



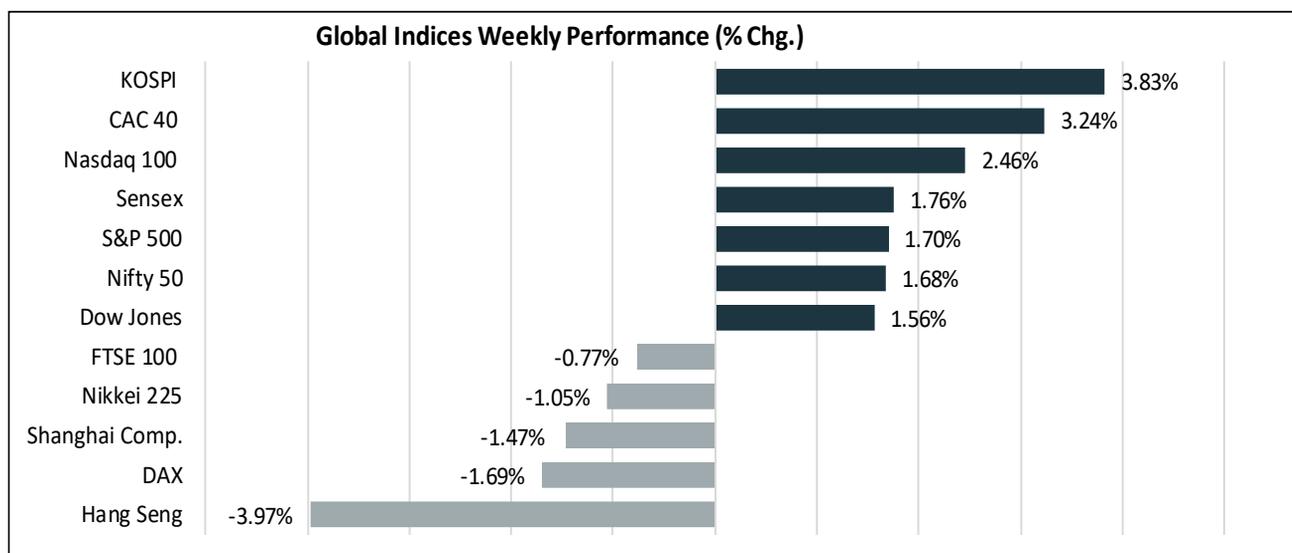
STAT EDGE

Equity Weekly Research Report

18 October 2025

Equity Weekly Research Report

Global Indices Weekly Performance



Market Summary & Outlook:

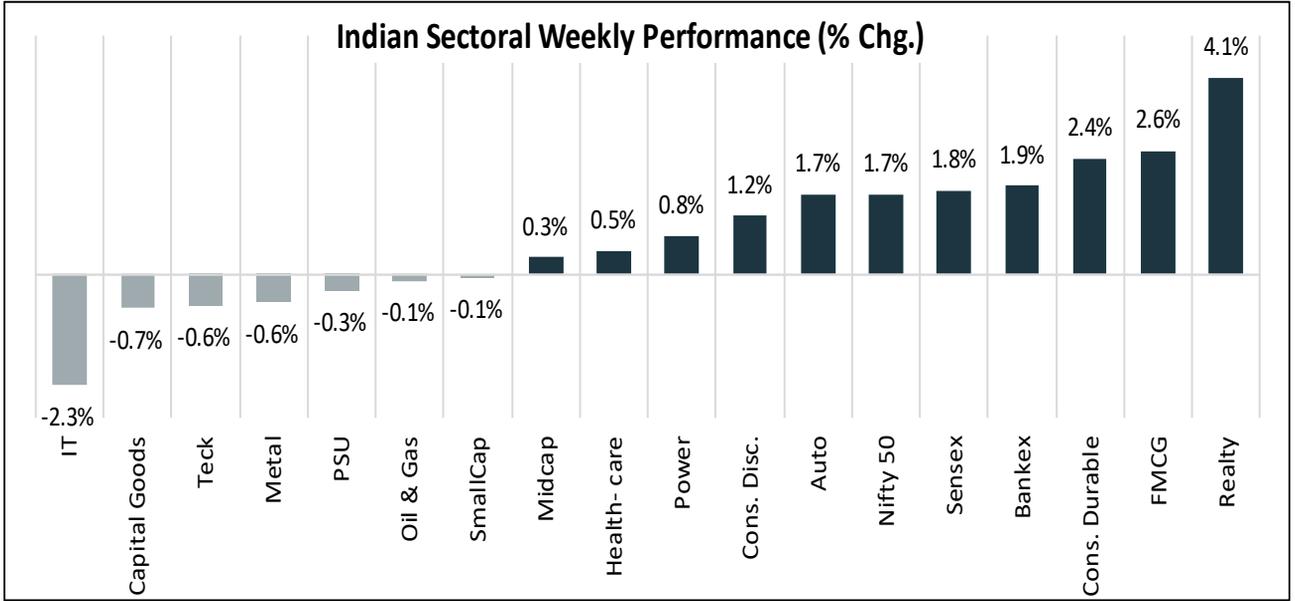
- Global equity markets delivered mixed performances over the past week, with notable divergences across regions. South Korea's KOSPI led the gains, rising 3.83%, followed closely by France's CAC 40, which advanced 3.24%, buoyed by optimism around earnings and easing geopolitical concerns. U.S. indices also posted solid returns, with the Nasdaq 100 up 2.46%, and both the S&P 500 and Sensex climbing 1.70% and 1.76% respectively. Meanwhile, India's Nifty 50 and the Dow Jones Industrial Average gained 1.68% and 1.56%, reflecting broad-based risk-on sentiment fueled by dovish signals from the Federal Reserve.
- On the downside, Hong Kong's Hang Seng Index was the week's biggest laggard, plunging 3.97%, weighed down by persistent economic uncertainty and weakness in Chinese markets. Germany's DAX also underperformed, falling 1.69%, as concerns over regional growth and industrial output lingered.
- Indian equity indices posted modest gains over the week, with the Sensex rising 1.76% and the Nifty 50 up 1.68%, supported by strong corporate earnings and sustained foreign institutional inflows. Investor sentiment was further bolstered by a decline in crude oil prices, which eased inflationary concerns and improved the outlook for India's current account balance. Additionally, optimism around festive season demand and improving GST collections added to the bullish tone, reinforcing confidence in domestic consumption and economic resilience despite global uncertainties.
- The Indian equity market witnessed sectoral divergence over the past week, with Realty emerging as the standout performer, surging 4.1%, driven by robust housing demand during the festive season and strong pre-sales figures from major developers. On the flip side, IT (-2.3%) was the worst-performing sector, weighed down by concerns over slowing global tech spending, cautious management commentary in quarterly earnings, and weakness in the U.S. dollar. Capital Goods (-0.7%), Tech (-0.6%), and Metal (-0.6%) also lagged, with profit-taking and global demand concerns dragging on performance.

Commodity Performance			
Commodity	17-Oct-25	10-Oct-25	% Change
Gold Spot \$/Oz	4251.82	4017.79	5.82%
Silver Spot \$/Oz	51.92	50.15	3.53%
WTI Crude Oil Fut	57.54	58.90	-2.31%
Currency Performance			
Currency	17-Oct-25	10-Oct-25	% Change
Dollar Index Spot	98.43	98.98	-0.55%
Euro Spot	1.1655	1.1619	0.31%
British Pound Spot	1.3427	1.336	0.50%
Japanese Yen Spot	150.61	151.19	-0.38%
Chinese Yuan Spot	7.1268	7.1453	-0.26%
USDINR	87.97	88.69	-0.81%
EURINR	102.96	102.65	0.30%
GBPINR	118.20	117.87	0.28%

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	25849	25123	25758	1.36%	222912	-7609	-3.00%	102562	43604	74%
Bank Nifty Fut	Oct-25	57920	56461	57757	1.57%	46524	-3180	-6.00%	36792	9694	36%
Index	Close	Pivot	Supt.3	Supt.2	Supt.1	Resi.1	Resi.2	Resi.3	20 DMA	50 DMA	RSI
Nifty Fut	25758	25577	24125	24851	25304	26030	26303	27028	25178	25007	66.50
Bank Nifty Fut	57757	57380	54462	55921	56839	58298	58839	60298	56025	55447	72.90

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Indian Sectoral Weekly Performance (% Chg.)



Technical Outlooks:

Spot Nifty50 Index View:

- The Nifty50 index has formed a bullish sequence of 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: Bullish**
- **Supt. 25450 Resi. 26300**



Spot Bank Nifty Index View:

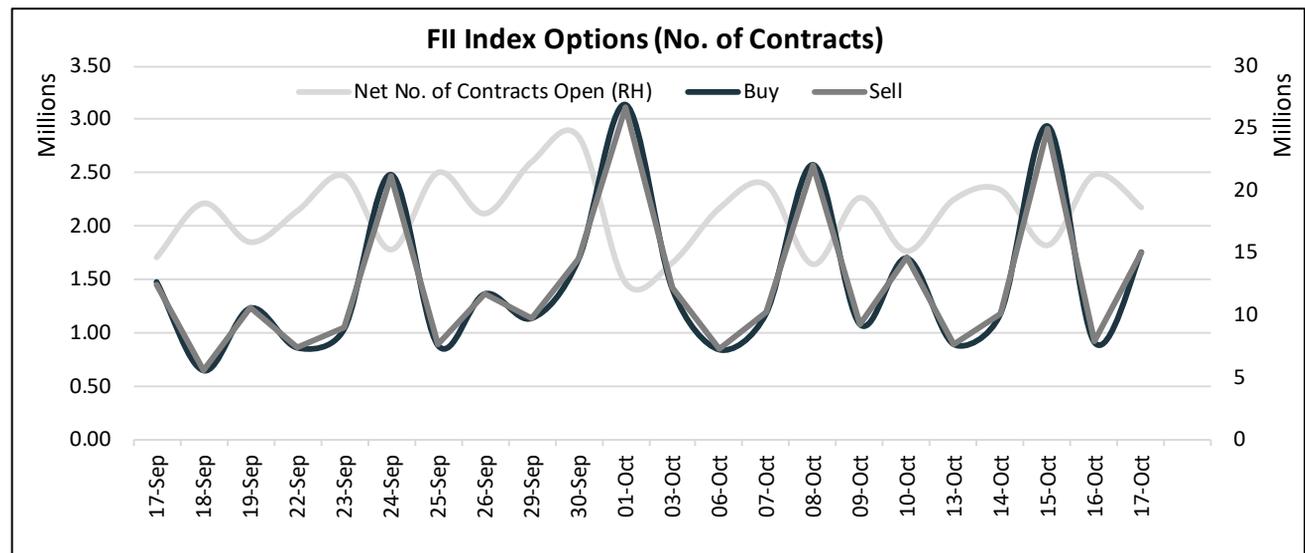
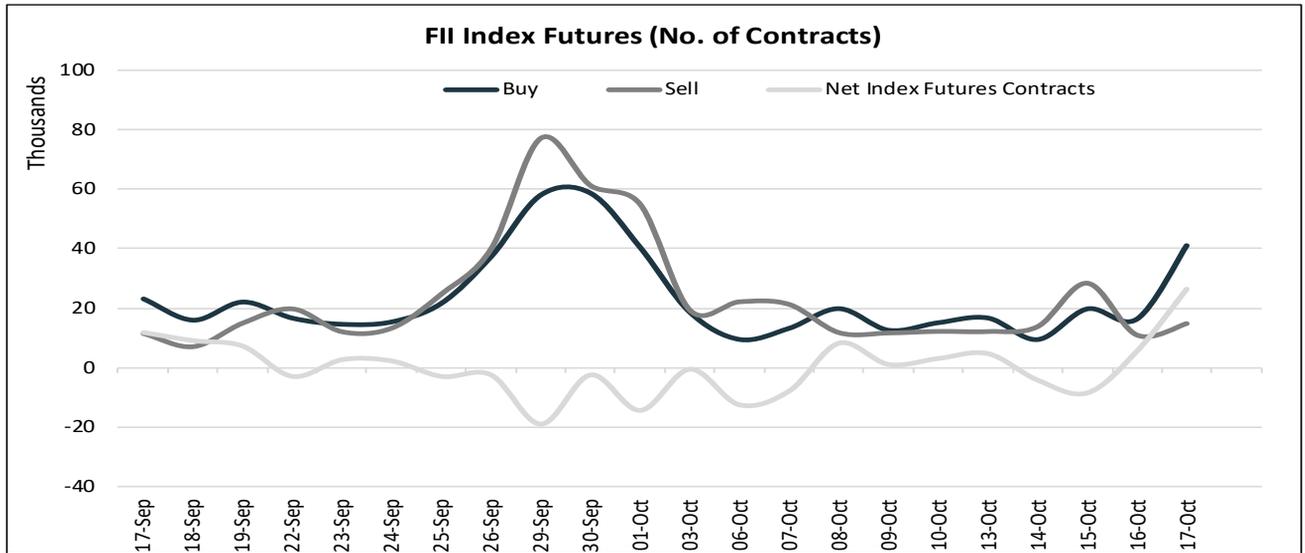
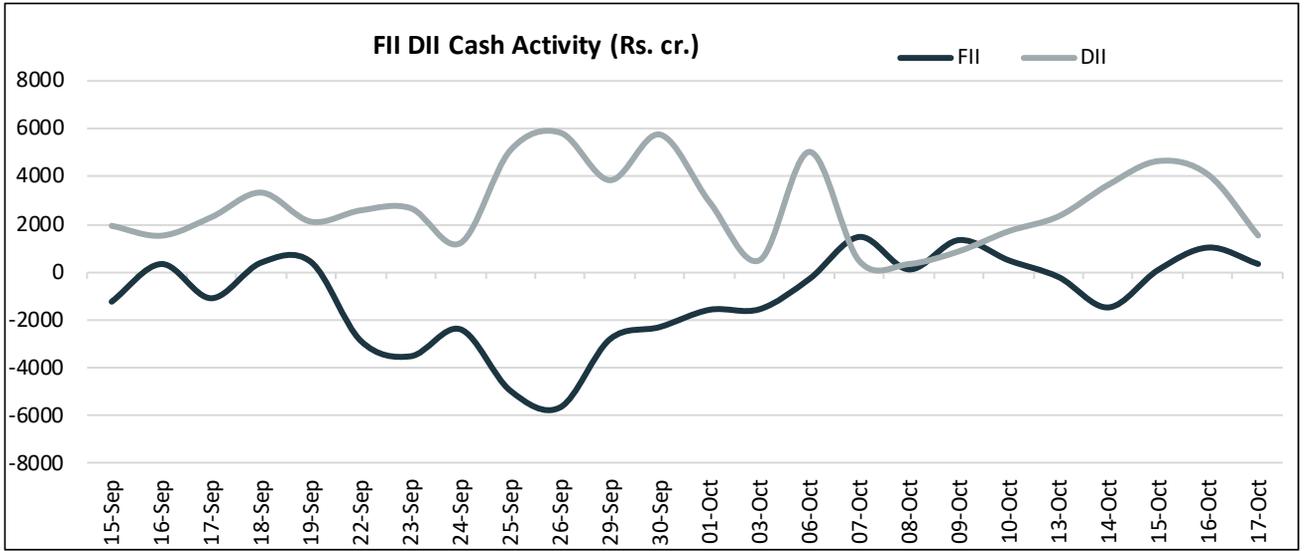
- The Bank Nifty marked a record high.
- Momentum oscillator, RSI of 14 turned up and is placed in an overbought zone.
- It has been placed well above the medium-term moving averages.

- **Spot Bank Nifty: Bullish**
- **Supt. 56450 Resi. 58700**



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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

104.4 lakh contracts

Major Changes in OI:

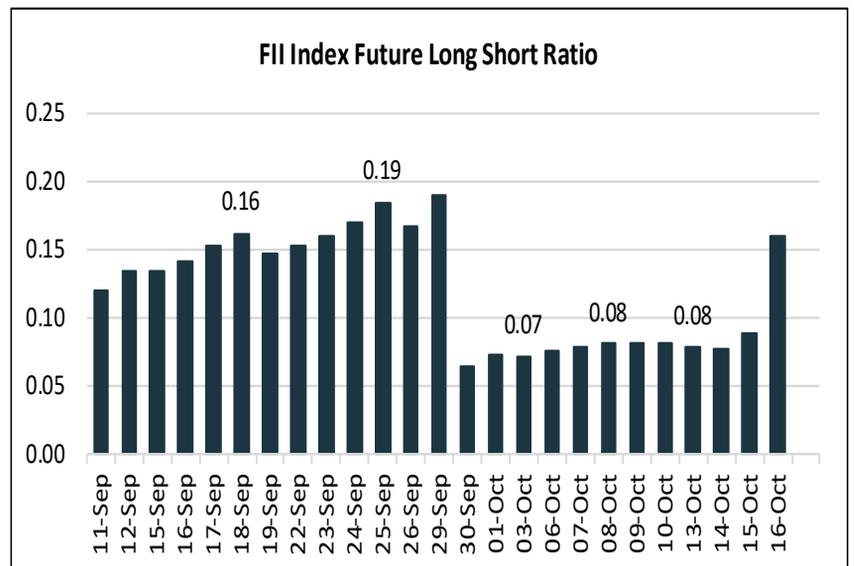
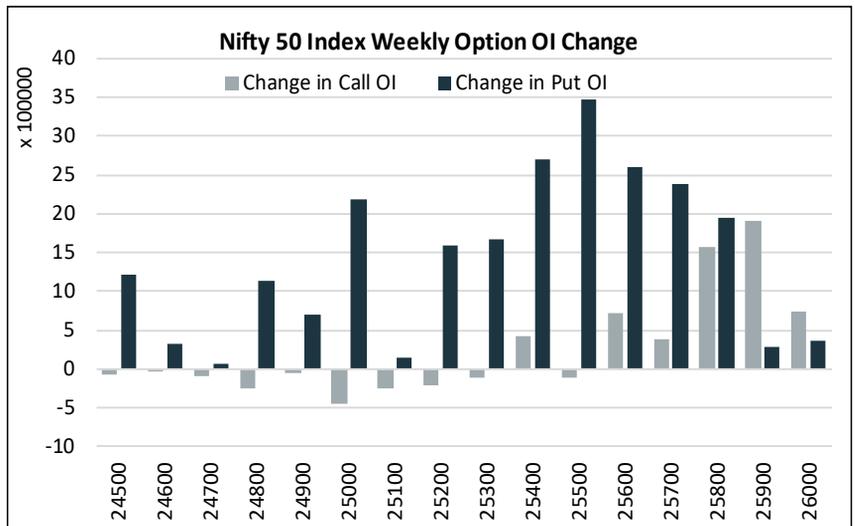
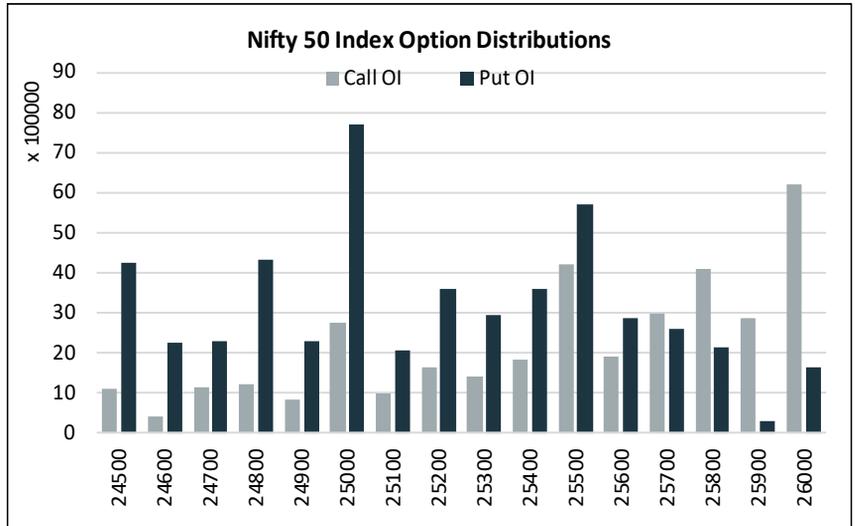
OI Addition: 26500 CE & 25500 PE

OI Reduction: 25000CE & 23000 PE

High Activity by Open Interest:

Addition: 25800 strike

Looking at the above observations, the Nifty50 Index could find support at 25000 and resistance at 26000



FII Index's future long-to-short ratio inched up from 0.08 to 0.16

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Economic Calendar					
Date	Country	Event	Period	Survey	Prior
20-Oct	China	1 & 5 -Year Loan Prime Rate	20-Oct	3.00%	3.00%
	China	New Home Prices MoM	Sep	--	-0.30%
	China	Used Home Prices MoM	Sep	--	-0.58%
	China	GDP YoY	3Q	4.70%	5.20%
	China	Retail Sales YoY	Sep	3.00%	3.40%
	China	Industrial Production YoY	Sep	5.00%	5.20%
	EC	ECB Current Account SA	Aug	--	27.7b
21-Oct	Japan	Machine Tool Orders YoY	Sep F	--	9.90%
	India	Eight Infrastructure Industries	Sep	--	6.30%
	US	Philadelphia Fed Non-Manufacturing Activity	Oct	--	-12.3
22-Oct	Japan	Trade Balance	Sep	¥30.5b	-¥242.8b
	UK	CPI YoY	Sep	4.00%	3.80%
	UK	CPI Core YoY	Sep	3.70%	3.60%
	UK	House Price Index YoY	Aug	--	2.80%
	US	MBA Mortgage Applications	17-Oct	--	-1.80%
23-Oct	US	Initial Jobless Claims	18-Oct	226k	--
	US	Continuing Claims	11-Oct	--	--
	EC	Consumer Confidence	Oct P	-15	-14.9
	US	Existing Home Sales	Sep	4.06m	4.00m
	US	Kansas City Fed Manf. Activity	Oct	--	4
24-Oct	Japan	S&P Global Japan PMI Composite	Oct P	--	51.3
	India	HSBC India PMI Composite	Oct P	--	61.00
	EC	HCOB Eurozone Composite PMI	Oct P	51	51.20
	UK	S&P Global UK Composite PMI	Oct P	50.7	50.1
	US	CPI YoY	Sep	3.10%	2.90%
	US	Core CPI YoY	Sep	3.10%	3.10%
	US	S&P Global US Composite PMI	Oct P	53.5	53.9
	US	New Home Sales	Sep	707k	800k
	US	U. of Mich. Sentiment	Oct F	55	55
	US	Kansas City Fed Services Activity	Oct	--	-9

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