



STAT EDGE

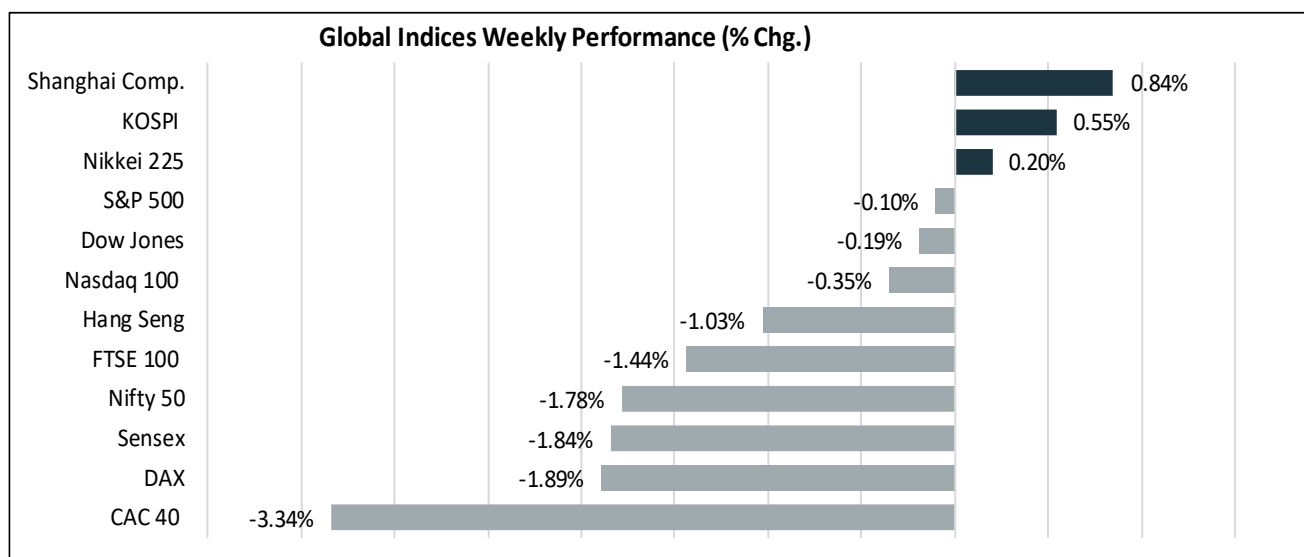
**Equity Weekly Research Report**

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**30 August 2025**

# Equity Weekly Research Report

## Global Indices Weekly Performance



## Market Summary & Outlook:

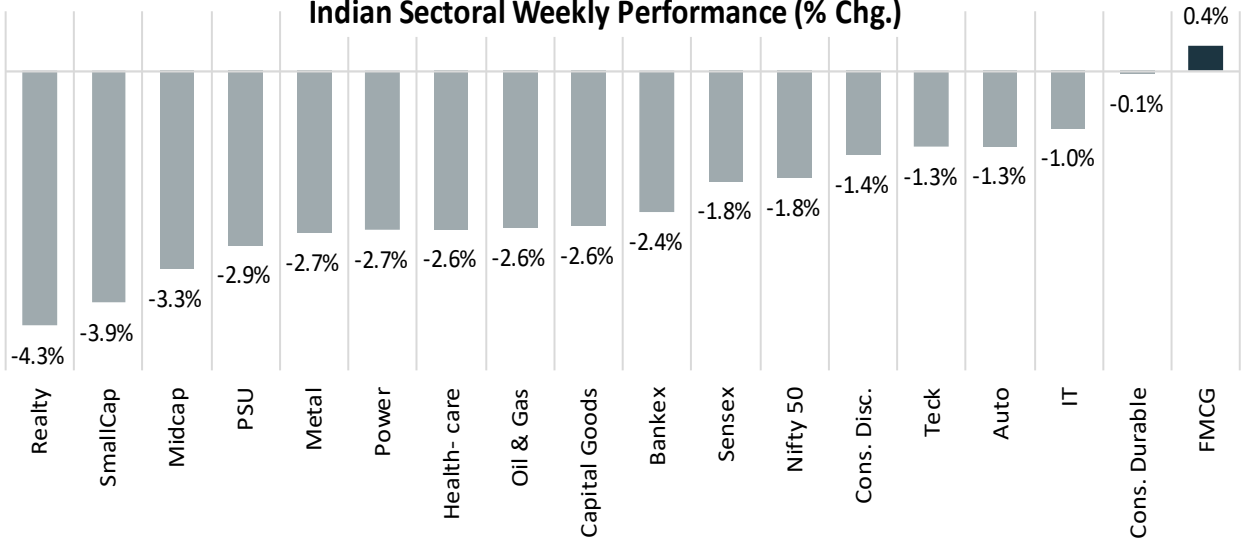
- Among major equity indices, China, South Korea, and Japan recorded the strongest gains for the week, while U.S. and European markets ended in negative territory. Despite a rough start to the month—triggered by disappointing non-farm payrolls data that underscored the fragile state of the U.S. labour market—U.S. equities managed to eke out modest monthly gains.
- Investor sentiment through earnings season remained broadly supportive, although Nvidia's latest results fell short of fueling the kind of AI-driven enthusiasm seen in prior quarters. A well-timed dovish speech by Fed Chair Jerome Powell, which hinted at possible rate cuts, helped lift equity markets toward the end of the month.
- The week ended on a cautious note across Europe. France's CAC 40 slumped around 3.3%, dragged lower by heightened anxieties about a potential collapse of the French government following an imminent parliamentary confidence vote.
- Indian equity markets endured a sharp correction during the week, with benchmark indices posting their steepest weekly losses in several months. The BSE Sensex dropped by 1.84%, closing at 79,810, while the Nifty 50 declined 1.78% to settle at 24,427. The downturn was driven primarily by escalating geopolitical and trade tensions. The U.S. government's decision to impose additional tariffs on Indian imports triggered concerns over potential retaliatory measures and added to fears of slowing global trade. Additionally, muted corporate earnings and FIIs turned net sellers, exacerbating the downturn, while DIIs provided some counterbalance but weren't enough to sustain broader gains.
- FMCG emerged as a relative outperformer, rising approximately +0.4%, buoyed by optimism around GST rate rationalisation and resilient consumer demand, while the rest sector ended in the red.
- Looking ahead, market direction will likely hinge on developments in U.S.-India trade negotiations, clarity on GST reforms, and global risk sentiment. Despite the tariff shock, India's Q1 GDP posted a robust 7.8% annual growth, offering a glimmer of resilience amid external headwinds.

Commodity Performance			
Commodity	29-Aug-25	22-Aug-25	% Change
Gold Spot \$/Oz	3447.95	3371.86	2.26%
Silver Spot \$/Oz	39.72	38.89	2.13%
WTI Crude Oil Fut	64.01	63.66	0.55%
Currency Performance			
Currency	29-Aug-25	22-Aug-25	% Change
Dollar Index Spot	97.77	97.72	0.06%
Euro Spot	1.1686	1.1718	-0.27%
British Pound Spot	1.3504	1.3525	-0.16%
Japanese Yen Spot	147.05	146.94	0.07%
Chinese Yuan Spot	7.1223	7.1719	-0.69%
USDINR	88.21	87.53	0.78%
EURINR	102.96	101.50	1.44%
GBPINR	118.74	117.41	1.13%

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	Sep-25	25163	24546	24569	-1.88%	221468	180493	440.00%	68731	48202	235%
Bank Nifty Fut	Sep-25	55725	54005	54060	-2.74%	80374	66841	494.00%	24140	15578	182%
Index	Close	Pivot	Supt.3	Supt.2	Supt.1	Resi.1	Resi.2	Resi.3	20 DMA	50 DMA	RSI
Nifty Fut	24569	24759	23525	24142	24355	24972	25376	25993	24756	25052	41.80
Bank Nifty Fut	54060	54597	51157	52877	53469	55189	56317	58037	55395	56307	30.80

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## Indian Sectoral Weekly Performance (% Chg.)



## Technical Outlooks:

### Spot Nifty50 Index View:

- The Nifty50 index closed near the previous swing low of 24038.
- The short-term moving average is placed below the medium-term moving average.
- The RSI is placed below 50 and heading south, indicating negative momentum.
- **Nifty50 Index: Negative**
- **Supt. 23800 Resi. 24700**



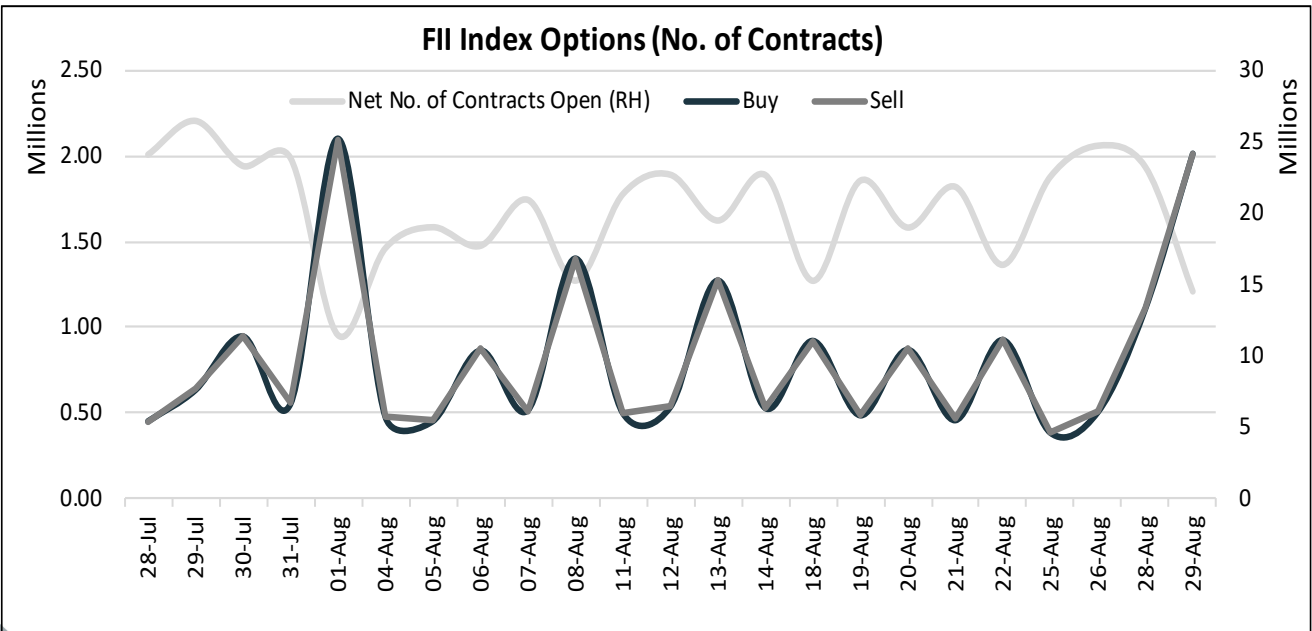
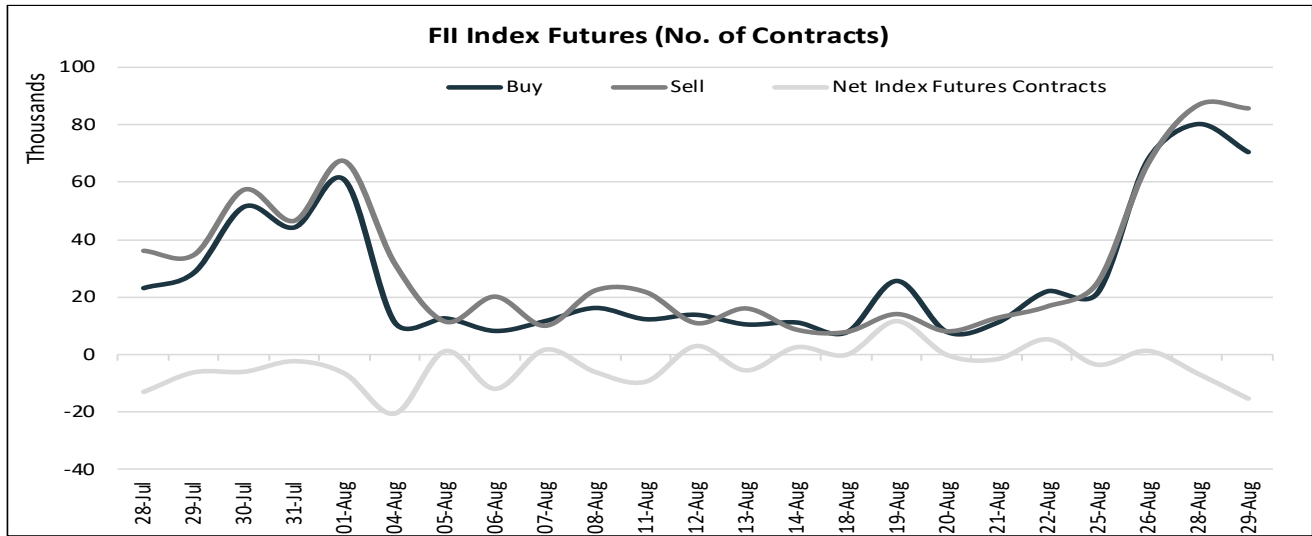
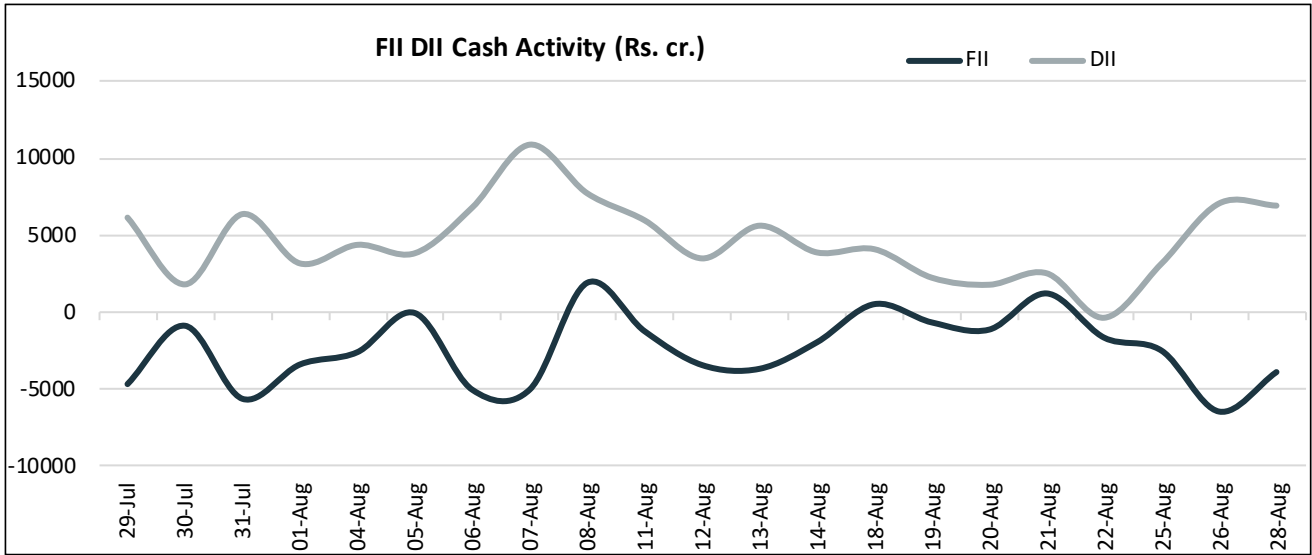
### Spot Bank Nifty Index View:

- The Bank Nifty closed below 55 DEMA.
- Momentum oscillator, RSI of 14 entered in the oversold zone, indicating a negative momentum.
- The 13 DEMA is placed below the 55 DEMA, indicating bearishness.
- **Spot Bank Nifty: Negative**
- **Supt. 52800 Resi. 54900**



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## Institutional Activities



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## Nifty50 Index Near Month Option Distribution Analysis:

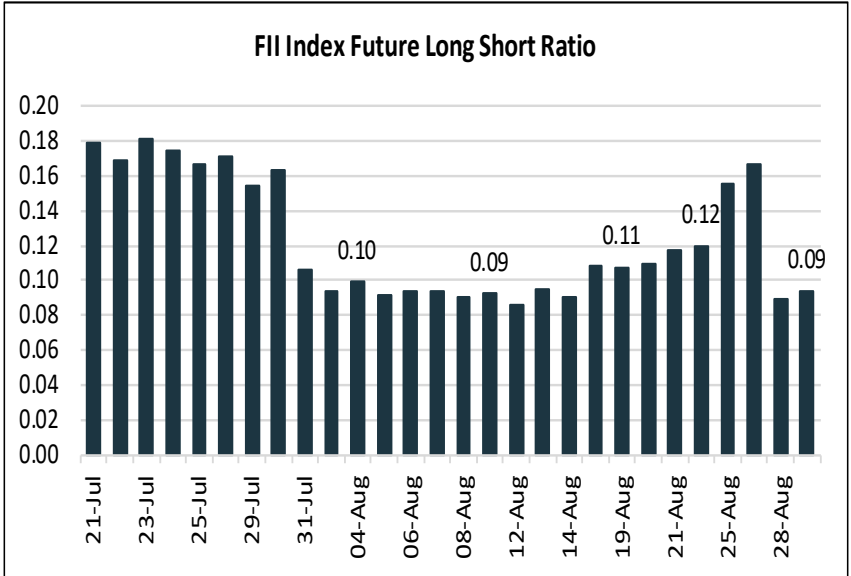
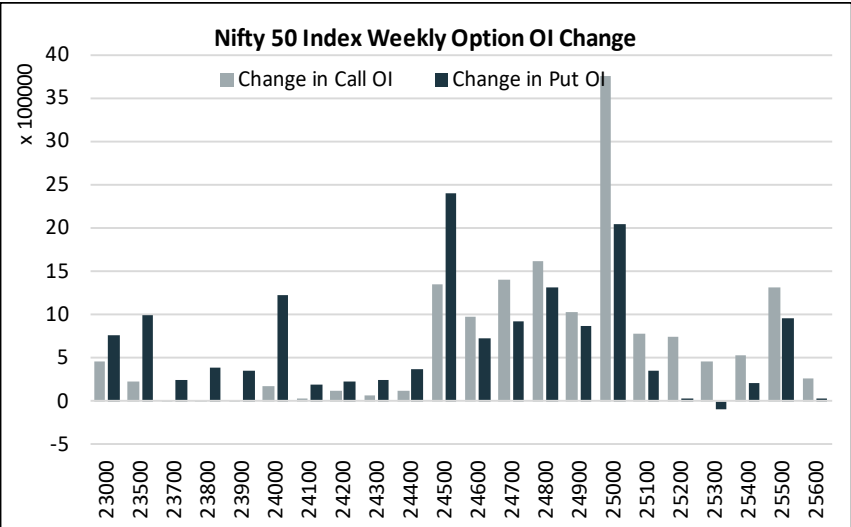
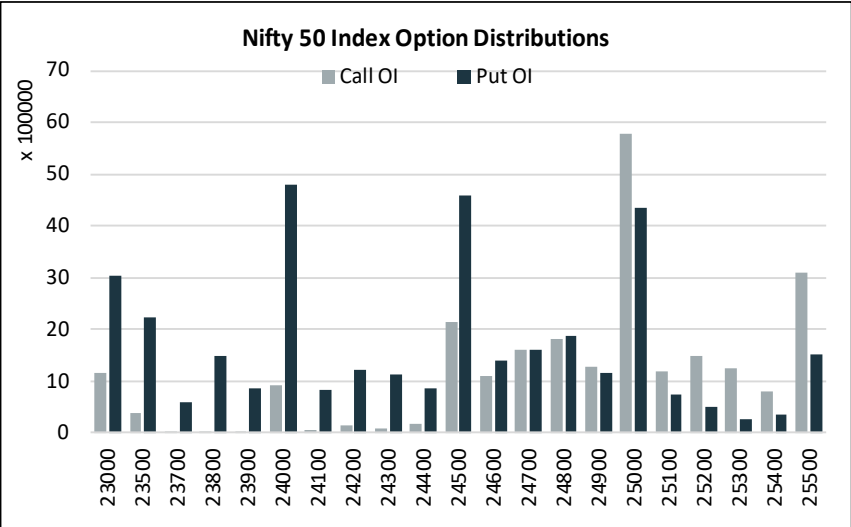
*The highest open position has been seen on 25000 Strikes*

**OI Positions:**  
**Highest: 25000 strikes**  
**101.02 lakh contracts**

**Major Changes in OI:**  
**OI Addition: 25000 CE & 24500 PE**  
**OI Reduction: 25300 PE**  
**High Activity by Open Interest:**  
**Addition: 25000 strike**

*Looking at the above observations, the Nifty50 Index could find support at 24000 and resistance at 25000*

**FII Index's future long-to-short ratio unchanged at 0.09**



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Economic Calendar					
Date	Country	Event	Period	Survey	Prior
01-Sep	Japan	S&P Global Japan PMI Mfg	Aug F	--	49.9
	China	RatingDog China PMI Mfg	Aug	49.8	49.5
	India	HSBC India PMI Mfg	Aug F	--	59.8
	EC	HCOB Eurozone Manufacturing PMI	Aug F	50.5	50.5
	UK	S&P Global UK Manufacturing PMI	Aug F	47.3	47.3
	EC	Unemployment Rate	Jul	6.20%	6.20%
02-Sep	EC	CPI MoM	Aug P	0.10%	0.00%
	EC	CPI Core YoY	Aug P	2.20%	2.30%
	US	S&P Global US Manufacturing PMI	Aug F	53.3	53.3
	US	ISM Manufacturing	Aug	49	48
03-Sep	Japan	S&P Global Japan PMI Services	Aug F	--	52.7
	China	RatingDog China PMI Services	Aug	52.5	52.6
	India	HSBC India PMI Services	Aug F	--	65.6
	EC	HCOB Eurozone Services PMI	Aug F	50.7	50.7
	UK	S&P Global UK Services PMI	Aug F	53.6	53.6
	US	MBA Mortgage Applications	29-Aug	--	-0.50%
	US	JOLTS Job Openings	Jul	7373k	7437k
	US	Factory Orders	Jul	-1.40%	-4.80%
	US	Durable Goods Orders	Jul F	-2.80%	-2.80%
	US	Fed Releases Beige Book			
04-Sep	UK	S&P Global UK Construction PMI	Aug	45	44.3
	EC	Retail Sales YoY	Jul	2.40%	3.10%
	US	Challenger Job Cuts YoY	Aug	--	139.80%
	US	ADP Employment Change	Aug	80k	104k
	US	Initial Jobless Claims	30-Aug	230k	229k
	US	Continuing Claims	23-Aug	1960k	1954k
	US	Trade Balance	Jul	-\$78.0b	-\$60.2b
	US	S&P Global US Services PMI	Aug F	55.3	55.4
	US	ISM Services Index	Aug	50.9	50.1
05-Sep	EC	GDP SA YoY	2Q T	1.40%	1.40%
	US	Change in Nonfarm Payrolls	Aug	75k	73k
	US	Unemployment Rate	Aug	4.30%	4.20%
	US	Labor Force Participation Rate	Aug	62.20%	62.20%

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