



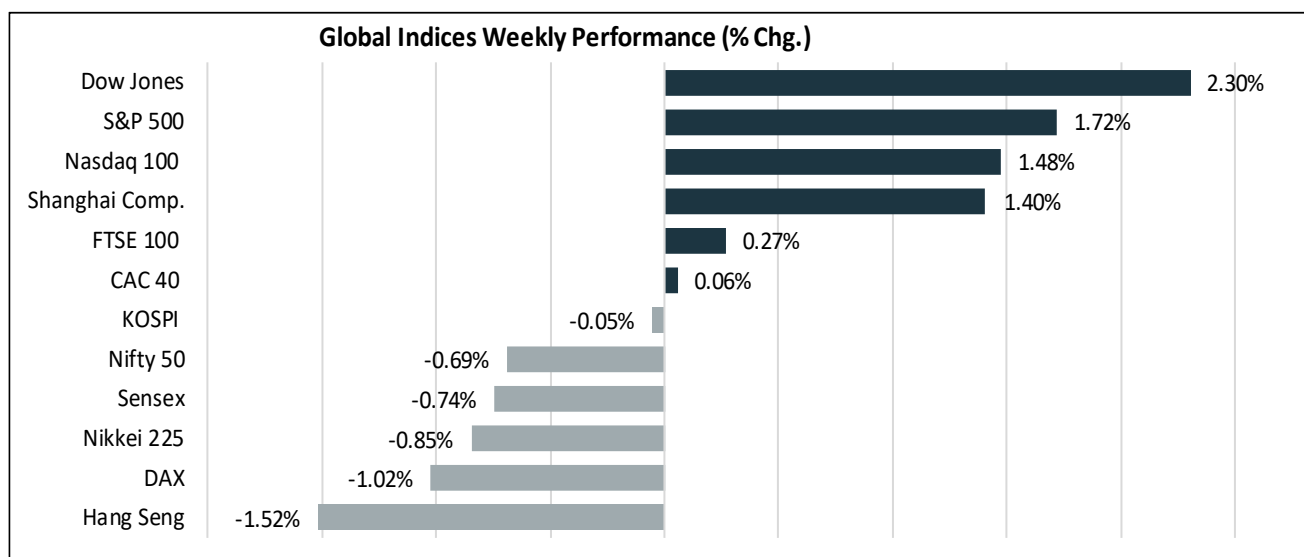
STAT EDGE

Equity Weekly Research Report

5 July 2025

Equity Weekly Research Report

Global Indices Weekly Performance



Market Summary & Outlook:

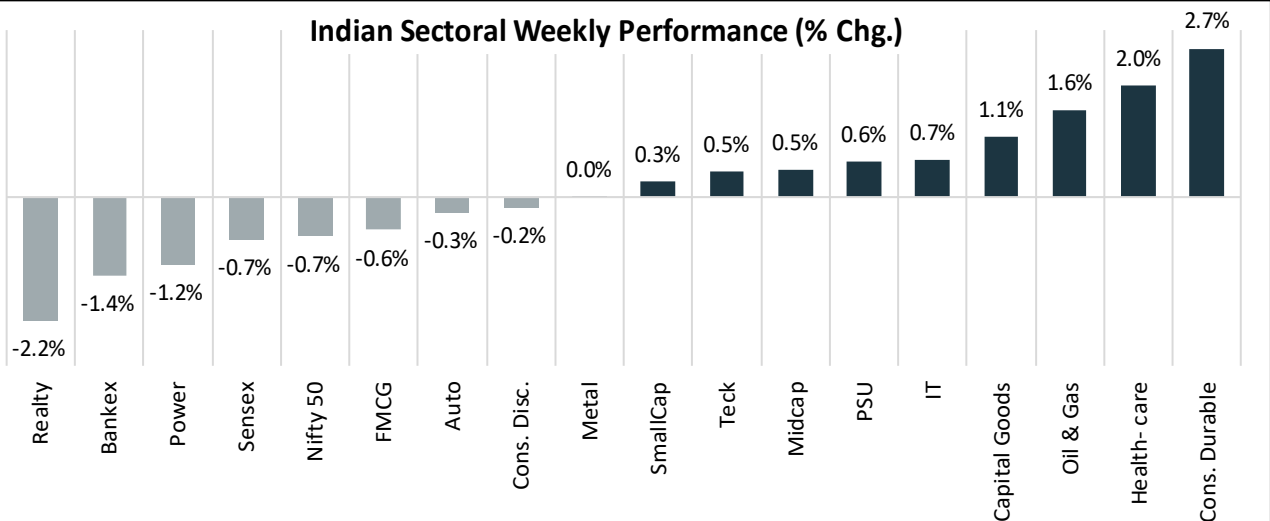
- The past week witnessed significant volatility across global financial markets, resulting in a mixed performance among key indices. Leading the charge with robust gains were several US indices, indicating strength in the North American market. The Dow Jones Industrial Average exhibited the strongest positive momentum, climbing by an impressive 2.30%. This strong performance was echoed by other major US benchmark indices as well. The S&P 500 advanced by 1.72%, and the technology-heavy Nasdaq 100 also saw a notable increase of 1.48%. This broadly positive trend in US markets suggests a potential trade deal and passing of "One Big Beautiful Bill".
- A significant number of Asian and European indices experienced declines, reflecting a more cautious or negative outlook in those regions. The Hang Seng Index in Hong Kong, in particular, bore the brunt of the downturn, registering the largest weekly loss among the featured indices at -1.52%. This decline could be attributed to various factors, including regional economic concerns.
- Indian markets delivered a middling performance over the week but ultimately closed in the red, weighed down by persistent foreign fund outflows and concerns over SEBI's probe into alleged market manipulation by certain foreign institutions. Among sectoral indices, consumer durables emerged as the top gainer, driven by optimism around strong upcoming quarterly earnings. In contrast, the real estate sector faced the steepest losses, as investors engaged in broad-based profit booking.
- The upcoming week is expected to be relatively light on economic data, with investor attention primarily centred on the approaching U.S. trade tariff deadline. Domestic developments will also remain in focus, as markets look for cues from corporate earnings expectations.

Commodity Performance			
Commodity	04-Jul-25	27-Jun-25	% Change
Gold Spot \$/Oz	3337.15	3274.33	1.92%
Silver Spot \$/Oz	36.97	35.99	2.72%
WTI Crude Oil Fut	66.50	65.52	1.50%
Currency Performance			
Currency	04-Jul-25	27-Jun-25	% Change
Dollar Index Spot	97.18	97.40	-0.23%
Euro Spot	1.1778	1.1718	0.51%
British Pound Spot	1.365	1.3716	-0.48%
Japanese Yen Spot	144.47	144.65	-0.12%
Chinese Yuan Spot	7.1633	7.1726	-0.13%
USDINR	85.39	85.49	-0.11%
EURINR	100.585	100.1063	0.48%
GBPINR	116.63	117.46	-0.70%

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	Jul-25	25792	25410	25540	-0.82%	179528	-19129	-10.00%	59309	-1703	-3%
Bank Nifty Fut	Jul-25	57850	56910	57294	-0.61%	57315	-8223	-13.00%	24501	-4705	-16%
Index	Close	Pivot	Supt.3	Supt.2	Supt.1	Resi.1	Resi.2	Resi.3	20 DMA	50 DMA	RSI
Nifty Fut	25540	25581	24816	25198	25369	25752	25963	26346	25215	24903	61.20
Bank Nifty Fut	57294	57351	55472	56411	56853	57792	58291	59231	56654	55871	60.50

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Indian Sectoral Weekly Performance (% Chg.)



Technical Outlooks:

Spot Nifty50 Index View:

- The Nifty 50 Index formed a hammer candlestick pattern by taking support at 13 DEMA.
- The short-term moving average is placed above the medium-term moving average.
- The RSI is heading higher, indicating positive momentum.
- The strong bullish candle on the daily chart suggests fresh upward momentum.

- **Nifty50 Index: Bullish**
- **Supt. 25050 Resi. 26200**



Spot Bank Nifty Index View:

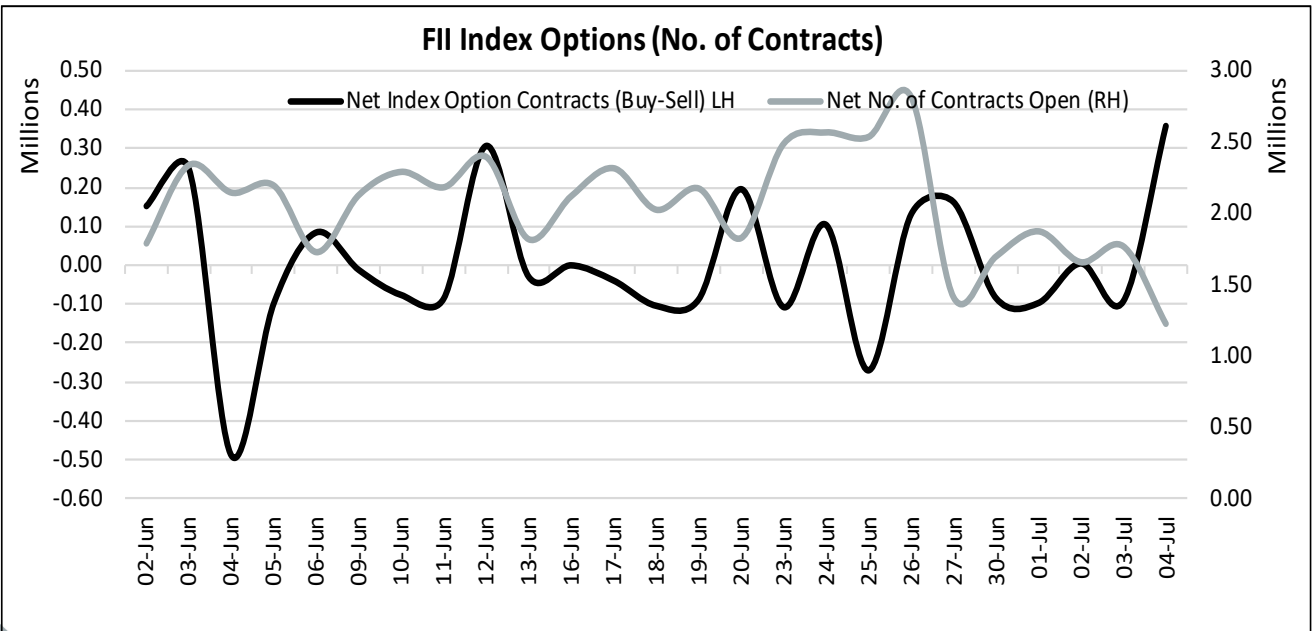
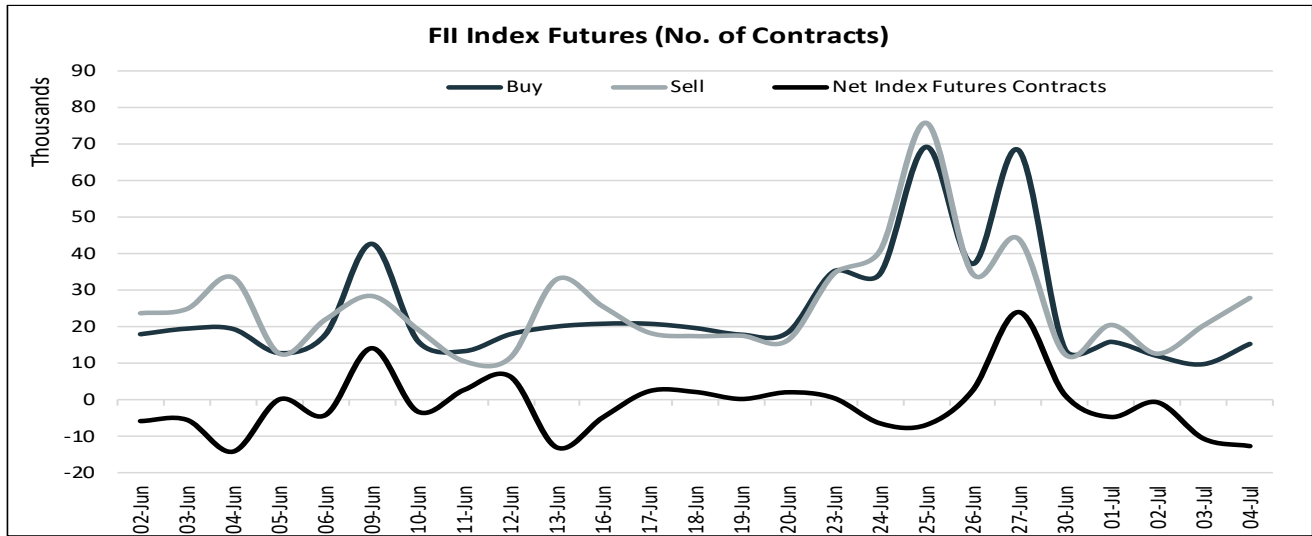
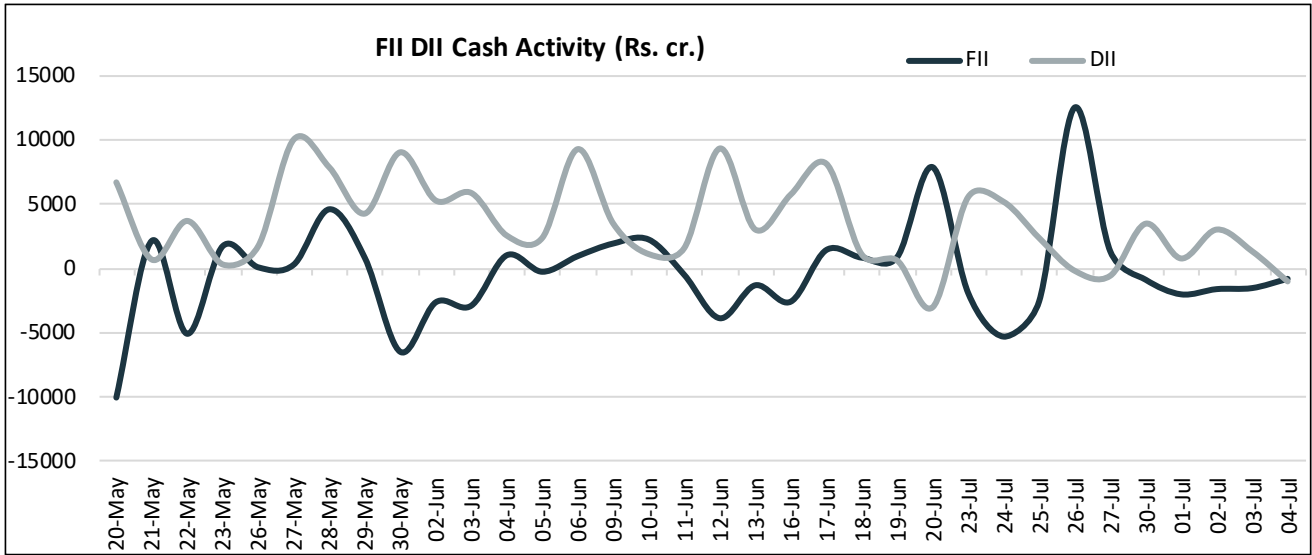
- The Bank Nifty has support of an upward sloping trendline.
- Momentum oscillator, RSI of 14 is placed around 60 and heading north, indicating positive momentum.
- It has maintained the bullish pattern of higher highs and lows.

- **Spot Bank Nifty: Bullish**
- **Supt. 56000 Resi. 58300**



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Institutional Activities



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Nifty50 Index Near Month Option Distribution Analysis:

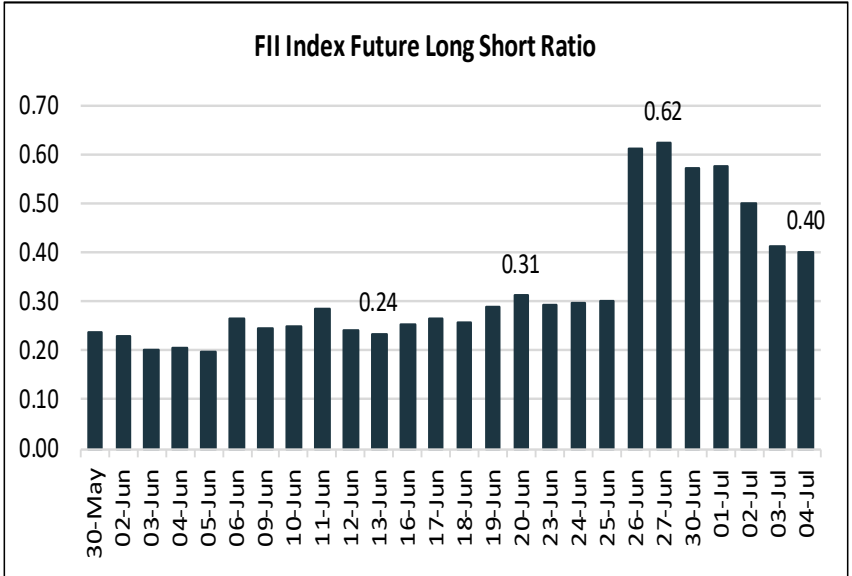
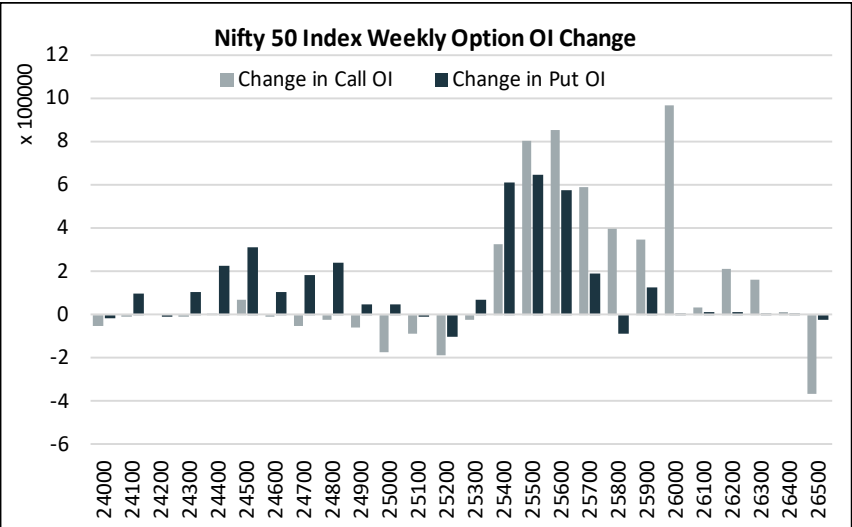
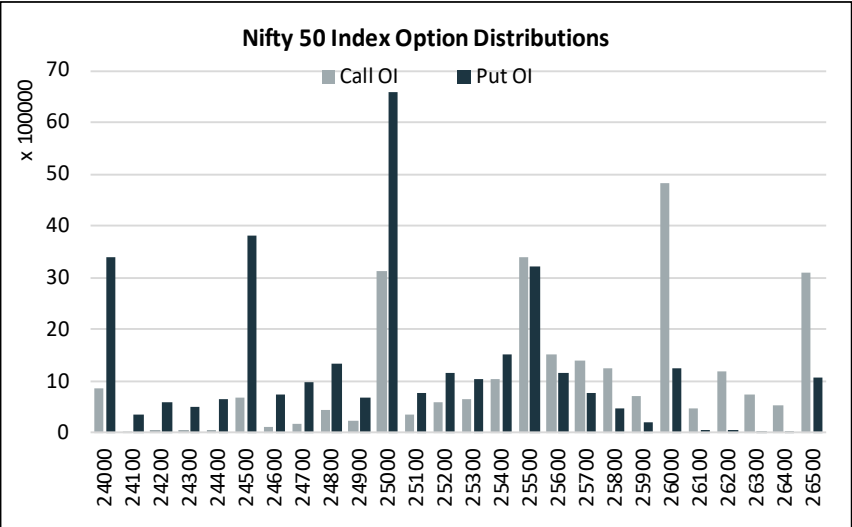
The highest open position has been seen on 25000 Strikes

OI Positions:
Highest: 25000 strikes
96.96 lakh vs 98.23 lakh contracts

Major Changes in OI:
OI Reduction: 26500 CE & 22300 PE
OI Addition: 26000 CE & 25500 PE
High Open Interest:
Addition: 25500 strike
Reduction: 26500 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 fell to 0.40 from 0.62



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Economic Calendar					
Date	Country	Event	Period	Survey	Prior
07-Jul	EC	Sentix Investor Confidence	Jul	1	0.2
	EC	Retail Sales YoY	May	1.40%	2.30%
08-Jul	Japan	BoP Current Account Balance	May	¥2962.8b	¥2258.0b
	US	NFIB Small Business Optimism	Jun	98.7	98.8
09-Jul	China	CPI YoY	Jun	-0.10%	-0.10%
	US	MBA Mortgage Applications	04-Jul	--	2.70%
	US	FOMC Meeting Minutes	18-Jun	--	--
10-Jul	US	Initial Jobless Claims	05-Jul	--	233k
	US	Continuing Claims	28-Jun	--	1964k
11-Jul	UK	Industrial Production YoY	May	0.20%	-0.30%
	UK	Manufacturing Production YoY	May	0.40%	0.40%
	UK	Construction Output YoY	May	1.70%	3.30%
	US	Federal Budget Balance	Jun	-\$40.0b	-\$316.0b
	India	Foreign Exchange Reserves	04-Jul	--	\$702.8b

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