



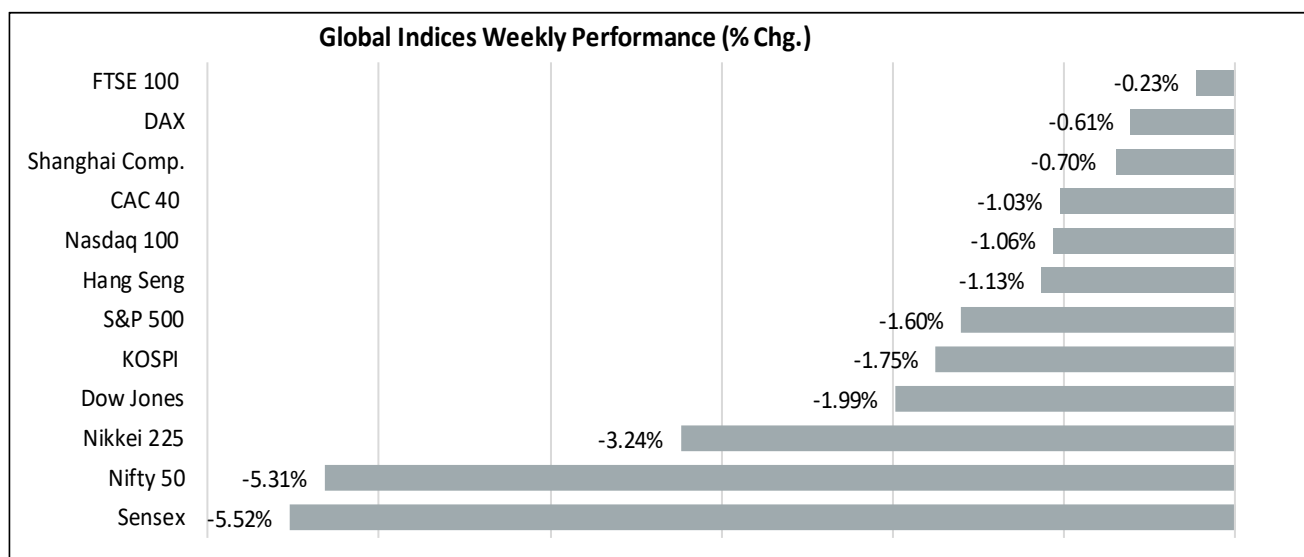
STAT EDGE

Equity Weekly Research Report

14 March 2026

Equity Weekly Research Report

Global Indices Weekly Performance



Market Summary & Outlook:

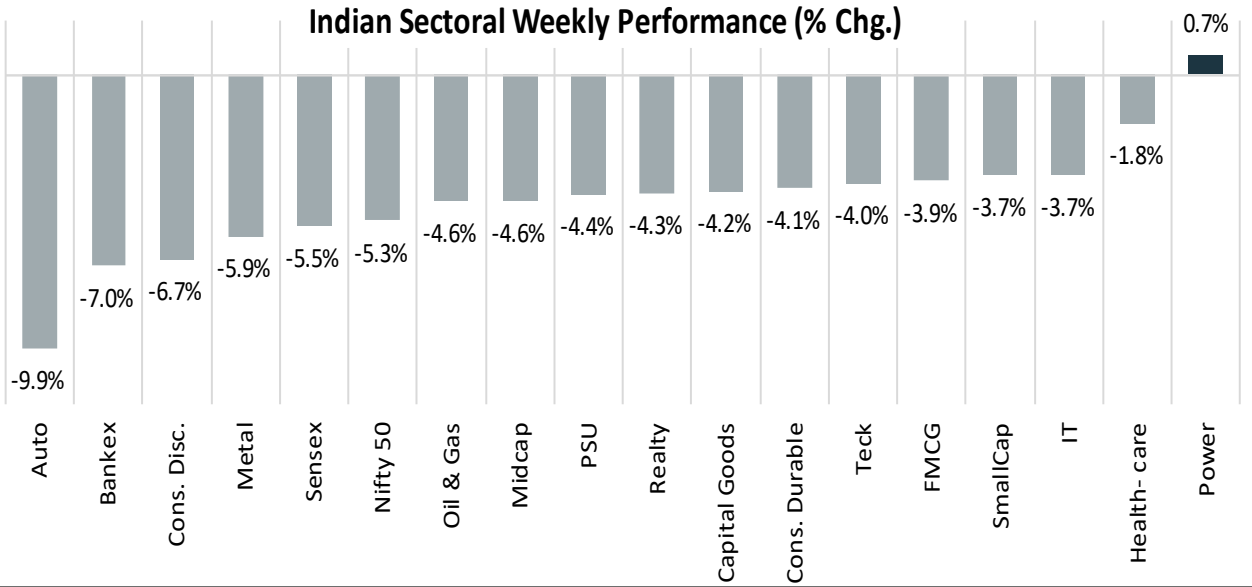
- Global equity markets were submerged in a sea of red this week as escalating geopolitical tensions and a burgeoning energy crisis triggered a widespread retreat from risk assets. From Wall Street to Tokyo, major indices faced significant selling pressure, with the Dow Jones falling nearly 2% and the Nikkei 225 shedding more than 3.2%. The intensifying conflict in the Middle East has left investors grappling with the dual threat of supply chain disruptions and persistent inflationary pressures, dampening appetite for stocks across virtually every sector.
- Central to the rout in India was the deepening energy crisis sparked by the regional conflict. As a major net importer of crude oil, India's economic outlook is particularly sensitive to the price spikes seen in crude oil prices, which have been hovering around \$100 a barrel. It has fueled fears of a widened current account deficit and higher inflation.
- European and other Asian markets also struggled to find a floor, though their losses were relatively contained compared to the Indian benchmarks. The FTSE 100 and DAX saw modest declines of 0.23% and 0.61%, respectively, while Chinese indices such as the Shanghai Composite and Hang Seng fell between 0.70% and 1.13%.
- The Indian equity market emerged as the primary casualty of this global downturn, recording the steepest declines among its international peers. The Sensex plummeted by 5.52%, while the Nifty 50 followed closely with a 5.31% loss. The sharp correction was driven by a massive exodus of foreign capital from equities, as institutional investors accelerated fund outflows in favour of safer, dollar-denominated assets. The volatility underscored the vulnerability of emerging markets to shifting global risk sentiment and a strengthening US dollar.
- The sell-off in the Indian market was felt acutely across nearly all sectors, with high-beta and consumption-oriented indices bearing the brunt of the downturn. The auto sector was the week's worst performer, plunging by a staggering 9.9%, as fears of rising input costs and supply-chain disruptions dampened investor sentiment.

Commodity Performance			
Commodity	13-Mar-26	06-Mar-26	% Change
Gold Spot \$/Oz	5019.49	5171.74	-2.94%
Silver Spot \$/Oz	80.59	84.54	-4.67%
WTI Crude Oil Fut	98.71	90.90	8.59%
Currency Performance			
Currency	13-Mar-26	06-Mar-26	% Change
Dollar Index Spot	100.36	98.99	1.39%
Euro Spot	1.1417	1.1618	-1.73%
British Pound Spot	1.323	1.3413	-1.36%
Japanese Yen Spot	159.73	157.78	1.24%
Chinese Yuan Spot	6.9065	6.903	0.05%
USDINR	92.46	91.75	0.77%
EURINR	105.89	106.20	-0.29%
GBPINR	122.61	122.25	0.30%

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	Mar-26	24420	23155	23199	-5.49%	307148	65491	27.00%	179317	89135	99%
Bank Nifty Fut	Mar-26	57397	53841	53923	-7.16%	75279	3714	5.00%	50519	10461	26%
Index	Close	Pivot	Supt.3	Supt.2	Supt.1	Resi.1	Resi.2	Resi.3	20 DMA	50 DMA	RSI
Nifty Fut	23199	23591	21062	22327	22763	24028	24856	26120	24996	25456	24.70
Bank Nifty Fut	53923	55054	47942	51498	52710	56266	58610	62165	59374	59710	23.50

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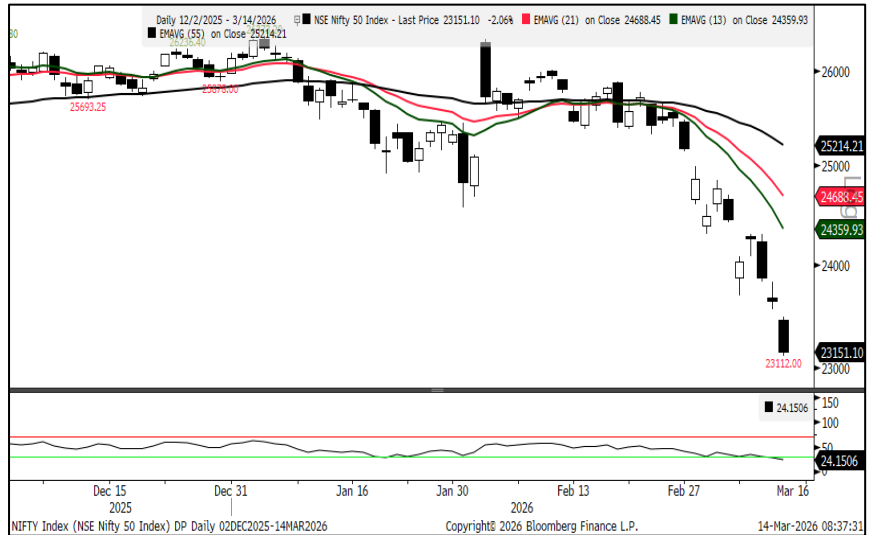
Indian Sectoral Weekly Performance (% Chg.)



Technical Outlooks:

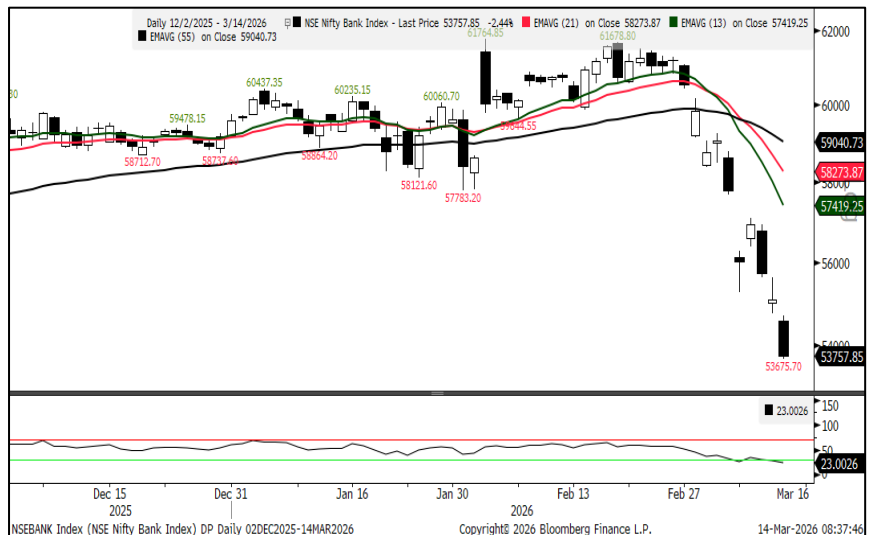
Spot Nifty50 Index View:

- The Nifty50 Index is forming a bearish chart pattern of lower highs and lows.
- The short-term moving averages are placed below the medium-term moving average.
- The RSI is placed near an oversold zone, indicating weak momentum.
- **Nifty50 Index: Negative**
- **Supt. 22500 Resi. 23600**



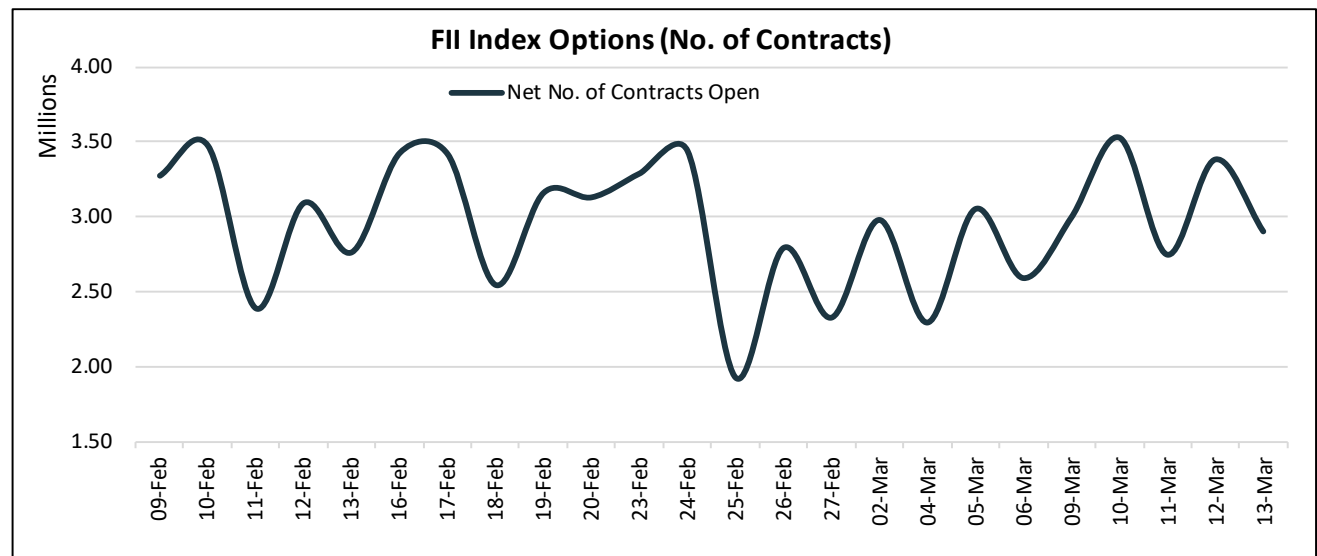
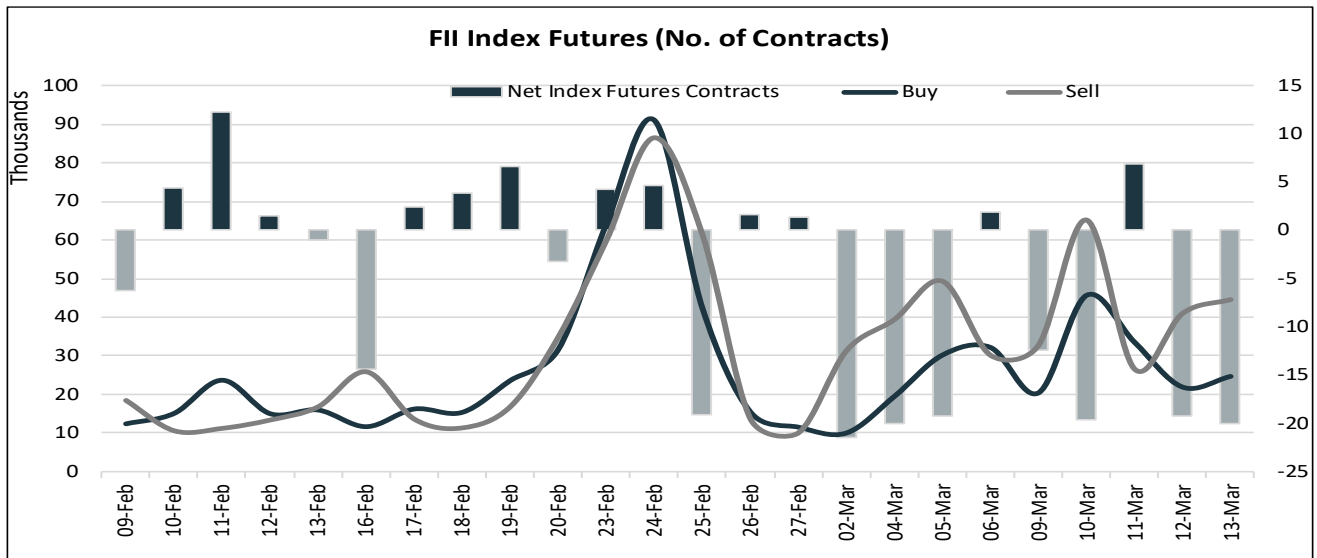
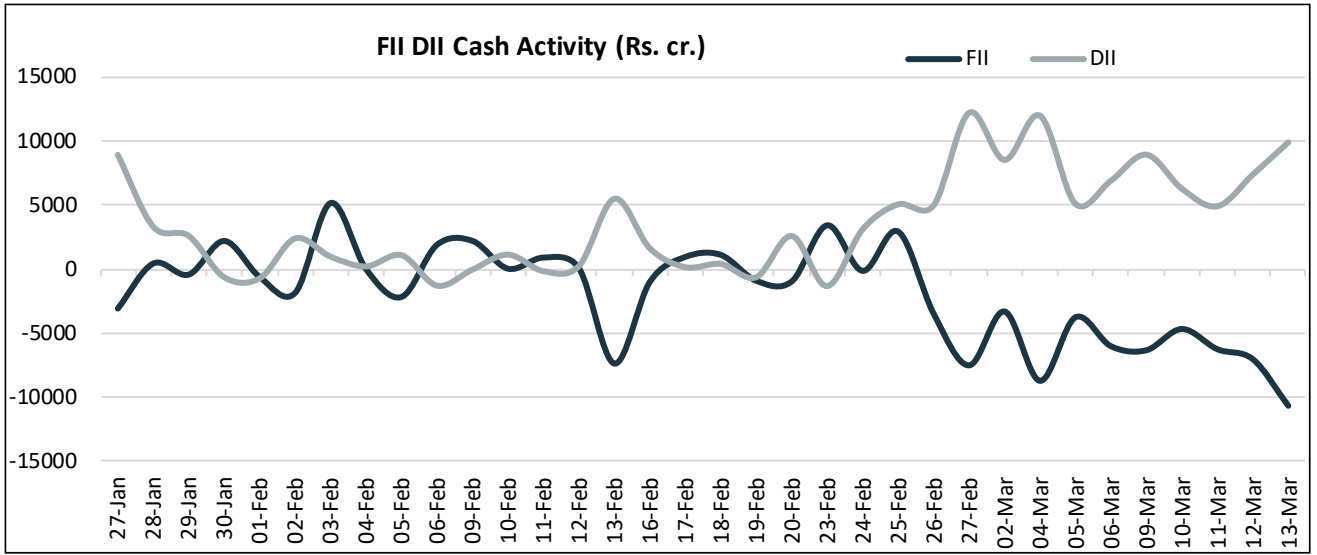
Spot Bank Nifty Index View:

- The Nifty Bank Index is placed well below the long-term moving averages.
- Daily RSI is placed in an oversold zone, exhibiting negative momentum.
- It has formed a bearish lower highs and lower lows formation on the daily chart.
- **Bank Nifty: Negative**
- **Supt. 51500 Resi. 55500**



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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 26000 Strikes

OI Positions:

Highest: 26000 strikes

101 lakh contracts

Major Changes in OI:

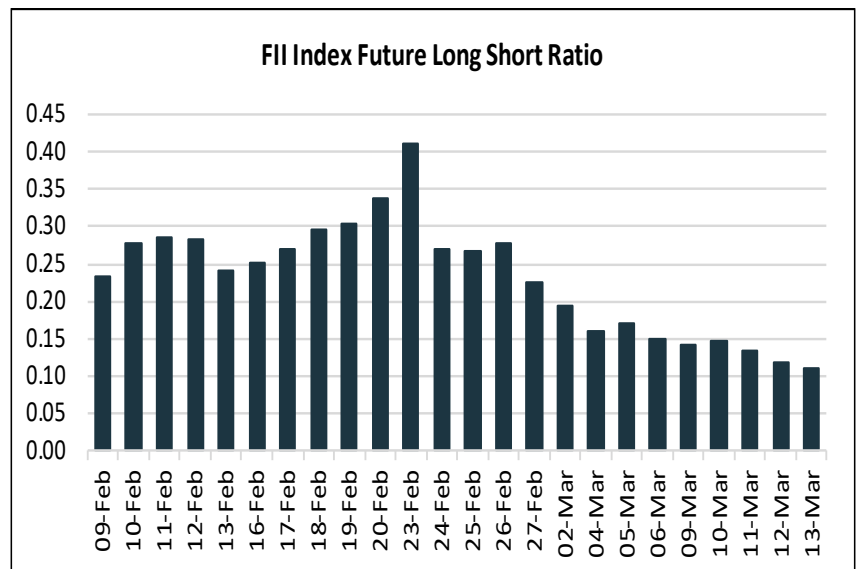
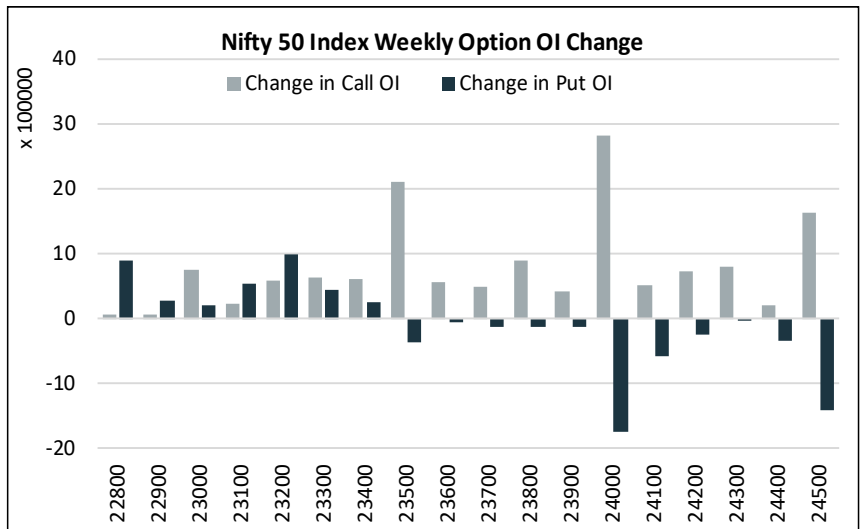
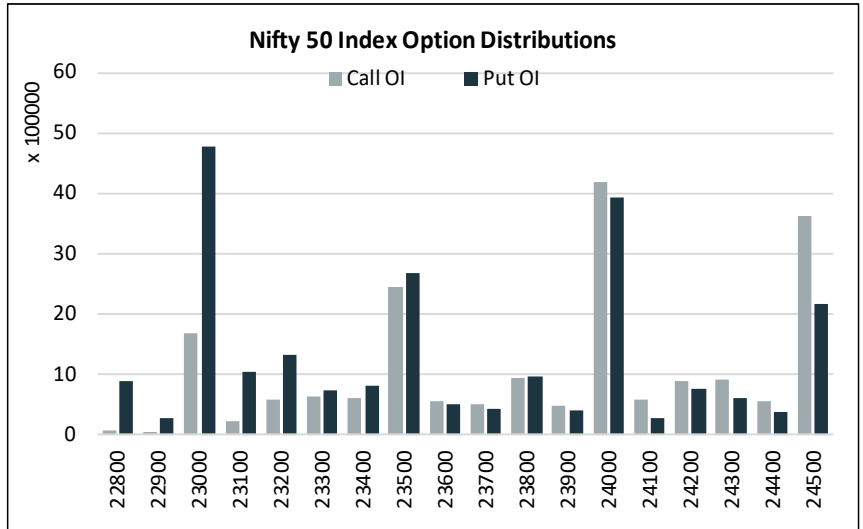
Addition: 24000 CE & 22000 PE

Reduction: 25500 CE & 24000 PE

High Activity by Open Interest:

Addition: 22000 strike

Looking at the above observations, the Nifty50 Index could find support at 22500 and resistance at 23800



FII Index's future long-to-short ratio declined from 0.15 to 0.11.

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Economic Calendar					
Date	Country	Event	Period	Survey	Prior
16-Mar	China	New Home Prices MoM	Feb	--	-0.37%
	China	Retail Sales YTD YoY	Feb	2.50%	--
	China	Industrial Production YTD YoY	Feb	5.30%	--
	India	Wholesale Prices YoY	Feb	2.10%	1.81%
	US	Empire Manufacturing	Mar	3.9	7.1
	US	Industrial Production MoM	Feb	0.10%	0.70%
	US	Capacity Utilization	Feb	76.20%	76.20%
	US	NAHB Housing Market Index	Mar	37	36
	India	Trade Balance	Feb	-\$25896m	-\$34678m
17-Mar	US	ADP Weekly Employment Change	28-Feb	--	15.500k
	US	Leading Index	Feb	-0.10%	-0.20%
	US	Pending Home Sales MoM	Feb	-0.70%	-0.80%
18-Mar	Japan	Trade Balance	Feb	-¥460.0b	-¥1163.5b
	EC	CPI YoY	Feb F	1.90%	1.90%
	EC	CPI Core YoY	Feb F	2.40%	2.40%
	US	MBA Mortgage Applications	13-Mar	--	3.20%
	US	Factory Orders	Jan	0.10%	-0.70%
	US	Durable Goods Orders	Jan F	--	0.00%
	US	FOMC Rate Decision (Upper Bound)	18-Mar	3.75%	3.75%
19-Mar	Japan	Industrial Production YoY	Jan F	--	2.30%
	UK	Claimant Count Rate	Feb	--	4.40%
	UK	Jobless Claims Change	Feb	--	28.6k
	EC	Construction Output YoY	Jan	--	-0.90%
	UK	Bank of England Bank Rate	19-Mar	3.75%	3.75%
	US	Initial Jobless Claims	14-Mar	215k	213k
	US	Continuing Claims	07-Mar	1850k	1850k
	EC	ECB Deposit Facility Rate	19-Mar	2.00%	2.00%
	US	New Home Sales	Jan	720k	745k
Japan	BOJ Target Rate	19-Mar	0.75%	0.75%	
20-Mar	China	5-Year Loan Prime Rate	20-Mar	3.50%	3.50%
	China	1-Year Loan Prime Rate	20-Mar	3.00%	3.00%
	EC	ECB Current Account SA	Jan	--	14.6b
	EC	Trade Balance SA	Jan	--	11.6b
	India	Eight Infrastructure Industries	Feb	--	4.00%

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