



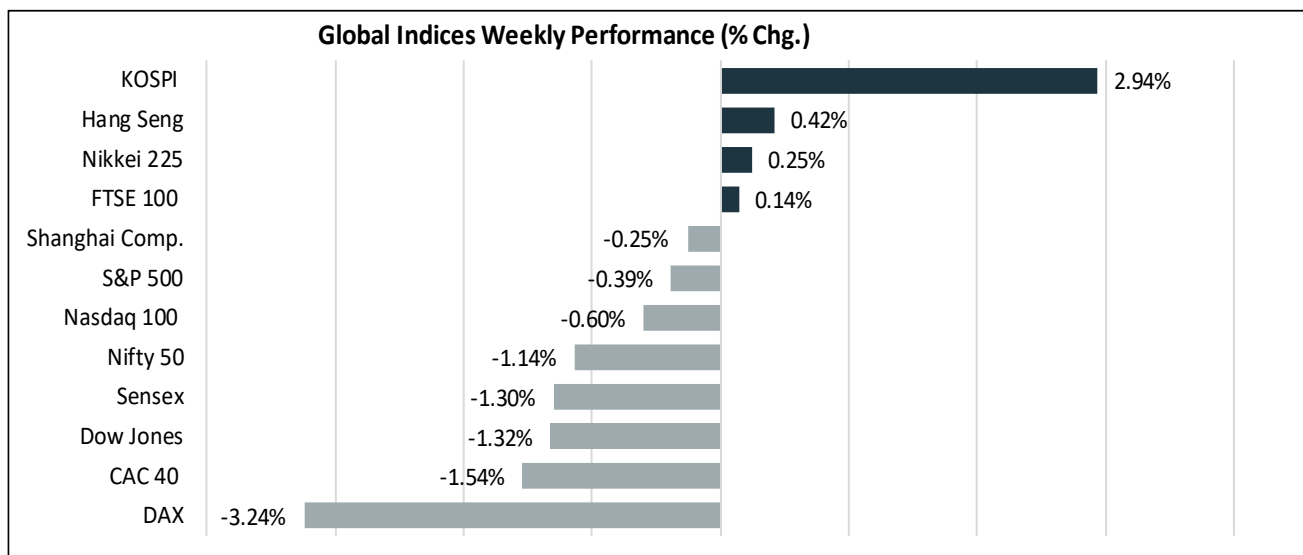
STAT EDGE

Equity Weekly Research Report

14 June 2025

Equity Weekly Research Report

Global Indices Weekly Performance



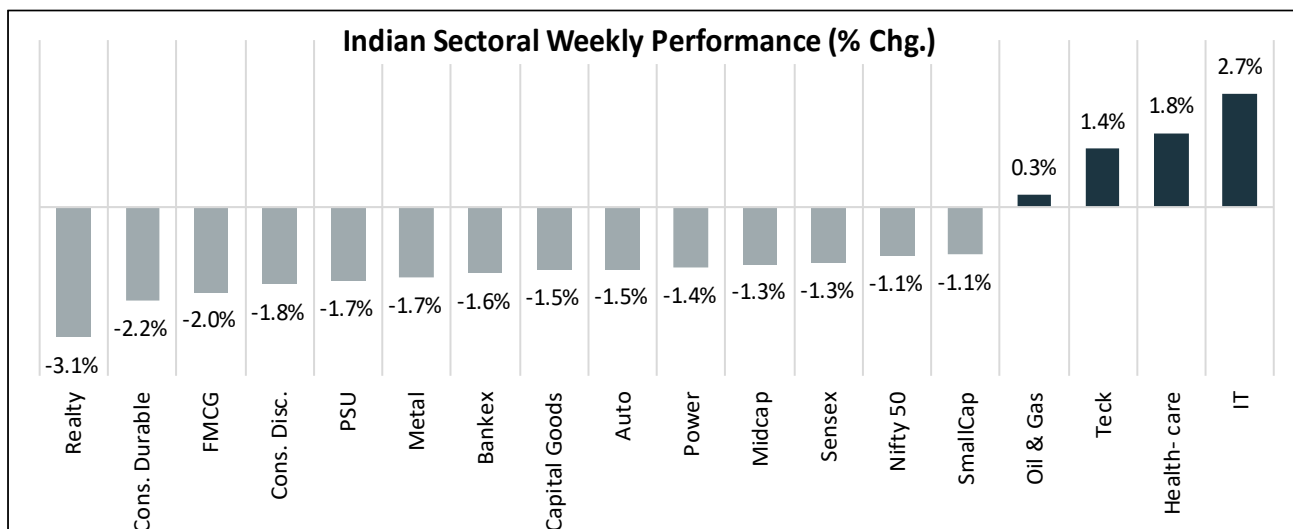
Market Summary & Outlook:

- The Korean market, particularly the KOSPI index, demonstrated another week of outperformance in the week ending June 13, 2025, primarily due to optimism surrounding post-election market reforms and robust portfolio inflows. There has been a significant increase in foreign investment flowing into Korean assets, including equities and bonds. This influx of capital has contributed to the appreciation of the Korean won and supported the stock market.
- Germany's benchmark stock index remained the laggard among the major equity markets, primarily due to a confluence of global geopolitical tensions and lingering economic concerns within the Eurozone.
- The S&P 500 concluded the trading week with a slight depreciation, as a tumultuous Friday session entirely eroded the incremental gains accumulated over the preceding days. The market opening on Friday morning was marked by a significant downward gap, triggered by the unsettling reports of Israel initiating strikes against Iranian nuclear installations. This geopolitical development immediately propelled crude oil futures to surge dramatically, which in turn catalysed a notable outperformance within the energy sector.
- The Indian market's decline, driven by foreign fund selling and surging crude oil prices, was a direct consequence of the global geopolitical instability emanating from the Middle East, which amplified India's inherent economic sensitivities to oil prices and capital flows. Among sector performances, Information Technology and Tech emerged as the major gainers, benefiting from a weaker local rupee that supports export-driven earnings. In contrast, interest-sensitive Real Estate continued to lag, pressured by ongoing rate concerns and the expectation of a pause in interest rates.

Commodity Performance			
Commodity	13-Jun-25	06-Jun-25	% Change
Gold Spot \$/Oz	3432.34	3310.42	3.68%
Silver Spot \$/Oz	36.30	35.98	0.90%
WTI Crude Oil Mar25	72.98	64.58	13.01%
Currency Performance			
Currency	13-Jun-25	06-Jun-25	% Change
Dollar Index Spot	98.18	99.19	-1.01%
Euro Spot	1.1549	1.1397	1.33%
British Pound Spot	1.3571	1.3528	0.32%
Japanese Yen Spot	144.07	144.85	-0.54%
Chinese Yuan Spot	7.1892	7.1886	0.01%
USDINR	86.09	85.64	0.53%
EURINR	99.2175	97.7984	1.45%
GBPINR	116.59	115.90	0.60%

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-25	25307	24575	24727	-1.47%	157672	-4736	-3.00%	89998	-19891	-18%
Bank Nifty Fut	Jun-25	57165	55351	55614	-2.04%	65197	-4635	-7.00%	39580	-74980	-65%
Index	Close	Pivot	Supt.3	Supt.2	Supt.1	Resi.1	Resi.2	Resi.3	20 DMA	50 DMA	RSI
Nifty Fut	24727	24870	23407	24138	24433	25165	25602	26333	24894	24338	49.20
Bank Nifty Fut	55614	56043	52414	54229	54922	56736	57858	59673	55888	54651	50.10

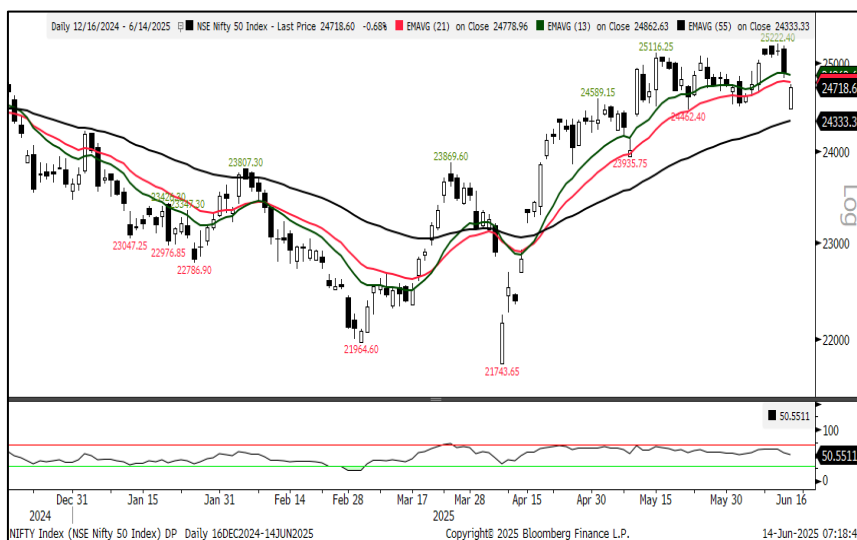
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Technical Outlooks:

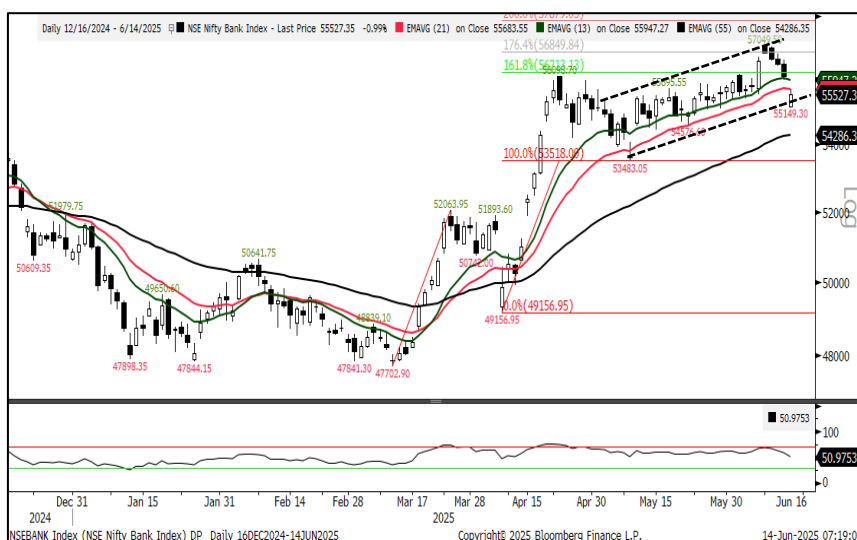
Spot Nifty50 Index View:

- The Nifty 50 closed below the 21-day Exponential Moving Average (EMA).
 - However, the short-term moving average is placed above the medium-term moving average.
 - The RSI is heading lower, indicating a negative momentum.
 - The short-term profit booking is on the cards amid weaker closing.
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- **Nifty50 Index: Profit Booking**
 - **Supt. 24300 Resi. 25250**



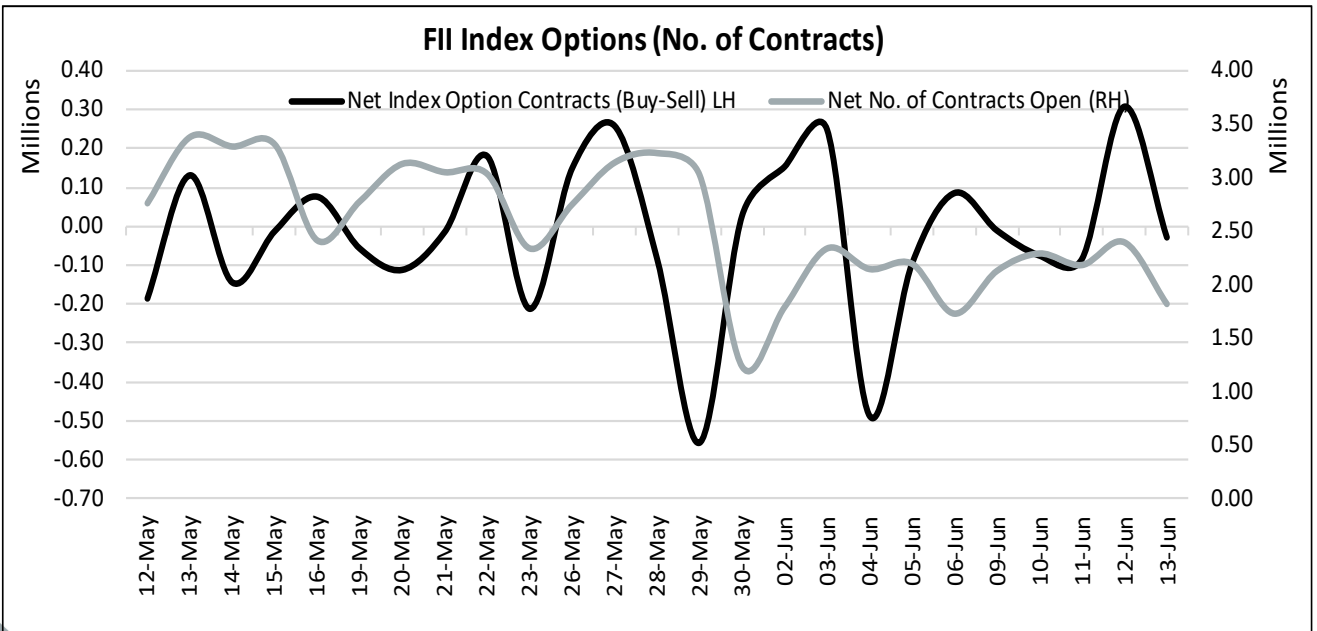
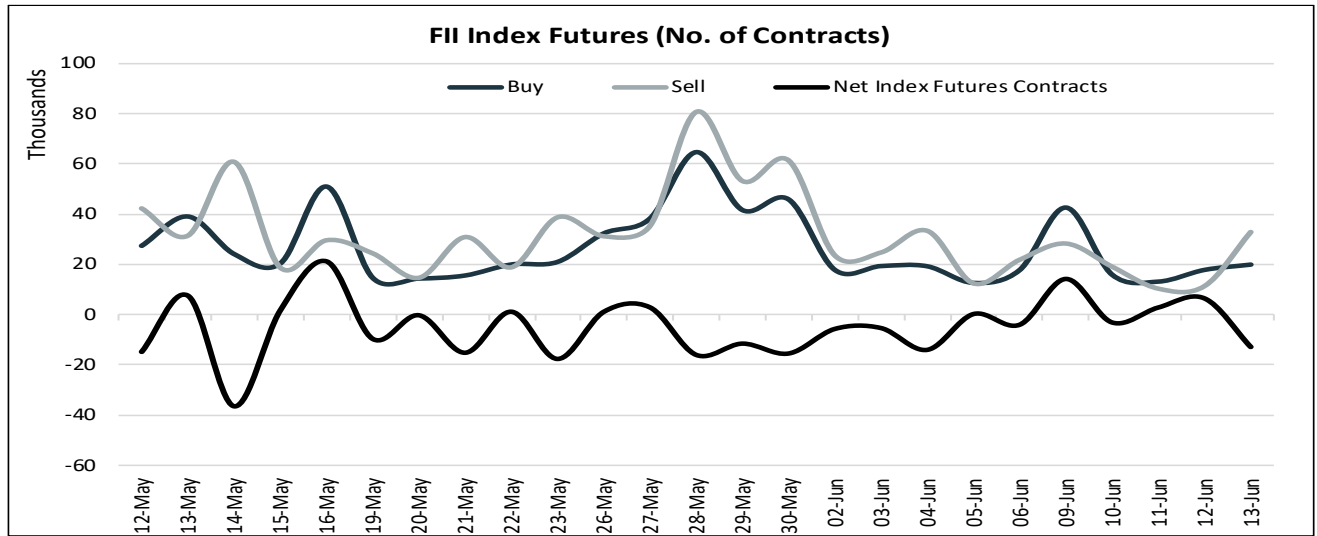
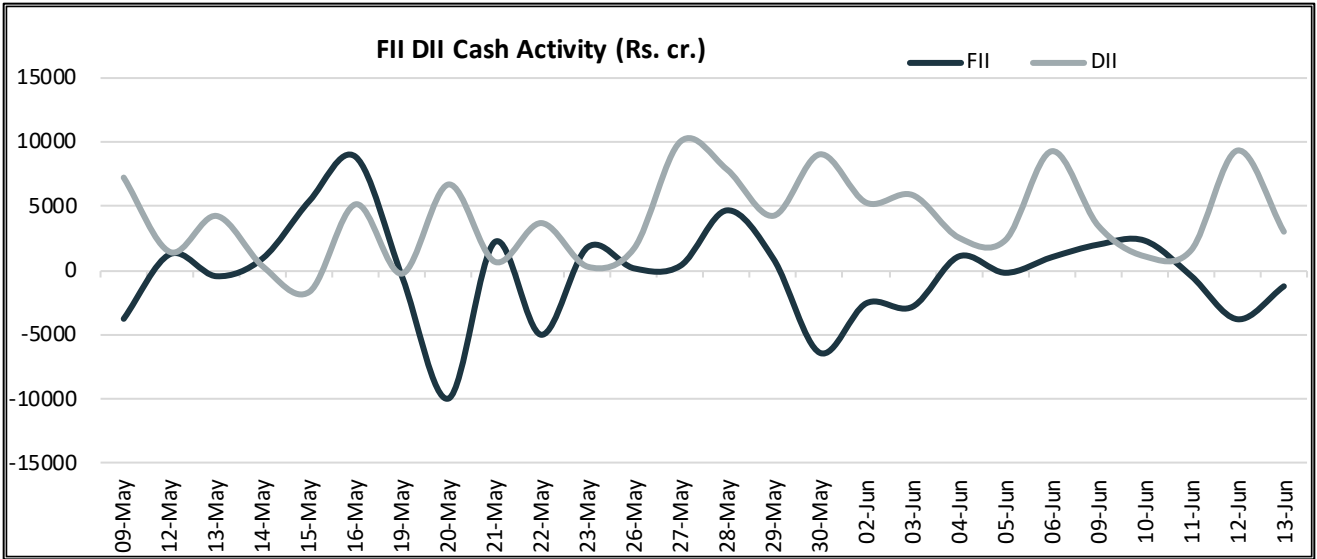
Spot Bank Nifty Index View:

- The Bank Nifty closed below the 21-day Exponential Moving Average.
 - Momentum oscillator, RSI of 14 is placed above 50 but heading south, indicating negative momentum.
 - It has broken the ascending channel support.
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- **Spot Bank Nifty: Profit Booking**
 - **Supt. 54500 Resi. 56700**



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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

78.06 lakh vs 76.63 lakh contracts

Major Changes in OI:

OI Reduction: 24900 CE & 24400 PE

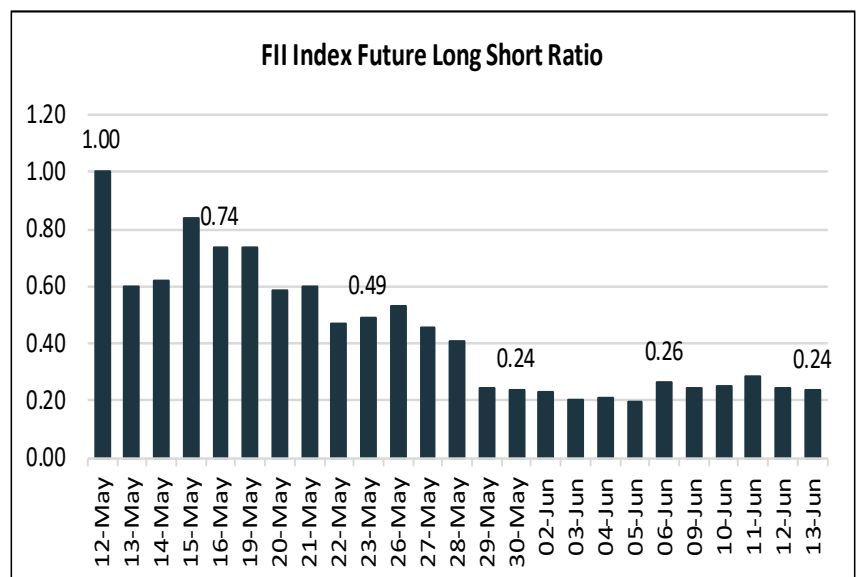
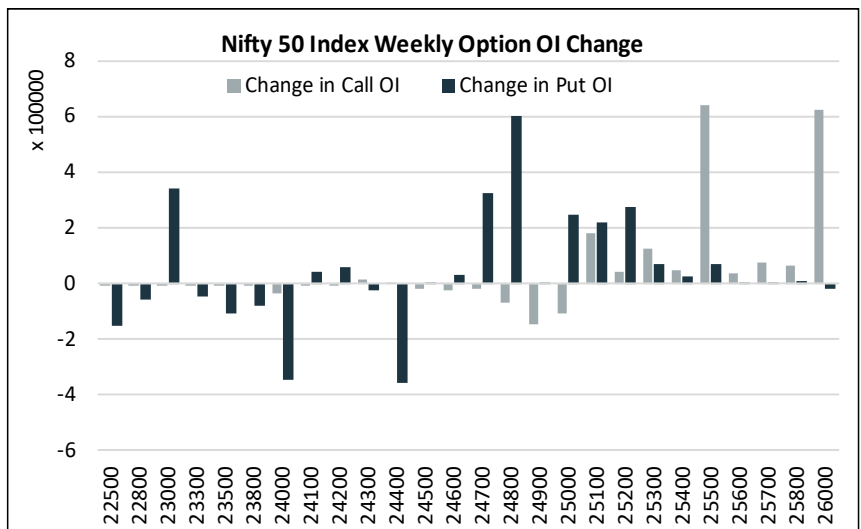
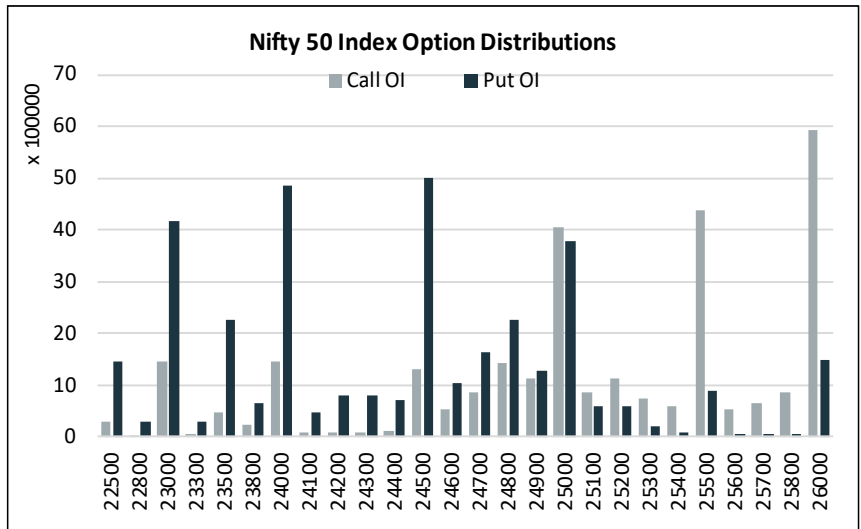
OI Addition: 25500 CE & 24800 PE

High Open Interest (Weekly):

Addition: 25500 strike

Reduction: 24000 strike

Looking at the above observations, the Nifty50 Index could find support at 24500 and resistance at 26000



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

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Economic Calendar					
Date	Country	Event	Period	Survey	Prior
16-Jun	China	New Home Prices MoM	May	--	-0.12%
	China	Retail Sales YoY	May	4.90%	5.10%
	China	Industrial Production YoY	May	6.00%	6.10%
	India	Wholesale Prices YoY	May	0.70%	0.85%
	US	Empire Manufacturing	Jun	-6.3	-9.2
	India	Trade Balance	May	-\$25000m	-\$26420m
17-Jun	US	Import Price Index MoM	May	-0.20%	0.10%
	US	Export Price Index MoM	May	-0.20%	0.10%
	US	Industrial Production MoM	May	0.00%	0.00%
	US	Capacity Utilization	May	77.70%	77.70%
	US	Manufacturing (SIC) Production	May	0.10%	-0.40%
	Japan	BOJ Target Rate	17-Jun	0.50%	0.50%
18-Jun	Japan	Trade Balance	May	-¥899.0b	-¥115.6b
	UK	CPI YoY	May	3.30%	3.50%
	UK	CPI Core YoY	May	3.50%	3.80%
	EC	ECB Current Account SA	Apr	--	50.9b
	EC	CPI YoY	May F	1.90%	2.20%
	EC	CPI Core YoY	May F	2.30%	2.30%
	US	MBA Mortgage Applications	13-Jun	--	12.50%
	US	Housing Starts	May	1359k	1361k
	US	Building Permits	May P	1425k	1422k
	US	Initial Jobless Claims	14-Jun	245k	248k
	US	Continuing Claims	07-Jun	1925k	1956k
	US	FOMC Rate Decision (Upper Bound)	18-Jun	4.50%	4.50%
19-Jun	EC	Construction Output YoY	Apr	--	-1.10%
	UK	Bank of England Bank Rate	19-Jun	4.25%	4.25%
20-Jun	Japan	Natl CPI YoY	May	3.50%	3.60%
	China	1-Year Loan Prime Rate	20-Jun	3.00%	3.00%
	China	5-Year Loan Prime Rate	20-Jun	3.50%	3.50%
	India	Eight Infrastructure Industries	May	--	0.50%
	US	Philadelphia Fed Business Outlook	Jun	-1	-4
	US	Leading Index	May	-0.10%	-1.00%
	EC	Consumer Confidence	Jun P	-14.6	-15.2
	India	Foreign Exchange Reserves	13-Jun	--	\$696.7b

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