	Unemployment Rate	Sep	--	5.10%
	India	Trade Balance	Sep	-\$26000m	-\$26490m
16-Oct	UK	Monthly GDP (MoM)	Aug	0.10%	0.00%
	UK	Industrial Production YoY	Aug	-0.70%	0.10%
	UK	Manufacturing Production YoY	Aug	-1.00%	0.20%
	UK	Construction Output YoY	Aug	1.50%	2.40%
	EC	Trade Balance SA	Aug	--	5.3b
	US	Continuing Claims	04-Oct	1925k	1926k
	US	New York Fed Services Business Activity	Oct	--	-19.4
	US	Philadelphia Fed Business Outlook	Oct	10	23.2
	US	Initial Jobless Claims	11-Oct	230k	--
	US	Business Inventories	Aug	0.10%	0.20%
	US	NAHB Housing Market Index	Oct	33	32
17-Oct	EC	CPI YoY	Sep F	2.20%	2.20%
	EC	CPI Core YoY	Sep F	2.30%	2.30%
	US	Housing Starts	Sep	1320k	1307k
	US	Building Permits	Sep P	1342k	1330k
	India	Foreign Exchange Reserves	10-Oct	--	\$700.0b

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