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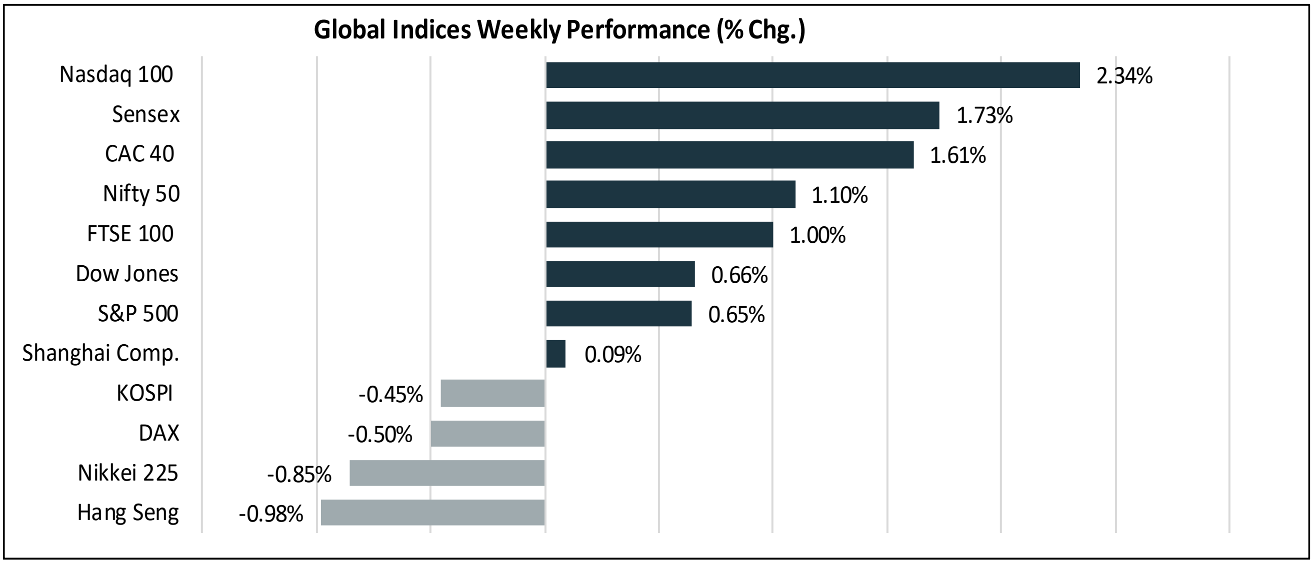
Equity Weekly Research Report

13 June 2026

Equity Weekly Research Report

Global Indices Weekly Performance



Market Summary & Outlook:

- Global equity markets delivered a mixed yet distinctly divergent performance during the week, with investor sentiment varying sharply across regions. The technology-focused Nasdaq 100 emerged as the strongest performer, advancing 2.34% on the back of robust technology earnings, continued enthusiasm for artificial intelligence-linked themes, and renewed strength in growth-oriented software and semiconductor stocks. In comparison, gains in the broader US market were more measured, with the Dow Jones Industrial Average rising 0.66% and the S&P 500 adding 0.65% as investors balanced corporate optimism against evolving macroeconomic uncertainties.
- Asian and European markets underperformed relative to their US counterparts. China's Shanghai Composite was largely unchanged, edging up just 0.09%, while South Korea's KOSPI declined 0.45%. Germany's DAX slipped 0.50%, Japan's Nikkei 225 lost 0.85%, and Hong Kong's Hang Seng was the weakest major index of the week, falling 0.98% amid subdued regional risk appetite and lingering concerns over economic growth.

Commodity Performance			
Commodity	12-Jun-26	05-Jun-26	% Change
Gold Spot $/Oz	4219.33	4328.45	-2.52%
Silver Spot $/Oz	68.02	67.83	0.28%
WTI Crude Oil Fut	84.88	90.54	-6.25%
Currency Performance			
Currency	12-Jun-26	05-Jun-26	% Change
Dollar Index Spot	99.75	100.07	-0.32%
Euro Spot	1.1568	1.1522	0.40%
British Pound Spot	1.3406	1.3342	0.48%
Japanese Yen Spot	160.24	160.29	-0.03%
Chinese Yuan Spot	6.7636	6.7907	-0.40%
USDINR	95.11	94.94	0.18%
EURINR	110.19	110.50	-0.28%
GBPINR	127.64	127.84	-0.15%

- Indian equities, however, stood out among major global markets. The Sensex climbed an impressive 1.73%, making it the second-best performer among the tracked indices, while the Nifty 50 gained 1.10%. The resilience of domestic equities was particularly noteworthy given the challenging macro backdrop. Markets maintained their upward trajectory despite continued selling by Foreign Institutional Investors (FIIs), whose sustained outflows exerted persistent pressure on sentiment. At the same time, a rise in domestic inflation heightened concerns that interest rates could remain elevated for longer, potentially delaying expectations of monetary easing.
- Sector-wise, banking stocks led the market higher and emerged as the week's best-performing segment. Investor confidence was boosted by supportive measures from the Reserve Bank of India (RBI), which strengthened expectations around liquidity conditions and financial system stability, prompting strong institutional participation in frontline banking names. In contrast, the Information Technology sector underperformed the broader market, as investors remained cautious toward export-oriented technology companies amid currency fluctuations and uncertainty surrounding global demand trends.

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	23719	23105	23687	1.00%	280000	-19874	-7.00%	110054	32265	41%
Bank Nifty Fut	Jun-26	56926	54164	56872	3.82%	79854	-3678	-4.00%	38630	-21765	-36%
Index	**Close**	**Pivot**	**Supt.3**	**Supt.2**	**Supt.1**	**Resi.1**	**Resi.2**	**Resi.3**	**10 DMA**	**20 DMA**	**RSI**
Nifty Fut	23687	23504	22276	22890	23288	23902	24118	24732	23593	23767	51.20
Bank Nifty Fut	56872	55988	50463	53225	55049	57811	58750	61512	54602	54896	63.80

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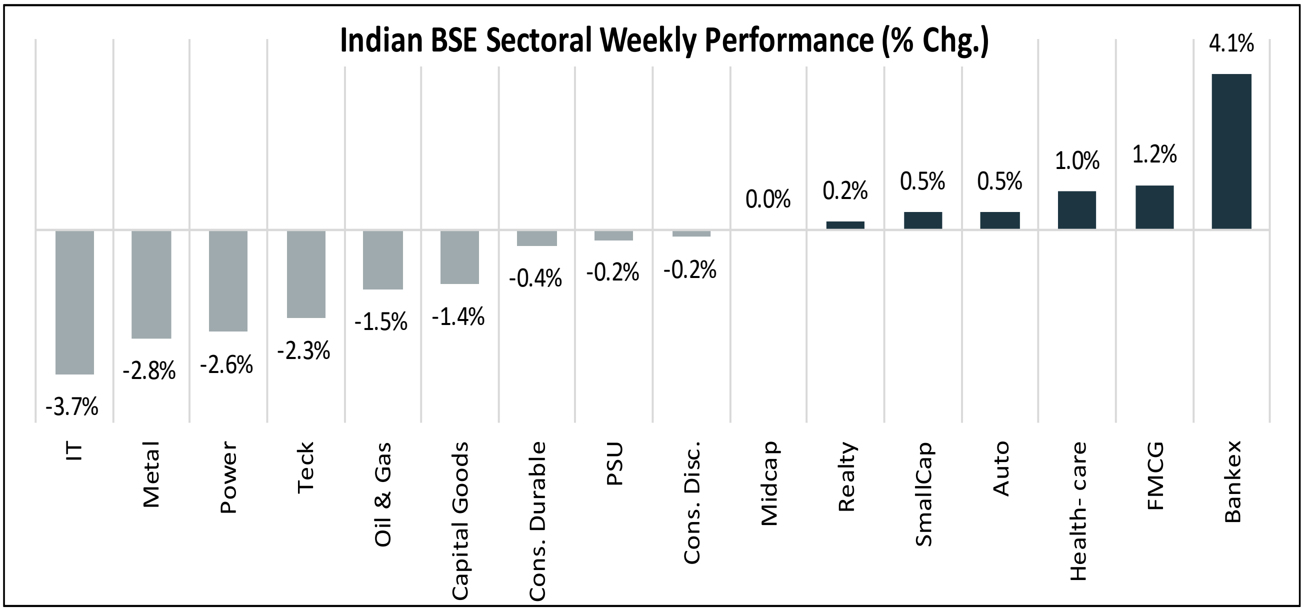


Technical Outlooks:

Spot Nifty50 Index View:

- Trend: Weak
- Bearish Channel
- Lower Highs and Lows
- Moving Average: 55 DEMA
- Momentum: RSI Turned up
- Supt.: 23200
- Resi. : 24100

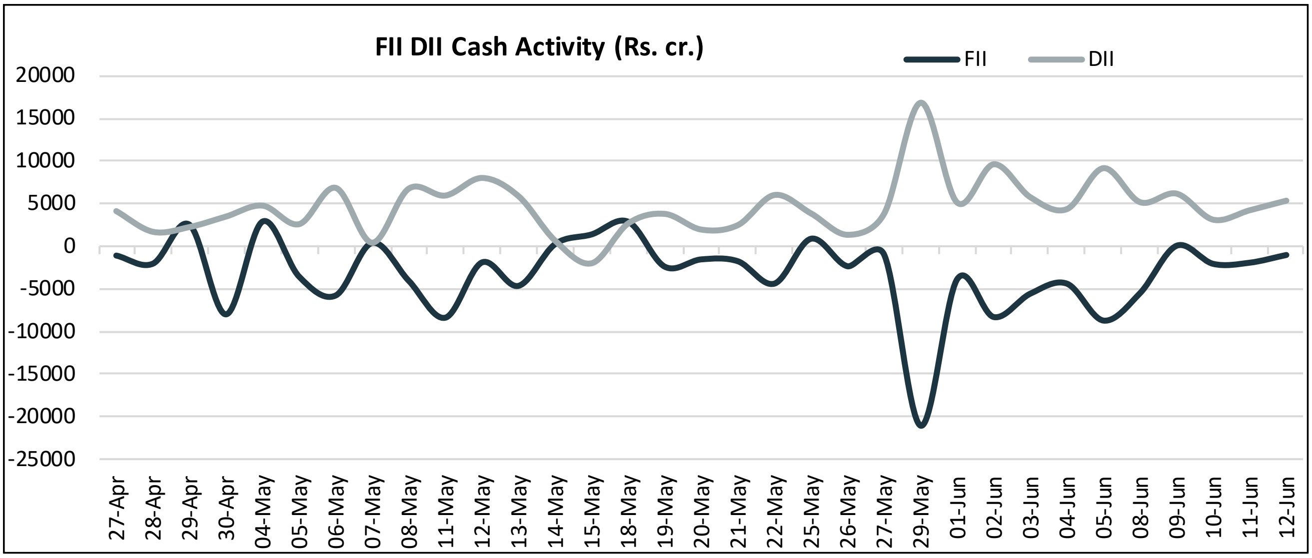
View: Short Covering

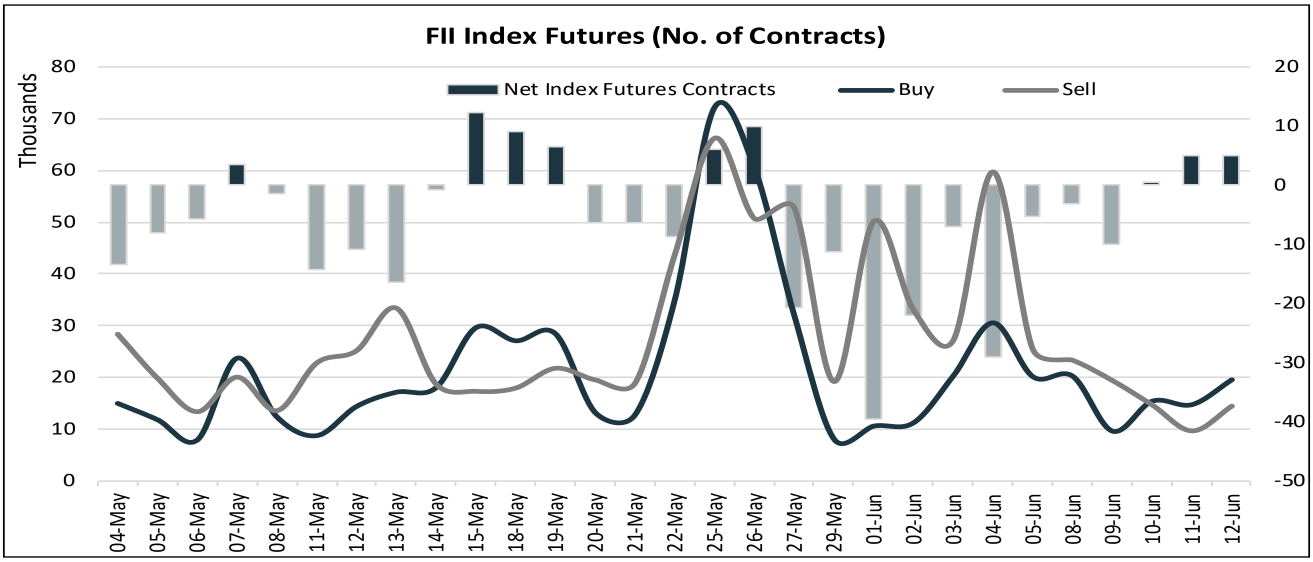
Spot Bank Nifty Index View:

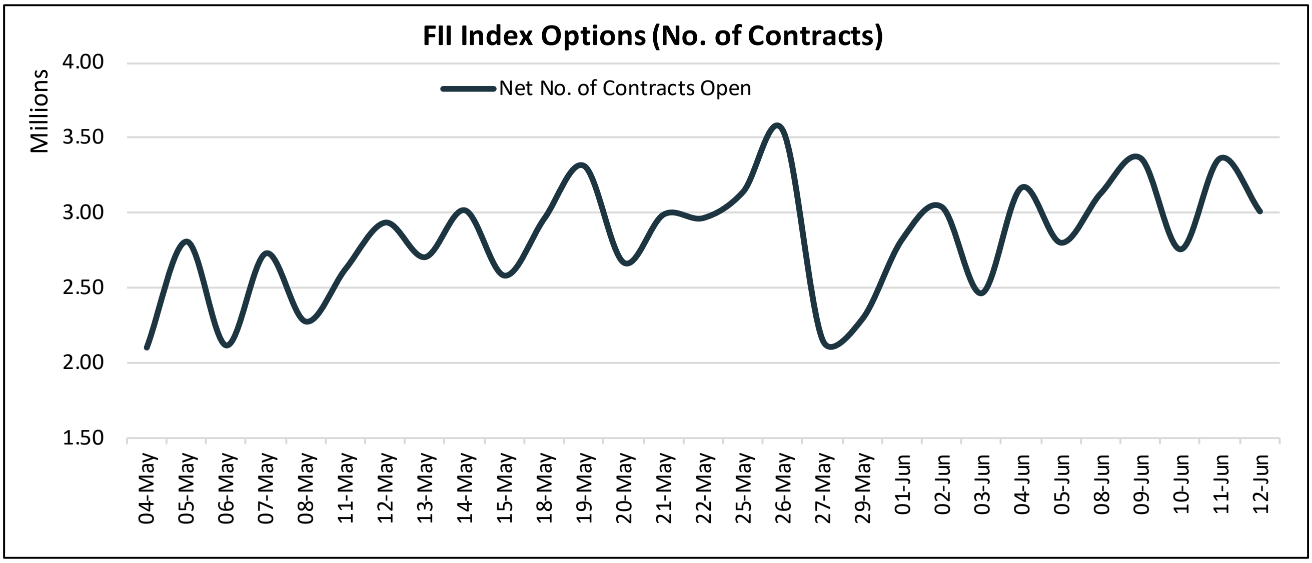
- Trend: Up
- Triangle Breakout
- Higher Highs and Lows
- Momentum: RSI heading higher
- Supt.: 55540
- Resi. : 57950

View: Bullish

Institutional Activities

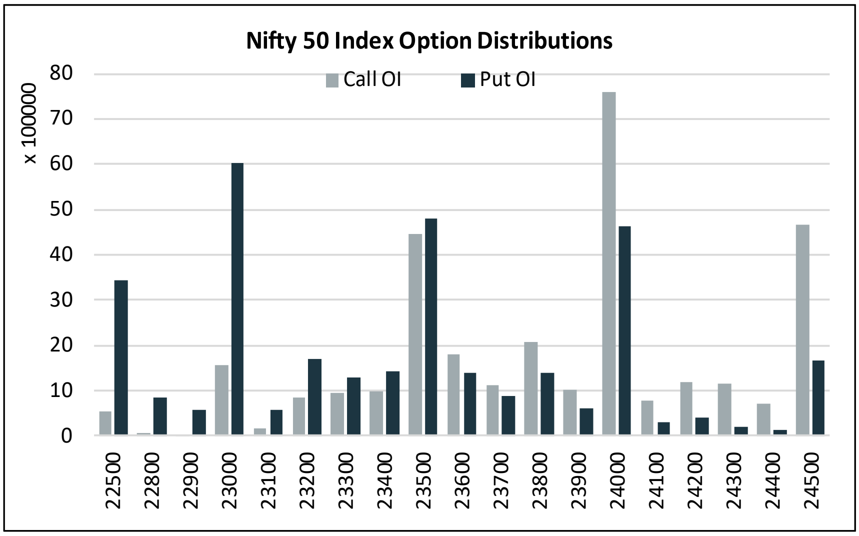






Nifty50 Index Near Month Option Distribution Analysis:

The highest open position has been seen on 25000 Strikes

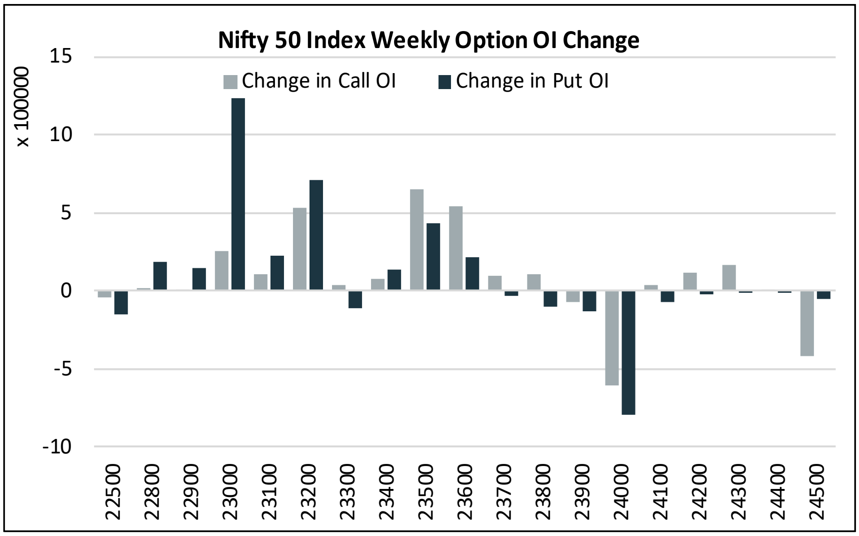


OI Positions:

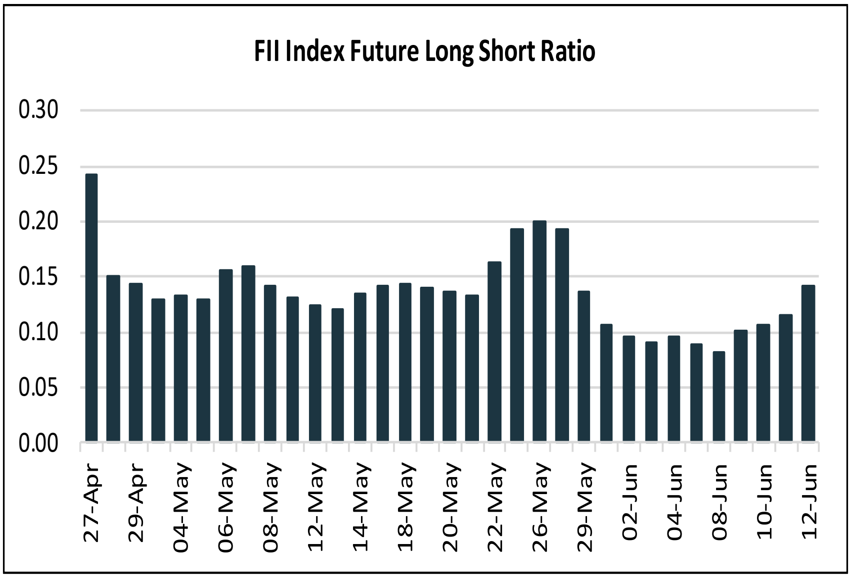
- **Highest: 25000 strikes with 130.11 lakh contracts**

Major Changes in OI:

- **Addition:** 23500 CE & 23000 PE
- **Reduction:** 24000 CE & PE
- **High Activity by Open Interest Addition**: 23000 strike



Looking at the above observations, the Nifty50 Index could find support at 23000 and resistance at 24000



FII Index's future long-to-short ratio pegged at 0.14

Economic Calendar						
Date	**Time**	**Country**	**Event**	**Period**	**Survey**	**Prior**
15-Jun	12:00	India	Wholesale Prices YoY	May	9.50%	--
	14:30	EC	Industrial Production WDA YoY	Apr	0.40%	-2.10%
	14:30	EC	Trade Balance SA	Apr	--	3.5b
	18:00	US	Empire Manufacturing	Jun	13.2	19.6
	18:45	US	Industrial Production MoM	May	0.30%	0.70%
	18:45	US	Manufacturing Production MoM	May	0.30%	0.60%
	18:45	US	Capacity Utilization	May	76.20%	76.10%
	19:30	US	NAHB Housing Market Index	Jun	37	37
		India	Trade Balance	May	-$27000m	-$28383m
16-Jun	07:00	China	New Home Prices MoM	May	--	-0.19%
	07:00	China	Used Home Prices MoM	May	--	-0.23%
	07:30	China	Retail Sales YoY	May	-0.20%	0.20%
	07:30	China	Industrial Production YoY	May	4.30%	4.10%
	14:30	EC	ZEW Survey Expectations	Jun	--	-9.1
	17:45	US	ADP Weekly Employment Change	30-May	--	29.000k
	18:00	US	Housing Starts	May	1430k	1465k
	18:00	US	Building Permits	May P	1420k	1423k
		Japan	BOJ Target Rate	16-Jun	1.00%	0.75%
17-Jun	05:20	Japan	Trade Balance	May	-¥547.6b	¥299.3b
	11:30	UK	CPI YoY	May	3.00%	2.80%
	14:00	UK	House Price Index YoY	Apr	--	0.00%
	14:30	EC	CPI YoY	May F	3.20%	3.20%
	16:30	US	MBA Mortgage Applications	12-Jun	--	10.80%
	19:30	US	Pending Home Sales MoM	May	1.00%	1.40%
	23:30	US	FOMC Rate Decision (Upper Bound)	17-Jun	3.75%	3.75%
	23:30	US	FOMC Rate Decision (Lower Bound)	17-Jun	3.50%	3.50%
18-Jun	11:30	UK	Claimant Count Rate	May	--	4.40%
	11:30	UK	Jobless Claims Change	May	--	26.5k
	13:30	EC	ECB Current Account SA	Apr	--	14.9b
	14:30	EC	Construction Output YoY	Apr	--	-1.20%
	16:30	UK	Bank of England Bank Rate	18-Jun	3.75%	3.75%
	18:00	US	Initial Jobless Claims	13-Jun	225k	229k
	18:00	US	Philadelphia Fed Business Outlook	Jun	10	-0.4
	18:00	US	Continuing Claims	06-Jun	1785k	1795k
	19:30	US	Leading Index	May	0.10%	0.10%