



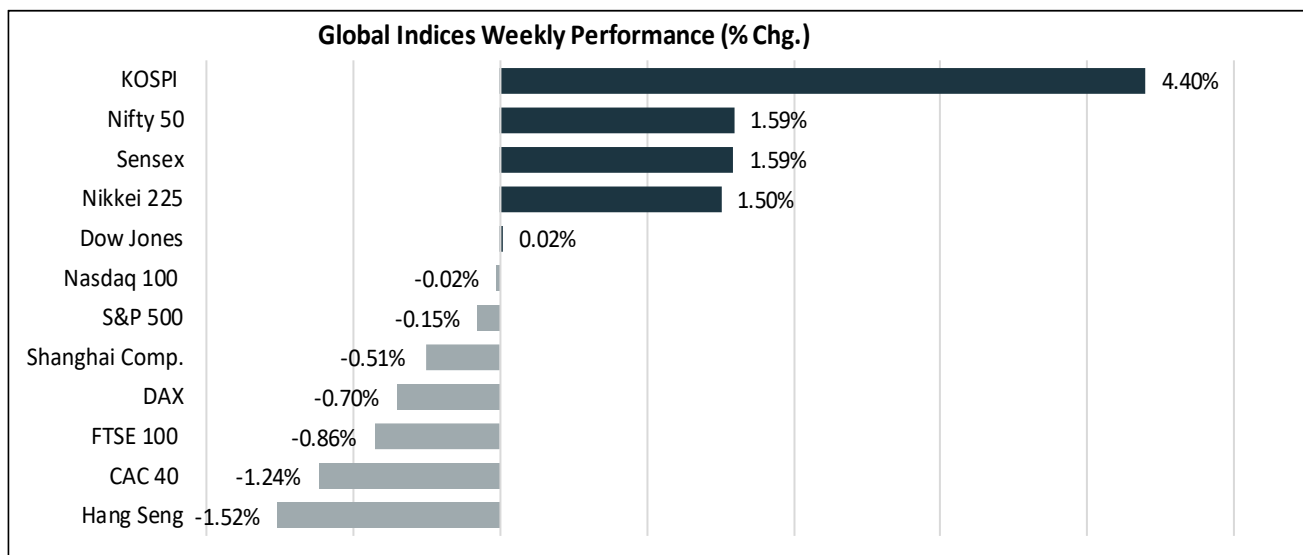
STAT EDGE

Equity Weekly Research Report

22 June 2025

Equity Weekly Research Report

Global Indices Weekly Performance



Market Summary & Outlook:

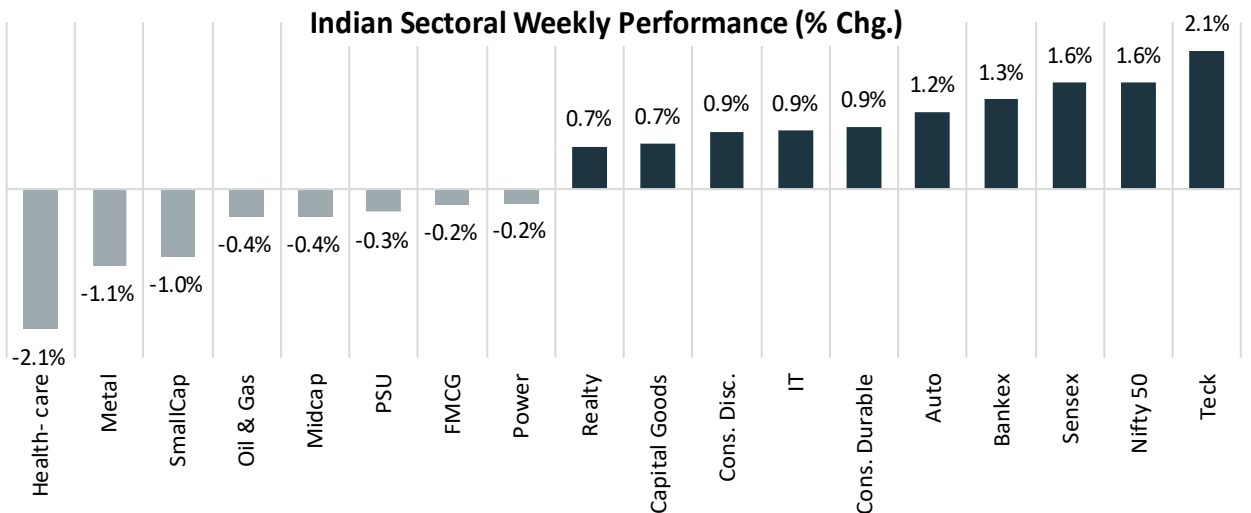
- The South Korean stock market continued to stand out on the global stage, with the KOSPI index posting another impressive weekly performance. The benchmark surged over 4%, outpacing most major international indices and reinforcing its position as a regional leader in equity gains. Robust investor sentiment, fueled by strong earnings outlooks and favourable macroeconomic data, contributed to the rally.
- European and Chinese equity markets lagged behind their global peers, settling near the bottom of the performance spectrum for the week. Both regions faced sustained pressure from persistent foreign capital outflows, as investors sought safer or more promising returns elsewhere.
- Heightened geopolitical uncertainties—ranging from regional tensions to trade policy concerns—further weighed on investor sentiment, prompting a cautious stance and dampening risk appetite across these markets.
- Meanwhile, Indian equities also delivered a strong showing, emerging as the second-best performer for the week. The Sensex recorded notable gains, supported by renewed confidence from foreign institutional investors and easing concerns over political and economic uncertainty. Positive signals from global rating agencies further bolstered sentiment, contributing to increased capital inflows and broad-based buying across key sectors. Among the various sectoral indices, the technology sector emerged as the clear frontrunner, driven by investor enthusiasm around AI-driven innovation and resilient demand for digital services. In contrast, the healthcare sector underperformed relative to its peers, weighed down by regulatory uncertainties and a rotation of investor interest away from defensive stocks toward more growth-oriented segments of the market.

Commodity Performance			
Commodity	20-Jun-25	13-Jun-25	% Change
Gold Spot \$/Oz	3368.39	3432.34	-1.86%
Silver Spot \$/Oz	36.01	36.30	-0.81%
WTI Crude Oil Mar25	73.84	71.29	3.58%
Currency Performance			
Currency	20-Jun-25	13-Jun-25	% Change
Dollar Index Spot	98.71	98.18	0.53%
Euro Spot	1.1523	1.1549	-0.23%
British Pound Spot	1.3451	1.3571	-0.88%
Japanese Yen Spot	146.09	144.07	1.40%
Chinese Yuan Spot	7.1791	7.1892	-0.14%
USDINR	86.59	86.09	0.59%
EURINR	99.807	99.2175	0.59%
GBPINR	116.85	116.59	0.22%

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	25137	24735	25112	1.55%	144720	-12952	-8.00%	105046	15048	17%
Bank Nifty Fut	Jun-25	56600	55505	56298	1.23%	58369	-6828	-10.00%	43531	3951	10%
Index	Close	Pivot	Supt.3	Supt.2	Supt.1	Resi.1	Resi.2	Resi.3	20 DMA	50 DMA	RSI
Nifty Fut	25112	24995	24191	24593	24852	25254	25397	25799	24919	24524	57.70
Bank Nifty Fut	56298	56134	53945	55040	55669	56763	57229	58323	56059	55121	56.70

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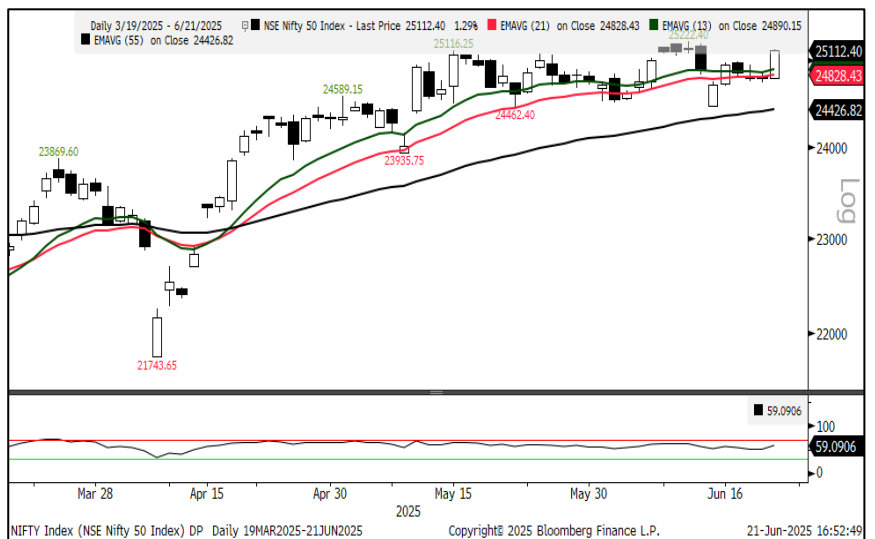
Indian Sectoral Weekly Performance (% Chg.)



Technical Outlooks:

Spot Nifty50 Index View:

- The Nifty 50 closed above the 13-day Exponential Moving Average (EMA).
- The short-term moving average is placed above the medium-term moving average.
- The RSI is heading higher, indicating a positive momentum.
- The strong bullish candle on the daily chart suggesting fresh upward momentum.
- **Nifty50 Index: Bullish**
- **Supt. 24450 Resi. 25350**



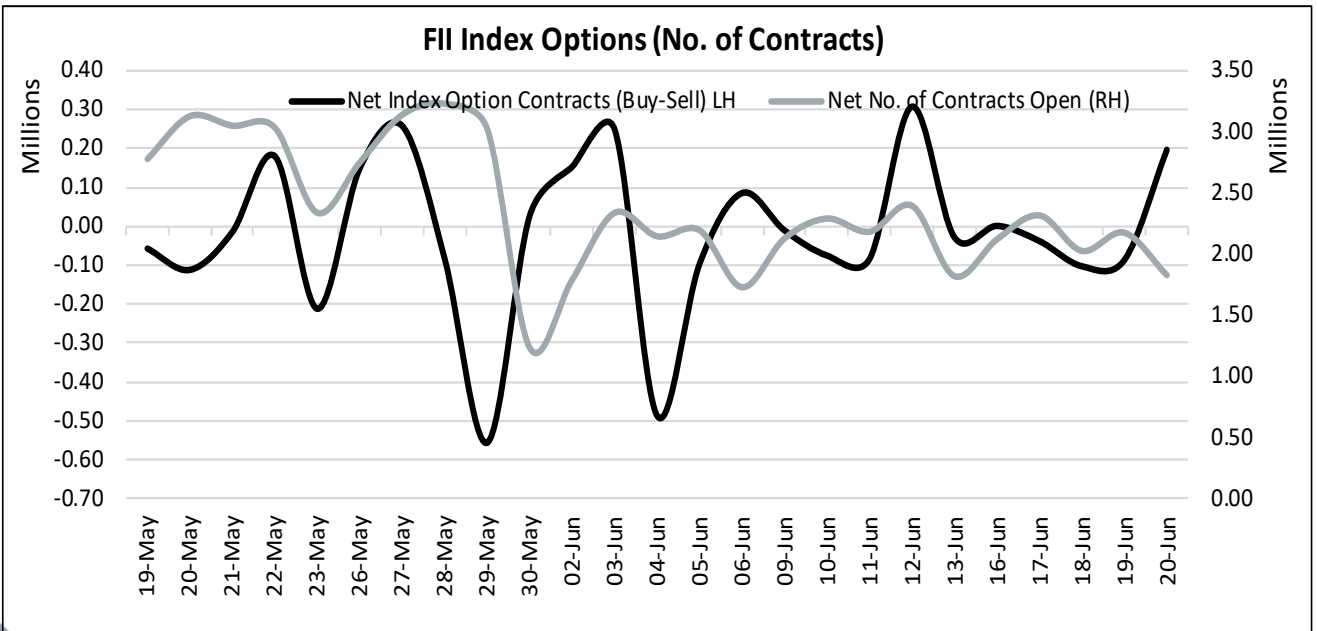
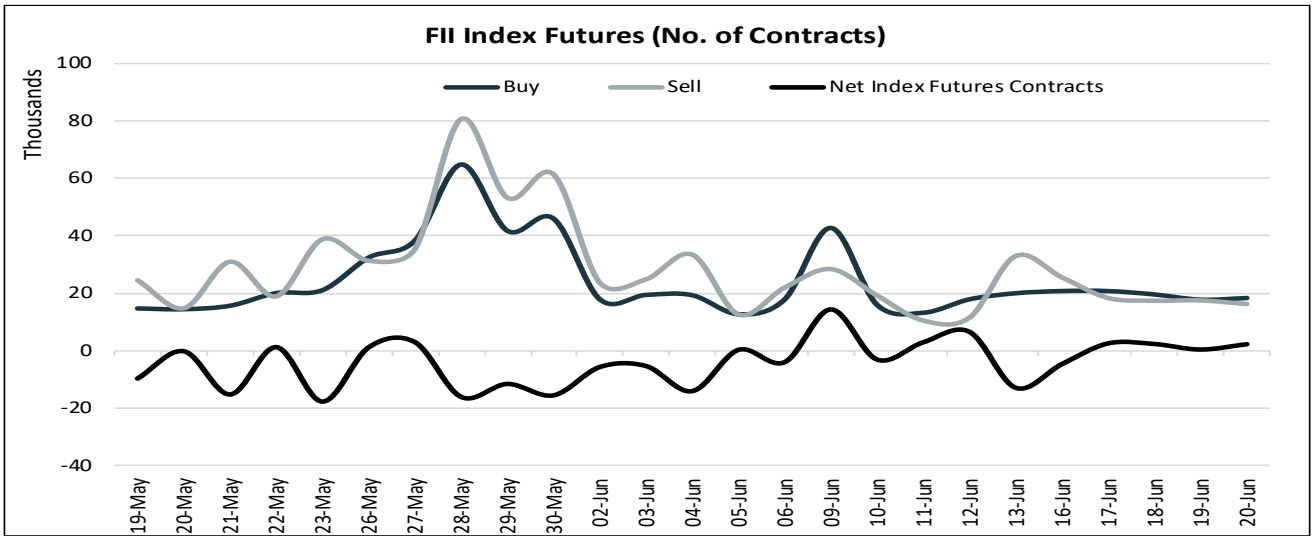
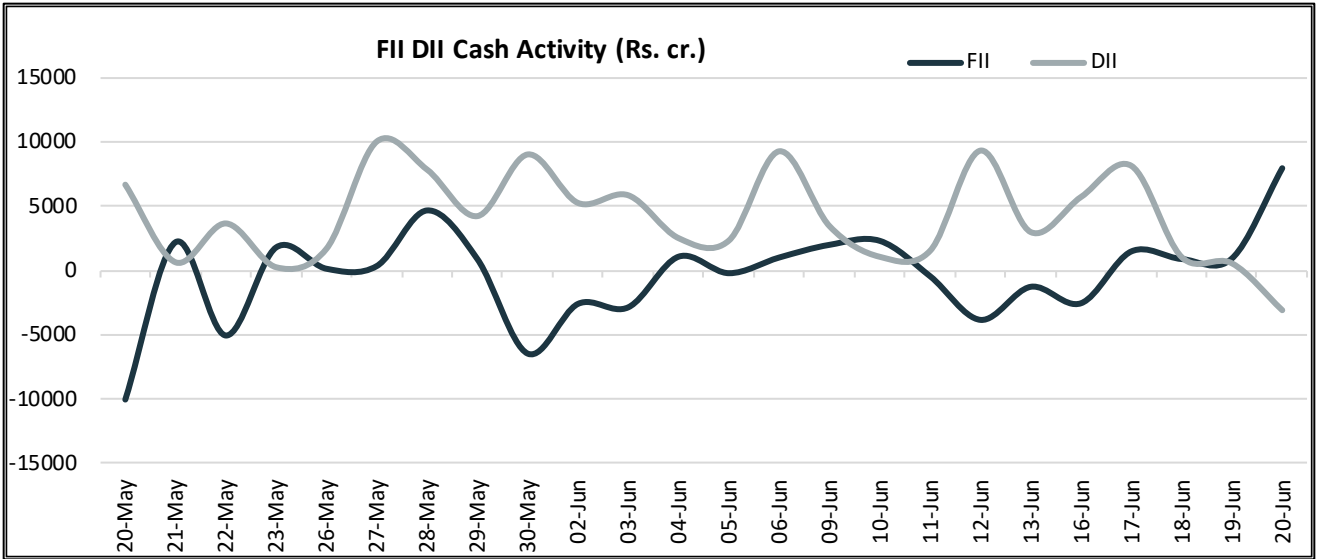
Spot Bank Nifty Index View:

- The Bank Nifty formed multiple bottom supports at 55250 on the hourly chart.
- Momentum oscillator, RSI of 14 is placed above 50 and heading north, indicating positive momentum.
- It has maintained the bullish pattern of higher highs and lows.
- **Spot Bank Nifty: Bullish**
- **Supt. 55150 Resi. 57300**



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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

179 lakh vs 100 lakh contracts

Major Changes in OI:

OI Reduction: 24600 CE & 26000 PE

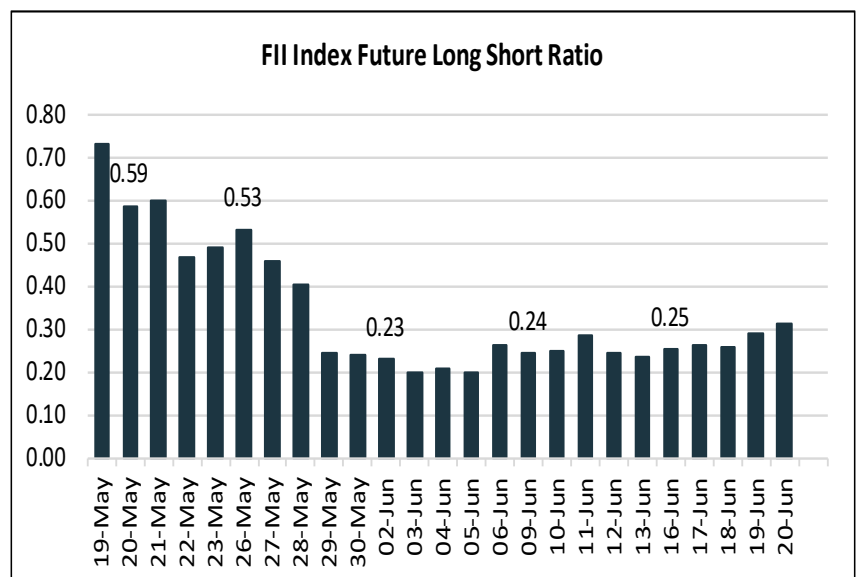
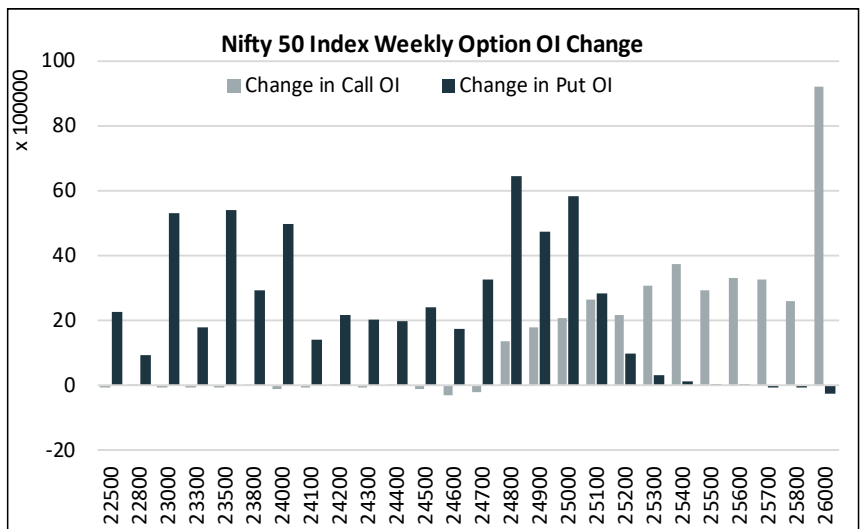
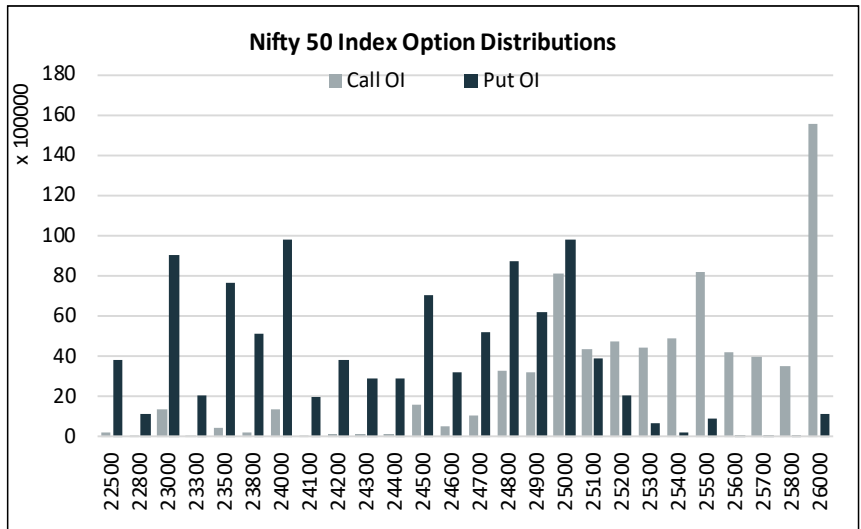
OI Addition: 26000 CE & 24800 PE

High Open Interest (Weekly):

Addition: 26000 strike

Reduction: 22350 strike

Looking at the above observations, the Nifty50 Index could find support at 24600 and resistance at 26000



FII Index's future long-to-short ratio declined to 0.31 from 0.24

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Economic Calendar					
Date	Country	Event	Period	Survey	Prior
23-Jun	Japan	Jibun Bank Japan PMI Mfg	Jun P	--	49.4
	Japan	Jibun Bank Japan PMI Services	Jun P	--	51
	India	HSBC India PMI Mfg	Jun P	--	57.6
	India	HSBC India PMI Services	Jun P	--	58.8
	EC	HCOB Eurozone Manufacturing PMI	Jun P	49.8	49.4
	EC	HCOB Eurozone Services PMI	Jun P	50	49.7
	UK	S&P Global UK Manufacturing PMI	Jun P	46.9	46.4
	UK	S&P Global UK Services PMI	Jun P	51.3	50.9
	US	S&P Global US Manufacturing PMI	Jun P	51	52
	US	S&P Global US Services PMI	Jun P	52.9	53.7
	US	Existing Home Sales	May	3.95m	4.00m
24-Jun	US	Current Account Balance	1Q	-\$445.5b	-\$303.9b
	US	FHFA House Price Index MoM	Apr	-0.10%	-0.10%
	US	Richmond Fed Manufact. Index	Jun	-10	-9
	US	Richmond Fed Business Conditions	Jun	--	-18
	US	Conf. Board Consumer Confidence	Jun	99.8	98
25-Jun	US	MBA Mortgage Applications	20-Jun	--	-2.60%
	US	New Home Sales	May	693k	743k
	US	Building Permits	May F	--	1393k
26-Jun	US	Wholesale Inventories MoM	May P	0.20%	0.20%
	US	Retail Inventories MoM	May	-0.10%	-0.10%
	US	GDP Annualized QoQ	1Q T	-0.20%	-0.20%
	US	GDP Price Index	1Q T	3.70%	3.70%
	US	Core PCE Price Index QoQ	1Q T	3.40%	3.40%
	US	Chicago Fed Nat Activity Index	May	-0.3	-0.25
	US	Durable Goods Orders	May P	8.50%	-6.30%
	US	Initial Jobless Claims	21-Jun	245k	245k
	US	Continuing Claims	14-Jun	1945k	1945k
	US	Pending Home Sales MoM	May	0.00%	-6.30%
	US	Kansas City Fed Manf. Activity	Jun	--	-3
27-Jun	Japan	Tokyo CPI YoY	Jun	3.30%	3.40%
	Japan	Retail Sales YoY	May	2.50%	3.50%
	China	Industrial Profits YoY	May	--	3.00%
	EC	Consumer Confidence	Jun F	--	-15.3
	India	Industrial Production YoY	May	2.40%	2.70%
	US	Personal Income	May	0.30%	0.80%
	US	Personal Spending	May	0.10%	0.20%
	US	PCE Price Index YoY	May	2.30%	2.10%
	US	Core PCE Price Index YoY	May	2.60%	2.50%
	US	U. of Mich. Sentiment	Jun F	60.3	60.5

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