



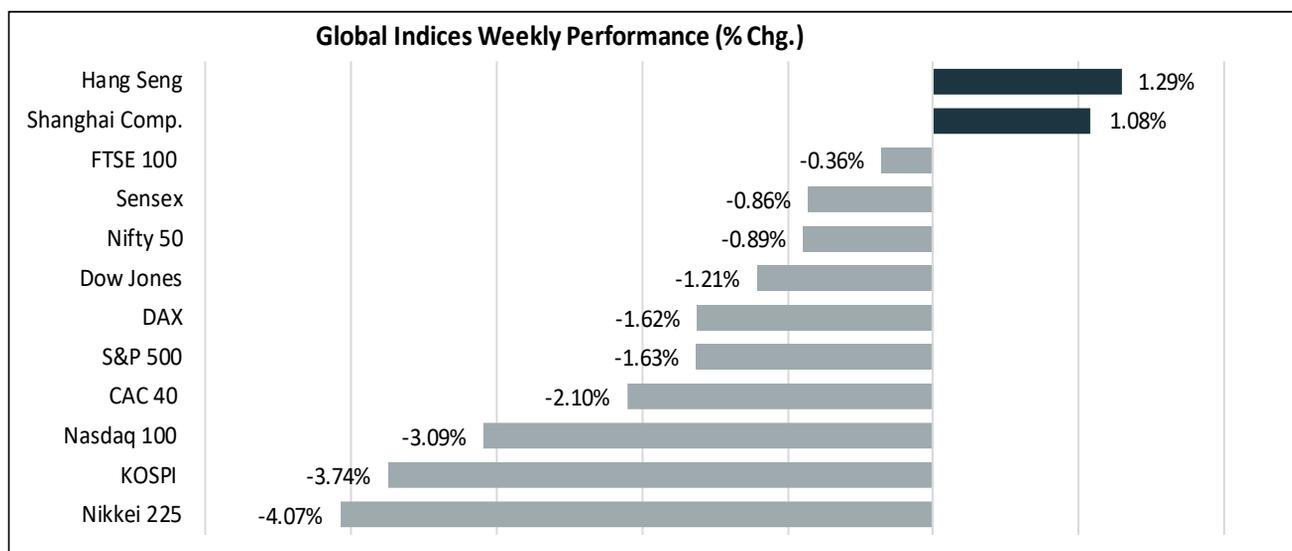
STAT EDGE

**Equity Weekly Research Report**

**8 November 2025**

# Equity Weekly Research Report

## Global Indices Weekly Performance



## Market Summary & Outlook:

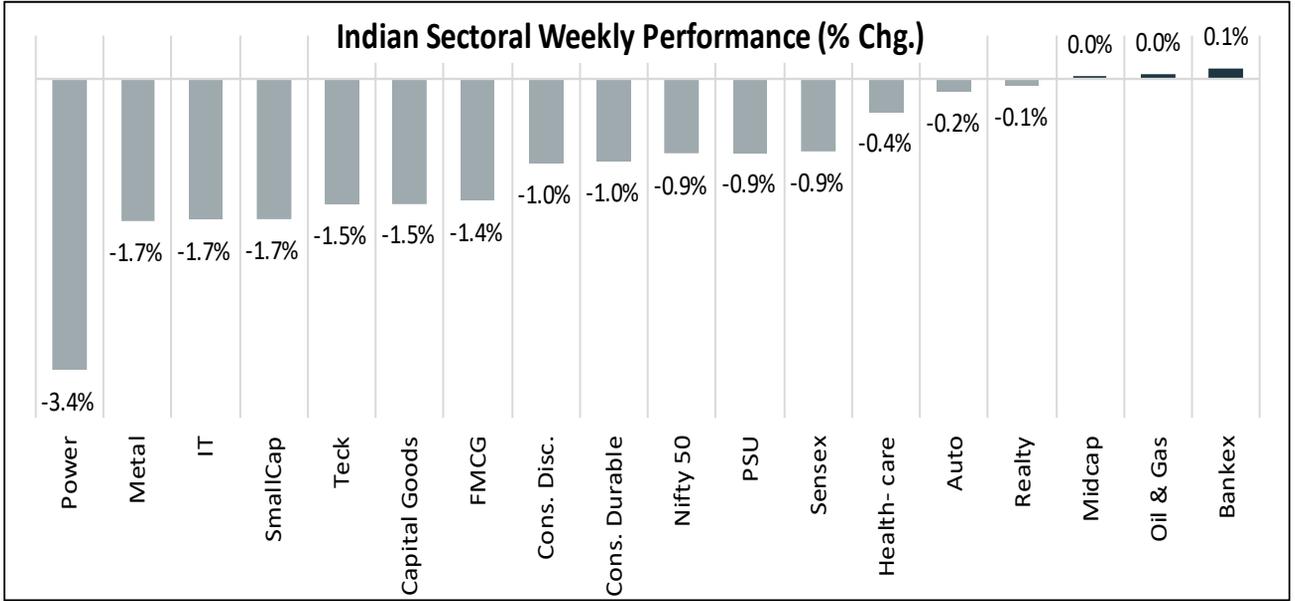
- The Hang Seng outperformed global peers, supported by buying in technology and property stocks as investors bet that policy easing in China would support corporate earnings. Market sentiment was buoyed by optimism that Beijing could roll out additional fiscal support following softer domestic inflation and credit data. Reports of state-backed funds increasing equity purchases also helped stabilise investor confidence.
- The Nikkei 225 suffered the largest drop among major indices. The index was hit by a combination of yen strength, which hurt exporters, and renewed risk aversion following weak global data and losses in Wall Street stocks. Japanese investors also grew cautious as global bond yields declined, signalling broader concerns about slowing economic growth and tightening financial conditions.
- Indian equities eased slightly after several weeks of strong performance. The pullback was driven by profit-taking and foreign outflows, following mixed earnings results from key sectors. Additionally, higher commodity prices raised concerns about inflation and fiscal pressures. However, optimism surrounding India's domestic growth outlook and resilient corporate balance sheets helped limit the downside.
- The Indian sectoral indices saw a broadly negative performance during the week, reflecting cautious investor sentiment amid weak global cues, persistent volatility amid trade uncertainties, and concerns over slowing domestic demand. The Power sector was the worst performer, plunging 3.4%, as profit-taking and higher input costs weighed on utilities after their recent strong run. The Banking index was the only gainer, inching up 0.1%, helped by optimism over stable credit growth, strong corporate results and healthy asset quality among leading private lenders.
- Investors continued to seek clarity on U.S. fiscal policy, tariff developments, and central bank actions, all of which remain key drivers of global market sentiment heading into the next trading week.

Commodity Performance			
Commodity	07-Nov-25	31-Oct-25	% Change
Gold Spot \$/Oz	4001.26	4002.92	-0.04%
Silver Spot \$/Oz	48.32	48.69	-0.75%
WTI Crude Oil Fut	59.75	60.98	-2.02%
Currency Performance			
Currency	07-Nov-25	31-Oct-25	% Change
Dollar Index Spot	99.60	99.80	-0.20%
Euro Spot	1.1566	1.1537	0.25%
British Pound Spot	1.3162	1.3152	0.08%
Japanese Yen Spot	153.42	153.99	-0.37%
Chinese Yuan Spot	7.1262	7.1225	0.05%
USDINR	88.67	88.77	-0.12%
EURINR	102.31	102.76	-0.44%
GBPINR	116.14	116.68	-0.46%

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	Nov-25	25943	25428	25589	-1.22%	247300	21937	10.00%	92173	4203	5%
Bank Nifty Fut	Nov-25	58499	57450	58182	-0.01%	51917	3590	7.00%	35200	12246	53%
Index	Close	Pivot	Supt.3	Supt.2	Supt.1	Resi.1	Resi.2	Resi.3	20 DMA	50 DMA	RSI
Nifty Fut	25589	25653	24624	25139	25364	25879	26168	26682	25730	25290	49.40
Bank Nifty Fut	58182	58044	55947	56995	57588	58637	59092	60141	57765	56125	60.90

# Equity Weekly Research Report

## Indian Sectoral Weekly Performance (% Chg.)



### Technical Outlooks:

#### Spot Nifty50 Index View:

- The Nifty 50 has transitioned from an uptrend to sideways/corrective movement, with institutional momentum lost after profit-taking from the October highs.
- The trend is now mixed, with price recently moving below the 13- and 21-day EMAs
- RSI is at 49.1, indicating neutral momentum and reflecting the consolidation phase.
- **Nifty50 Index: Mixed**
- **Supt. 25150 Resi. 25650**



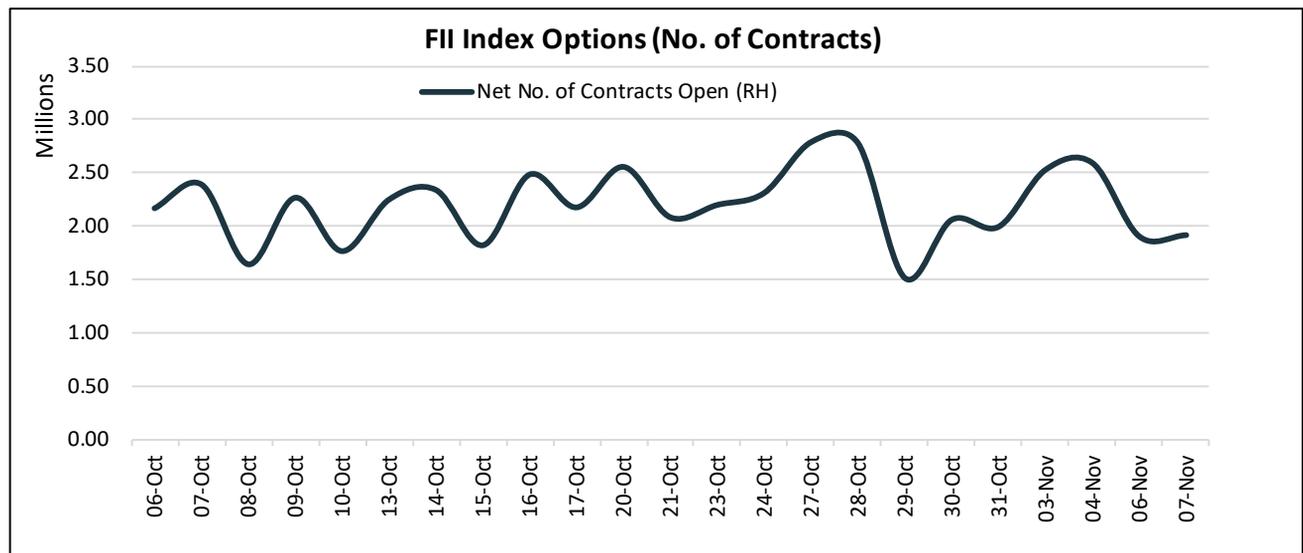
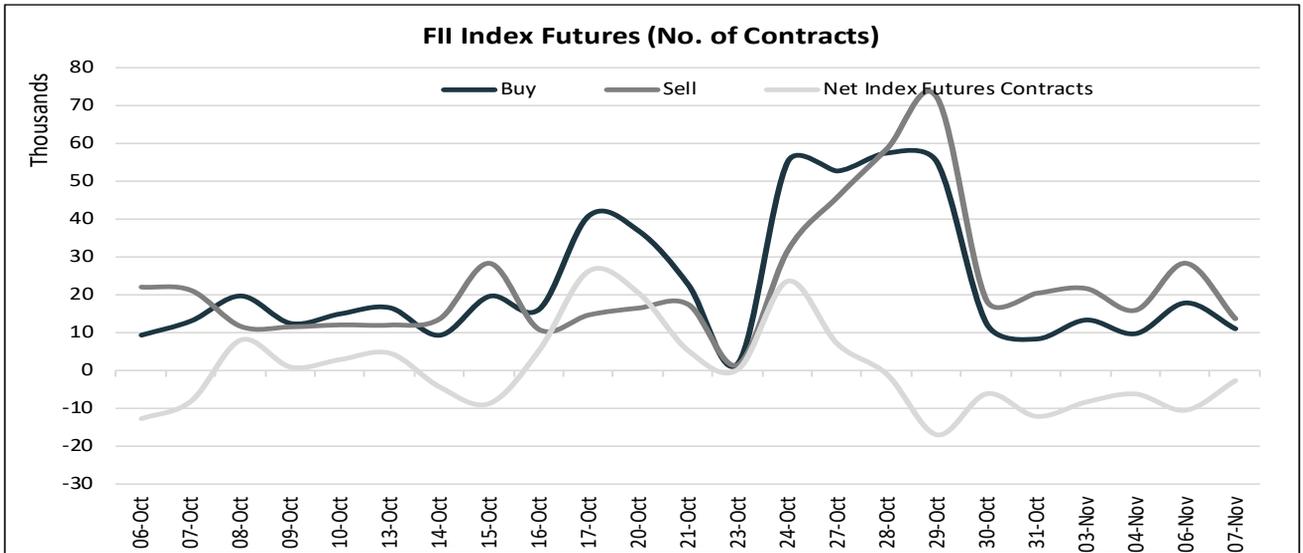
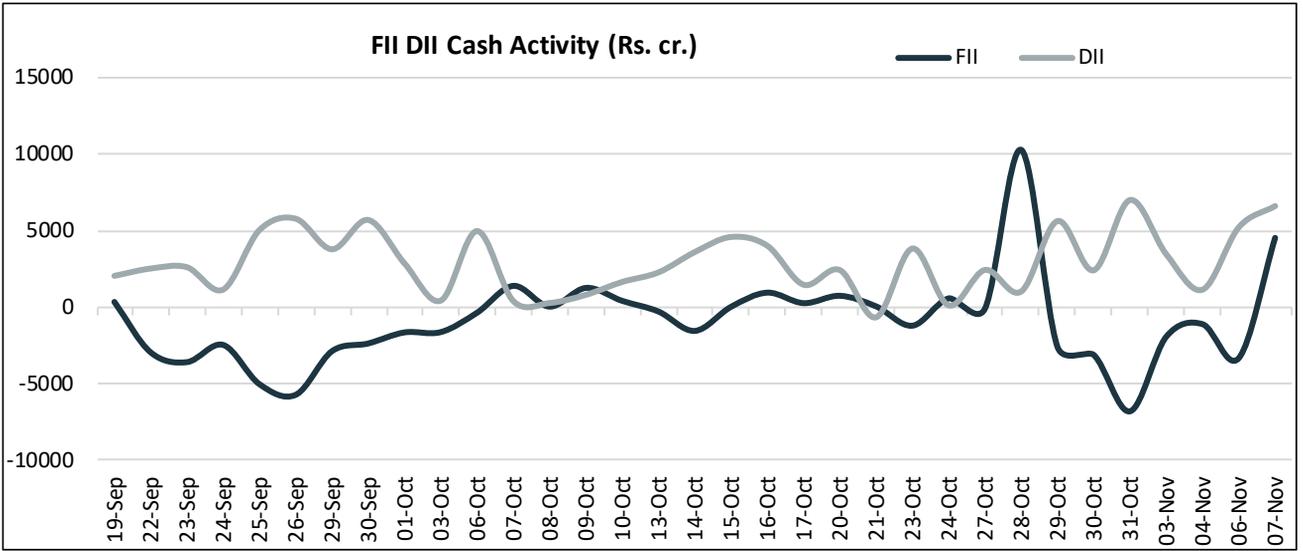
#### Spot Bank Nifty Index View:

- The Nifty Bank Index is in a bullish but corrective phase, with recent price action testing moving average supports after a sharp rally
- The price action remains above the 55-day EMA, supporting a broader bullish context.
- The RSI sits at 60, above neutral, indicating fading bullish momentum yet not entering negative territory.
- **Spot Bank Nifty: Bullish**
- **Supt. 56500 Resi. 57800**



# Equity Weekly Research Report

## 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

113.5 lakh contracts

### Major Changes in OI:

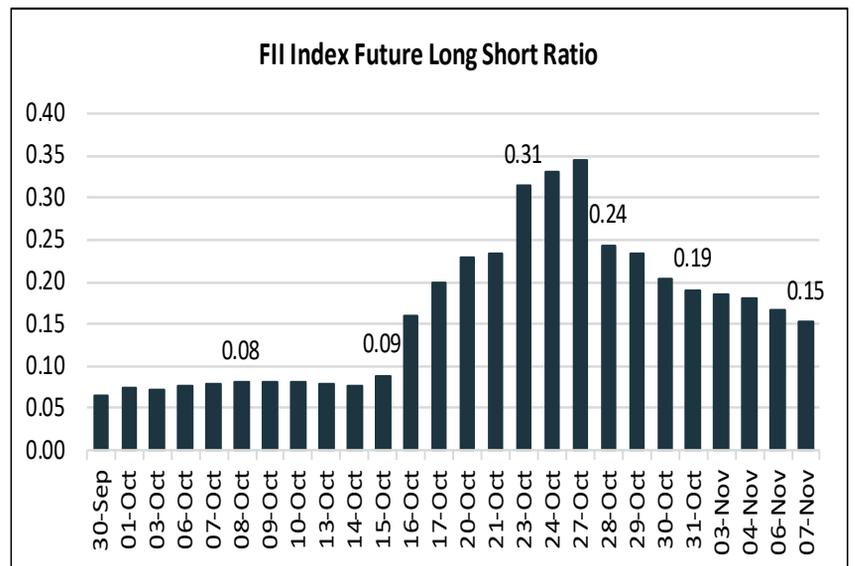
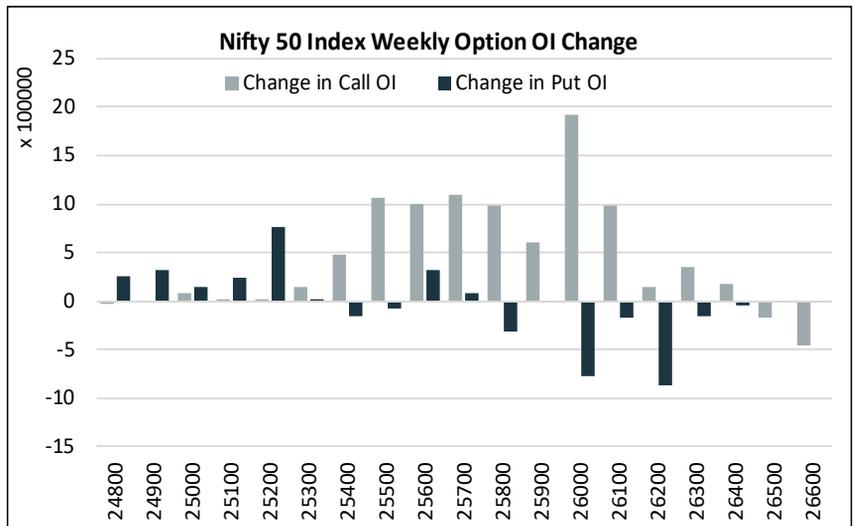
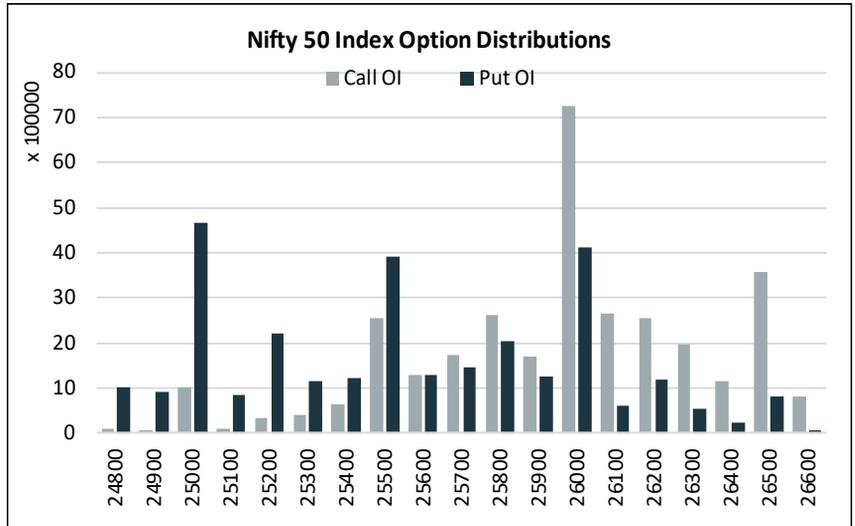
OI Addition: 26000 CE & 25200 PE

OI Reduction: 26600CE & 26200 PE

High Activity by Open Interest:

Addition: 25600 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 declined from 0.19 to 0.15

# Equity Weekly Research Report

Economic Calendar					
Date	Country	Event	Period	Survey	Prior
11-Nov	Japan	BoP Current Account Balance	Sep	¥2456.6b	¥3775.8b
	UK	Weekly Earnings ex Bonus 3M/YoY	Sep	4.60%	4.70%
	UK	Claimant Count Rate	Oct	--	4.40%
	UK	Jobless Claims Change	Oct	--	25.8k
	EC	ZEW Survey Expectations	Nov	--	22.7
	US	NFIB Small Business Optimism	Oct	98.5	98.8
12-Nov	India	CPI YoY	Oct	0.40%	1.54%
	US	MBA Mortgage Applications	07-Nov	--	-1.90%
13-Nov	Japan	PPI YoY	Oct	2.50%	2.70%
	UK	GDP YoY	3Q P	1.40%	1.40%
	UK	Industrial Production MoM	Sep	-0.20%	0.40%
	UK	Manufacturing Production MoM	Sep	-0.40%	0.70%
	UK	Trade Balance GBP/Mn	Sep	-£3100m	-£3386m
	EC	Industrial Production SA MoM	Sep	0.80%	-1.20%
	US	Initial Jobless Claims	08-Nov	225k	--
	US	CPI MoM	Oct	0.20%	0.30%
	US	Continuing Claims	01-Nov	--	--
14-Nov	China	Retail Sales YoY	Oct	2.80%	3.00%
	China	Industrial Production YoY	Oct	5.50%	6.50%
	Japan	Tertiary Industry Index MoM	Sep	0.20%	-0.40%
	India	Wholesale Prices YoY	Oct	-0.70%	0.13%
	EC	GDP SA YoY	3Q S	1.30%	1.30%
	EC	Trade Balance SA	Sep	--	9.7b
	US	Retail Sales Advance MoM	Oct	-0.20%	--
	US	Business Inventories	Sep	0.20%	--
	India	Exports YoY	Oct	--	6.70%
	India	Imports YoY	Oct	--	16.70%
	India	Trade Balance	Oct	-\$30000m	-\$32150m

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