



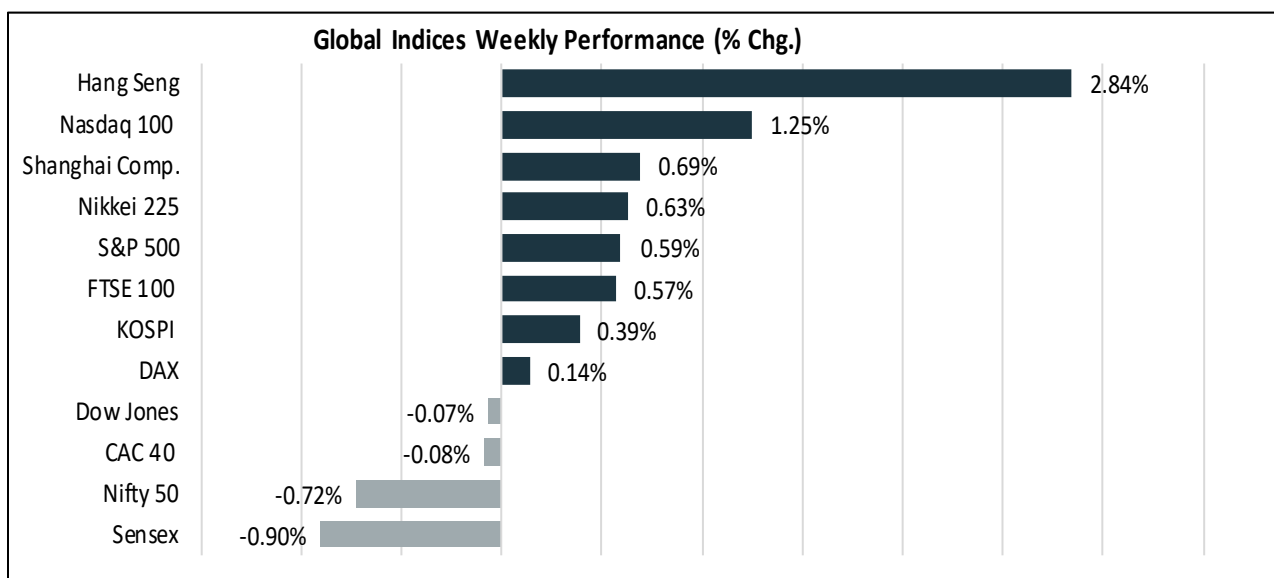
STAT EDGE

Equity Weekly Research Report

19 July 2025

Equity Weekly Research Report

Global Indices Weekly Performance



Market Summary & Outlook:

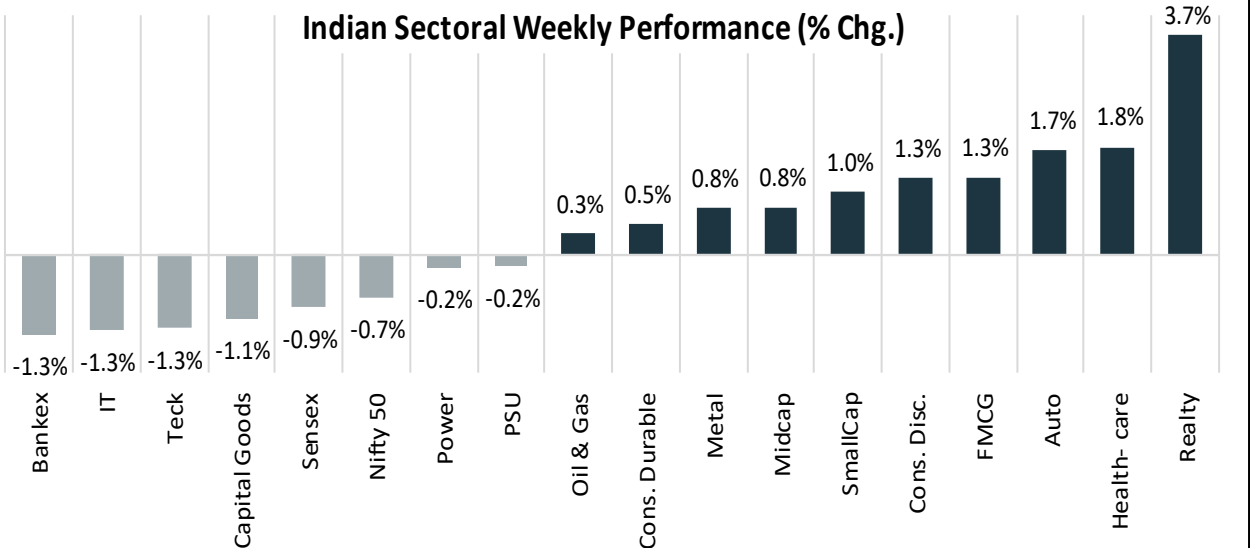
- The past week witnessed significant volatility across global financial markets, resulting in a mixed performance among key indices. Leading the charge with robust gains were several US indices, indicating strength in the North American market. The Dow Jones Industrial Average exhibited the strongest 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.

Commodity Performance			
Commodity	18-Jul-25	11-Jul-25	%
Gold Spot \$/Oz	3349.94	3355.59	-0.17%
Silver Spot \$/Oz	38.18	38.42	-0.63%
WTI Crude Oil Fut	67.34	68.45	-1.62%
Currency Performance			
Currency	18-Jul-25	11-Jul-25	%
Dollar Index Spot	98.48	97.85	0.64%
Euro Spot	1.1626	1.1689	-0.54%
British Pound Spot	1.3416	1.3493	-0.57%
Japanese Yen Spot	148.81	147.43	0.94%
Chinese Yuan Spot	7.1813	7.1717	0.13%
USDINR	86.16	85.80	0.42%
EURINR	100.2356	100.3504	-0.11%
GBPINR	115.80	116.21	-0.35%

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	25306	24981	25032	-0.76%	183184	3832	2.00%	69868	-4077	-6%
Bank Nifty Fut	Jul-25	57380	56354	56416	-0.88%	64087	6226	11.00%	38539	14334	59%
Index	Close	Pivot	Supt.3	Supt.2	Supt.1	Resi.1	Resi.2	Resi.3	20 DMA	50 DMA	RSI
Nifty Fut	25032	25106	24456	24781	24907	25232	25431	25756	25386	25095	43.00
Bank Nifty Fut	56416	56717	54665	55691	56053	57079	57743	58769	57103	56321	44.60

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Indian Sectoral Weekly Performance (% Chg.)

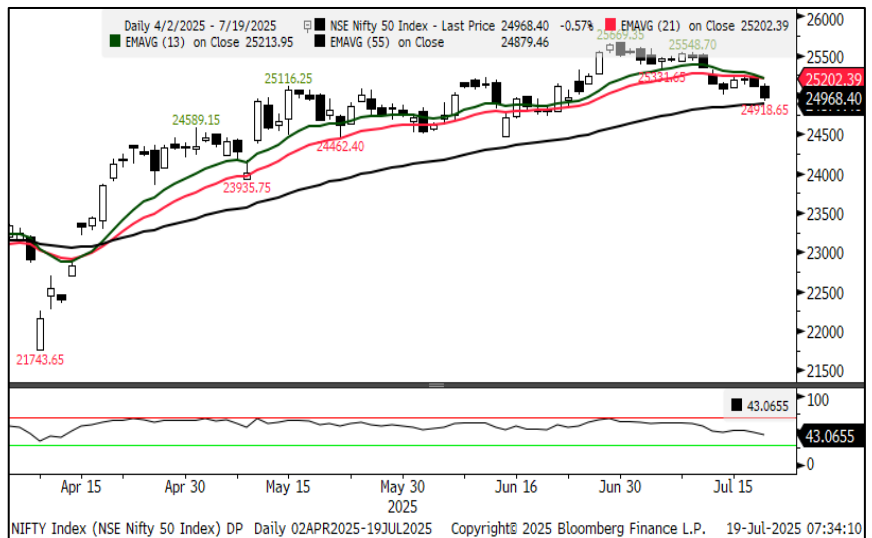


Technical Outlooks:

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.

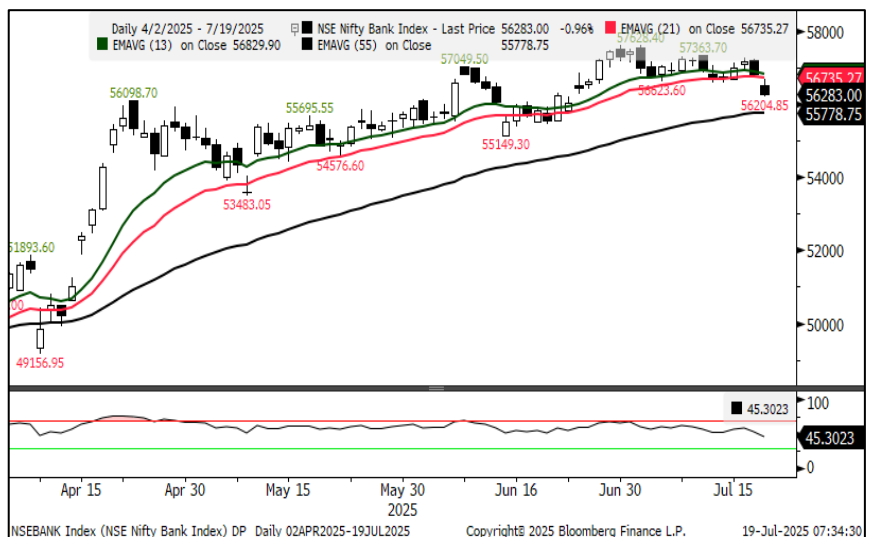
- **Nifty50 Index: Bullish**
- **Supt. 25050 Resi. 26200**



Spot Bank Nifty Index View:

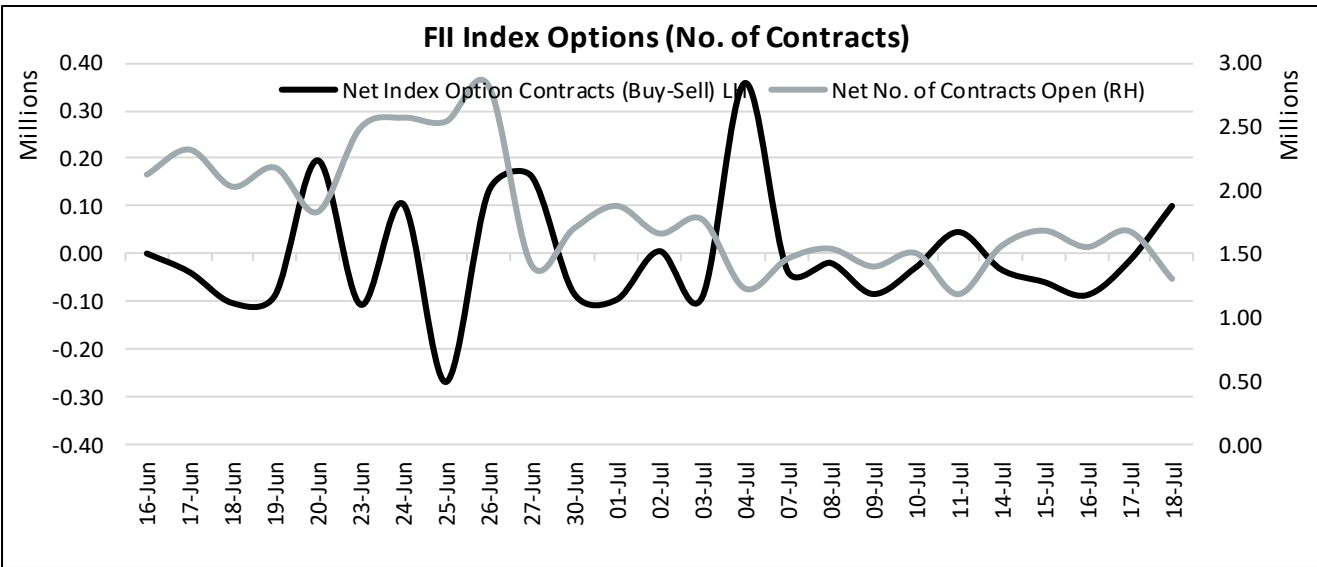
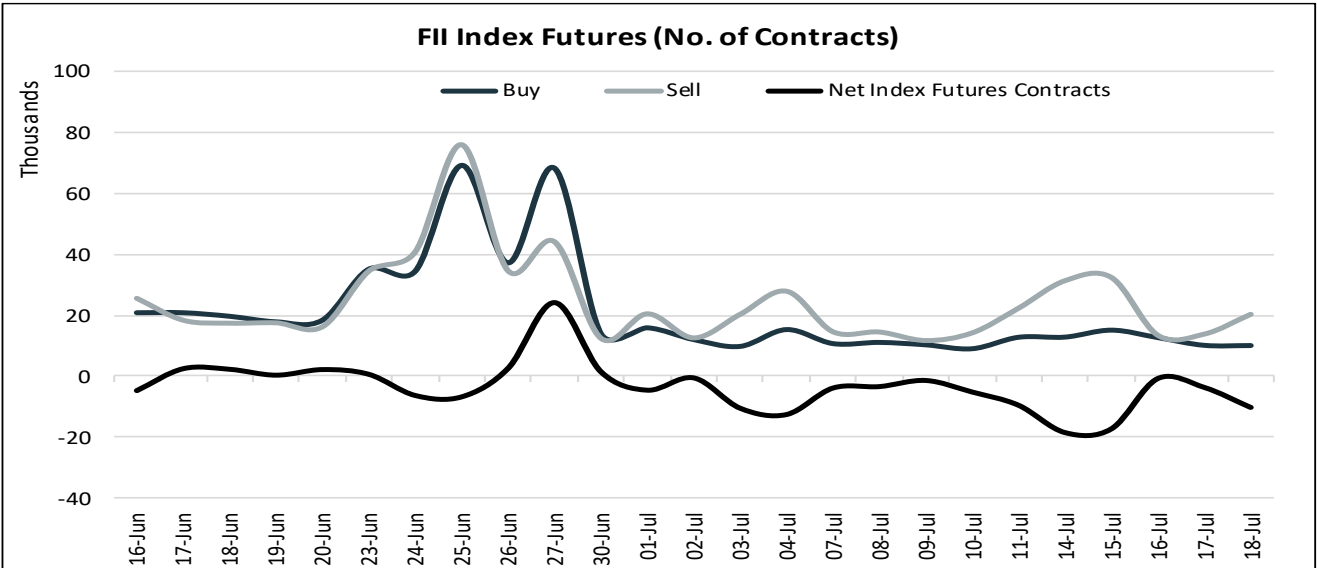
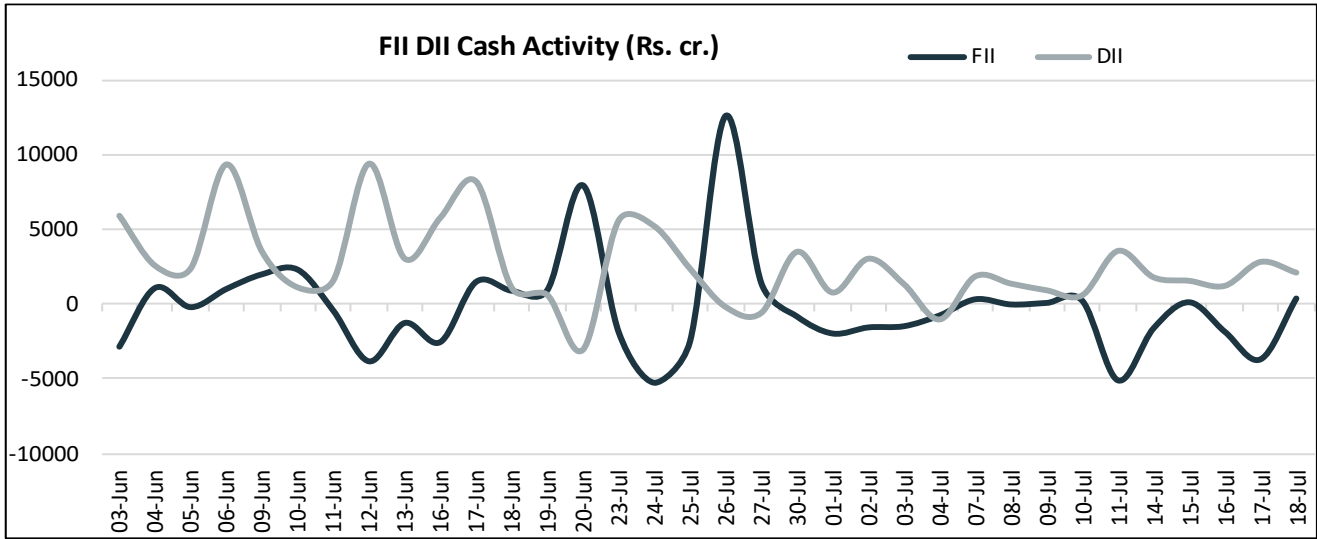
- The Bank Nifty has support of an upward sloping trendline.
- Momentum oscillator, RSI of 14 is placed around 60 and heading north, indicating positive momentum.
- It has maintained the bullish pattern of higher highs and lows.

- **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:

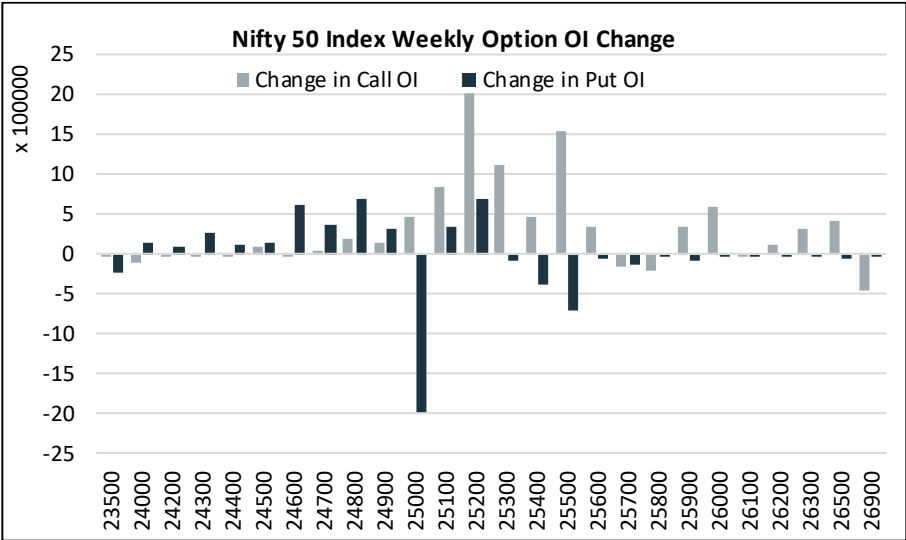
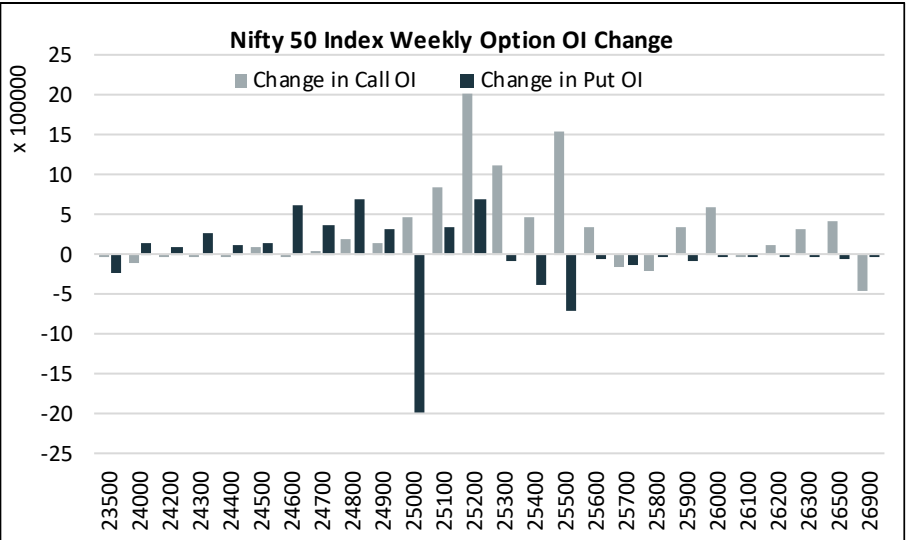
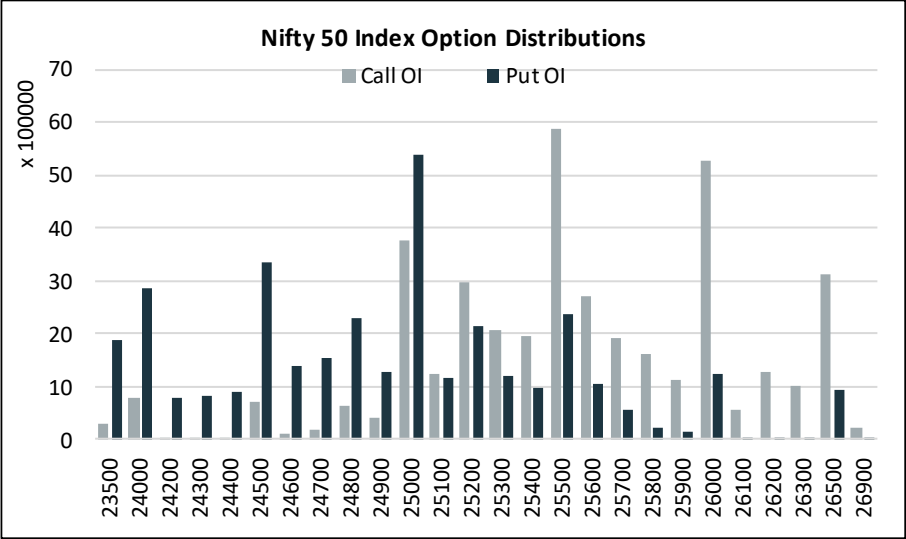
The highest open position has been seen on 25000 Strikes

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
21-Jul	China	1-Year Loan Prime Rate	21-Jul	3.00%	3.00%
	China	5-Year Loan Prime Rate	21-Jul	3.50%	3.50%
	India	Eight Infrastructure Industries	Jun	--	0.70%
	US	Leading Index	Jun	-0.30%	-0.10%
22-Jul	US	Philadelphia Fed Non-Manufacturing Activity	Jul	--	-25
	US	Richmond Fed Manufact. Index	Jul	-2	-7
23-Jul	US	MBA Mortgage Applications	18-Jul	--	-10.00%
	EC	Consumer Confidence	Jul P	-15	-15.3
	US	Existing Home Sales	Jun	4.00m	4.03m
24-Jul	India	HSBC India PMI Composite	Jul P	--	61
	EC	HCOB Eurozone Composite PMI	Jul P	50.7	50.6
	UK	S&P Global UK Composite PMI	Jul P	51.8	52
	EC	ECB Deposit Facility Rate	24-Jul	2.00%	2.00%
	EC	ECB Main Refinancing Rate	24-Jul	2.15%	2.15%
	EC	ECB Marginal Lending Facility	24-Jul	2.40%	2.40%
	US	Initial Jobless Claims	19-Jul	225k	221k
	US	Continuing Claims	12-Jul	1960k	1956k
	US	S&P Global US Composite PMI	Jul P	52.7	52.9
	US	New Home Sales	Jun	650k	623k
	US	Kansas City Fed Manf. Activity	Jul	0	-2
	US	Building Permits	Jun F	--	1397k
25-Jul	US	Durable Goods Orders	Jun P	-10.30%	16.40%
	US	Kansas City Fed Services Activity	Jul	--	3

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