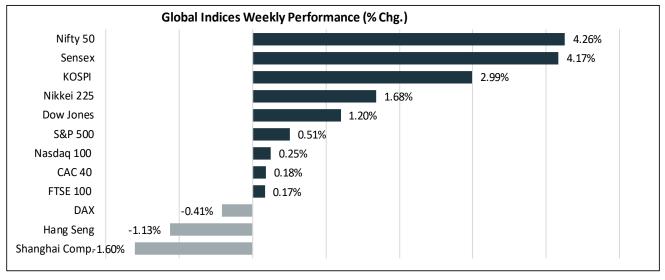


22 March 2025

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Global Indices Weekly Performance



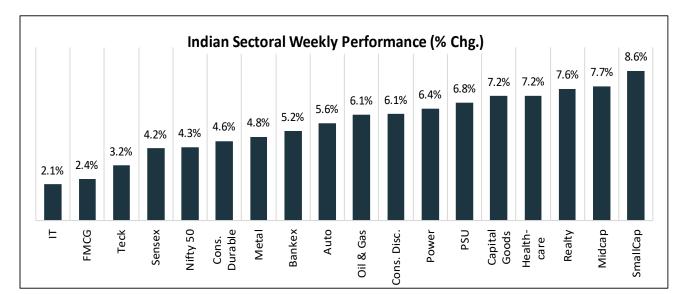
Market Summary & Outlook:

Indian equities emerged as the standout performers among major global markets last week, with several stocks gaining more than 4%. This surge was driven by renewed buying interest from foreign institutional investors, who took advantage of low prices as an opportunity to cover their shorts. The positive momentum in the Indian market was a stark contrast to the Chinese market, which saw profit booking after a strong rally earlier in the year. Investors in China cashed in on gains after a robust performance since the start of 2025, leading to a pullback in Chinese equities. In contrast, India's market strength highlighted its resilience amid global volatility.

Commodity Performance							
Commodity	21-Mar-25	14-Mar-25	% Change				
Gold Spot \$/Oz	3022.15	2984.16	1.27%				
Silver Spot \$/Oz	33.03	33.80	-2.27%				
WTI Crude Oil Mar25	68.28	66.91	2.05%				
Currency Performance							
Currency	21-Mar-25	14-Mar-25	% Change				
Dollar Index Spot	104.09	103.72	0.36%				
Euro Spot	1.0818	1.0879	-0.56%				
British Pound Spot	1.2919	1.2935	-0.12%				
Japanese Yen Spot	149.32	148.64	0.46%				
Chinese Yuan Spot	7.2571	7.2379	0.27%				
USDINR	85.98	87.01	-1.18%				
EURINR	93.087	94.6588	-1.66%				
GBPINR	111.20	112.49	-1.14%				

- The market breadth remained favourable, with mid-cap and small-cap stocks leading the charge, outperforming their large-cap counterparts. This broad-based rally reflects investor optimism across various sectors, with smaller companies benefiting the most from the positive momentum in the market. All major sectoral indices ended the week with positive returns with the Realty sector posting the best gains, while the IT sector saw modest gains.
- The US market managed to defy the prevailing downward trend following a recent sell-off, demonstrating signs of resilience and recovery. The panic that had gripped stock markets in the first half of March has given way to a reprieve over the past week. This shift in sentiment came after Fed Chair Jerome Powell downplayed growth concerns, attributing them to "noisy" soft data, such as consumer confidence reports. Powell reassured markets by stating that his baseline expectation is for tariffs to have only a "transitory" impact on inflation. Investors interpreted his comments as a signal that the Federal Reserve would step in with support, effectively offering a "Fed put" if needed, helping to ease fears and bolster market confidence. Despite the reassurances from Powell, uncertainty surrounding trade policies continues to pose a risk to market stability.

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	27-Mar-25	23438	22502	23380	4.17%	191374	-42825	-18.00%	89048	23258	35%
Bank Nifty Fut	27-Mar-25	50630	48241	50594	5.05%	83048	-17504	-17.00%	44481	9883	29%
Index	Close	Pivot	Supt.3	Supt.2	Supt.1	Resi.1	Resi.2	Resi.3	20 DMA	50 DMA	RSI
Nifty Fut	23380	23107	21235	22171	22775	23711	24042	24978	22652	23031	65.10
Bank Nifty Fut	50594	49822	45044	47433	49013	51402	52211	54599	48877	49160	67.70



Technical Outlooks:

Spot Nifty50 Index View:

- The Nifty 50 has given an upward breakout to a falling channel indicating a trend reversal.
- The RSI entered in the overbought zone indicating strengthening of the momentum.
- The Index has resistance in the area of 23520 and 23800.
- Spot Nifty50 Index: Buy at 23100 SL 22760 Target 23600

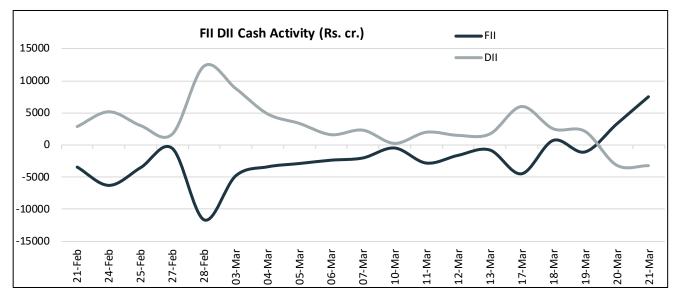
Spot Bank Nifty Index View:

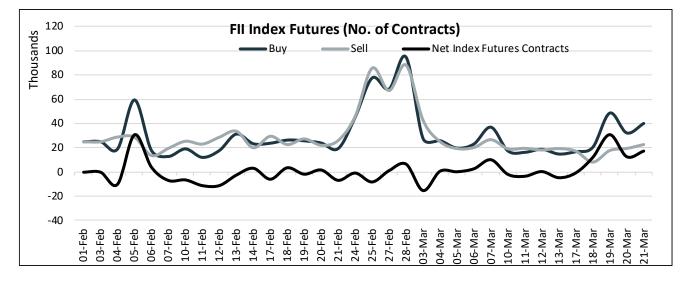
- The Bank Nifty has given a box breakout on the daily chart.
- Short-term moving average has crossed the medium-term moving average.
- It has been trading above 100 DSMA.
- Momentum oscillator, RSI of 14day entered in the overbought zone indicating positive momentum going ahead.
- Spot Bank Nifty: Buy above 50700 SL 50000 Target 51500

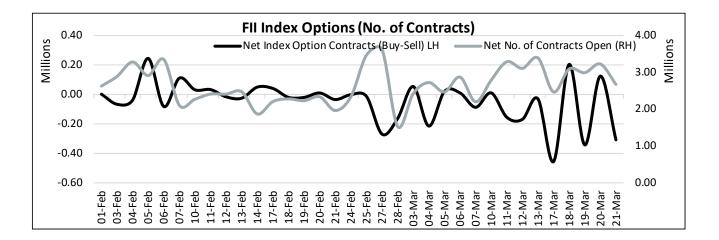




Institutional Activities





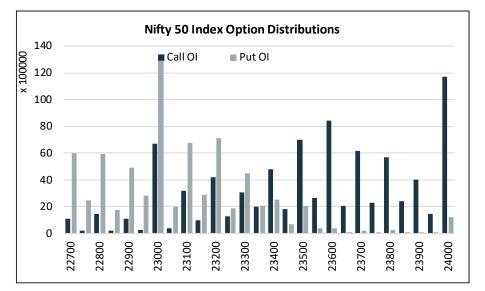


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Nifty50 Index Near Month Option Distribution Analysis:

The highest open position has been seen on 23000 Strikes

OI Positions: Highest: 23000 strikes 196.2 lakh contracts

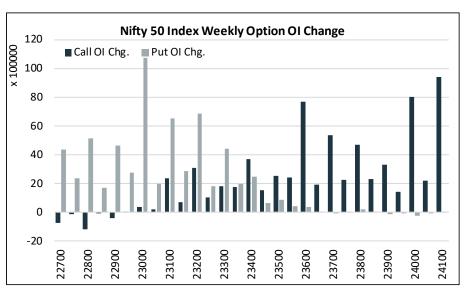


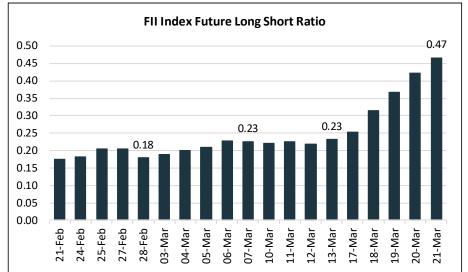
Major Changes in OI:

OI Reduction: 23500CE and 24500PE

OI Addition: 24100CE & 23000PE High OI at addition 23000 and reduction at 26000

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 moved up from 0.23 to 0.47

Japan Jibun Bank Japan PMI Mfg Mar P -48 Japan Jibun Bank Japan PMI Services Mar P 53.3 India HSBC India PMI Services Mar P 55.3 India HSBC Cindia PMI Services Mar P 55.3 EC HCOB Eurozone Services PMI Mar P 48.2 47.0 UK S&P Ciobal UK Manufacturing PMI Mar P 47.2 46.6 UK S&P Ciobal UK Manufacturing PMI Mar P 51.3 50.0 US Schicago Fed Nat Activity Index Feb -0.17 -0.06 US SAP Ciobal US Services PMI Mar P 51.3 50.0 US Schicago Fed Nat Activity Index Feb -0.13 -0.06 US Schicago Fed Nat Activity Index Feb -0.17 -0.06 US Schicado Tomes Ales Feb 680.6 6677 US New Home Sales Feb 680.6 6677 US New Home Sales Feb <			Economic Calendar			
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27-Mar US Personal Consumption 4Q T 4.20% 4.20% 27-Mar US Core PCE Price Index QoQ 4Q T 2.70% 2.70% US Advance Goods Trade Balance Feb -\$135.5b -\$155.6c US Initial Jobless Claims 22-Mar 225k 2231 US Continuing Claims 15-Mar 1879k 18924 US Pending Home Sales MoM Feb 1.00% -4.60% US Kansas City Fed Manf. Activity Mar -5 UK GDP QoQ 4Q F 0.10% 0.10% UK GDP QoQ 4Q F 0.10% 0.10% UK GDP QoQ 4Q F 1.40% 1.40% UK GDP QoQ 4Q F -14.5 1.81% UK GDP YOY 4Q F - 14.5 UK GDP YOY 4Q F - 14.5 UK GDP YOY 4Q F - 14.5 UK GDP YOY </td <td></td> <td>US</td> <td>GDP Annualized QoQ</td> <td>4Q T</td> <td>2.30%</td> <td>2.30%</td>		US	GDP Annualized QoQ	4Q T	2.30%	2.30%
27-Mar US Core PCE Price Index QoQ 4Q T 2.70% 2.70% US Advance Goods Trade Balance Feb -\$135.5b -\$155.6c US Initial Jobless Claims 22-Mar 225k 223l US Continuing Claims 15-Mar 1879k 1892l US Continuing Claims 15-Mar 1879k 1892l US Pending Home Sales MoM Feb 1.00% -4.60% US Kansas City Fed Manf. Activity Mar UK GDP QoQ 4Q F 0.10% 0.10% UK GDP YoY Mar 2.80% 2.80% UK Current Account Balance Mar F 14.5 UK Current Account Balance Mar F 14.5 India		US	Wholesale Inventories MoM	Feb P	1.00%	0.80%
27-Mar US Advance Goods Trade Balance Feb -\$135.5b -\$155.6b US Initial Jobless Claims 22-Mar 225k 223k US Continuing Claims 15-Mar 1879k 1892k US Pending Home Sales MoM Feb 1.00% -4.60% US Pending Home Sales MoM Feb 1.00% -4.60% US Kansas City Fed Manf. Activity Mar -5 VIK GDP QoQ 4Q F 0.10% 0.10% UK GDP QoQ 4Q F 0.10% 0.10% UK GDP YoY 4Q F 1.40% 1.40% UK Current Account Balance 4Q -24.5b -18.1t UK Current Account Balance Mar F -14.5 India Fiscal Deficit YTD INR Feb 14.60% US Personal Income Feb 0.40% 0.90% US Personal Spending Feb 0.50% 0.20%		US	Personal Consumption	4Q T	4.20%	4.20%
US Advance Goods Trade Balance Feb -\$135.5b -\$155.6t US Initial Jobless Claims 22-Mar 225k 223l US Continuing Claims 15-Mar 1879k 1892l US Pending Home Sales MoM Feb 1.00% -4.60% US Kansas City Fed Manf. Activity Mar US Kansas City Fed Manf. Activity Mar UK GDP QoQ 4Q F 0.10% 0.10% UK GDP YoY Mar 2.80% 2.80% UK GDP YoY Mar 2.40% 2.80% UK GDP QoQ 4Q F 0.10% 0.10% UK GDP YOY 4Q F 1.40% 1.40% UK Current Account Balance 4Q -24.5b -18.1t UK Trade Balance GBP/Mn Jan -£2816m -£2816m EC Consumer Confidence Mar F -4.60% US Personal Income	27 Mar	US	Core PCE Price Index QoQ	4Q T	2.70%	2.70%
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Z8-Mar Japan Tokyo CPI YoY Mar 2.80% 2.80% 28-Mar UK GDP QoQ 4Q F 0.10% 0.10% 28-Mar India Fiscal Deficit YTD INR Feb -14.5 1ndia Fiscal Deficit YTD INR Feb 11695t 1ndia Eight Infrastructure Industries Feb 4.60% US Personal Income Feb 0.50% -0.20% US Personal Spending Feb 0.50% -0.20% US PCE Price Index YoY Feb 2.50% 2.50% US U of Mich. Sentiment Mar F 57.9 57.5 India Foreign Exchange Reserves 21-Mar \$654.3t		US	Pending Home Sales MoM	Feb	1.00%	-4.60%
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28-MarIndiaFiscal Deficit YTD INRFeb11695t1ndiaEight Infrastructure IndustriesFeb4.60%USPersonal IncomeFeb0.40%0.90%USPersonal SpendingFeb0.50%-0.20%USPCE Price Index YoYFeb2.50%2.50%USCore PCE Price Index YoYFeb2.70%2.60%USU. of Mich. SentimentMar F57.957.5IndiaForeign Exchange Reserves21-Mar\$654.3tChinaBoP Current Account Balance4Q F\$180.7t		UK	Trade Balance GBP/Mn	Jan	-£3000m	-£2816m
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USCore PCE Price Index YoYFeb2.70%2.60%USU. of Mich. SentimentMar F57.957.9IndiaForeign Exchange Reserves21-Mar\$654.3kChinaBoP Current Account Balance4Q F\$180.7k		US	Personal Spending	Feb	0.50%	-0.20%
USU. of Mich. SentimentMar F57.957.9IndiaForeign Exchange Reserves21-Mar\$654.3bChinaBoP Current Account Balance4Q F\$180.7b		US	PCE Price Index YoY	Feb	2.50%	2.50%
IndiaForeign Exchange Reserves21-Mar\$654.3bChinaBoP Current Account Balance4Q F\$180.7b		US	Core PCE Price Index YoY	Feb	2.70%	2.60%
China BoP Current Account Balance 4Q F \$180.7b		US	U. of Mich. Sentiment	Mar F	57.9	57.9
		India	Foreign Exchange Reserves	21-Mar		\$654.3b
India Bank Credit YoY Feb 11.40%		China	BoP Current Account Balance	4Q F		\$180.7b
		India	Bank Credit YoY	Feb		11.40%

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