



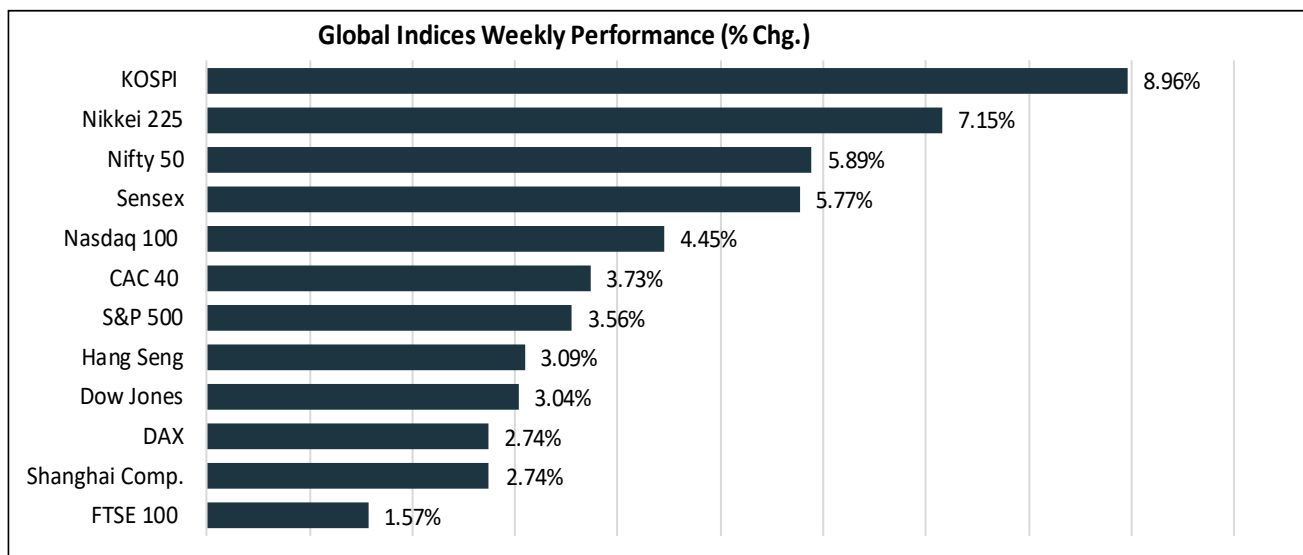
STAT EDGE

Equity Weekly Research Report

11 April 2026

Equity Weekly Research Report

Global Indices Weekly Performance



Market Summary & Outlook:

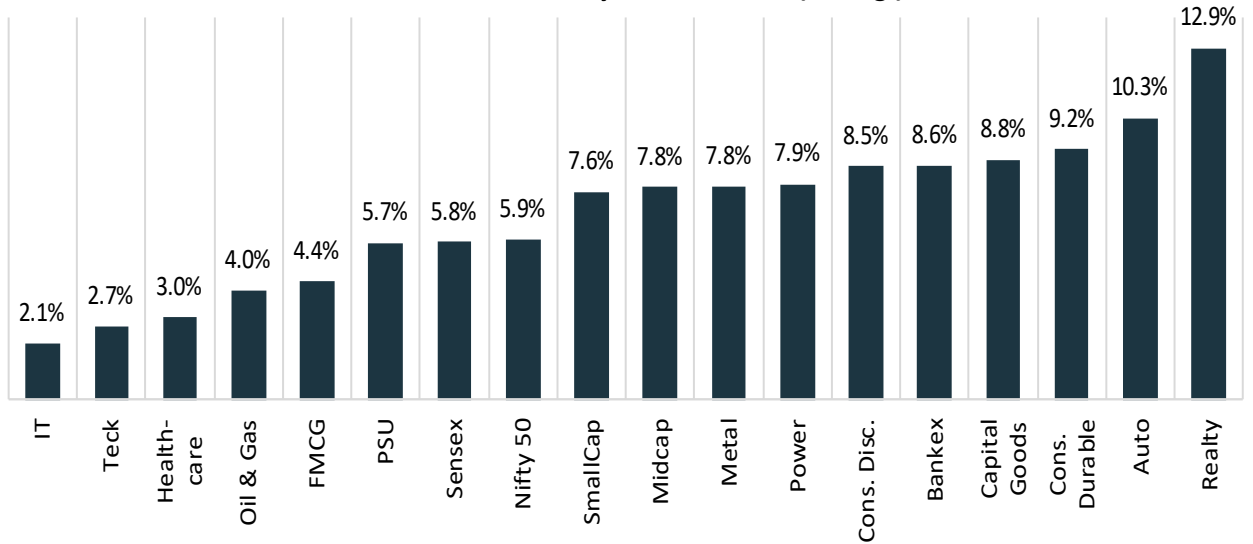
- Investors navigated a week marked by sharp geopolitical tension and shifting market sentiment, beginning with a dramatic escalation in rhetoric from Donald Trump, who warned of severe action against Iran. This initial shock rattled global markets and injected a sense of unease among participants. However, as the week progressed, diplomacy appeared to regain some ground, culminating in a fragile but meaningful ceasefire agreement between the United States and Iran. Although uncertainty lingered, the absence of further escalation helped stabilise investor confidence.
- At several points during the week, market sentiment appeared to tilt toward pessimism, with traders bracing for potential downside risks stemming from geopolitical instability and inflationary concerns. Despite these intermittent setbacks, optimism gradually resurfaced. By the close of the week, equity markets staged a broad-based recovery, with a “sea of green” across major global indices signalling renewed risk appetite and resilience among investors.
- Among key international markets, South Korea’s KOSPI index emerged as the top performer, driven by robust gains in artificial intelligence–linked stocks. In contrast, the FTSE index in the United Kingdom recorded relatively modest gains, as investors remained cautious about persistent energy inflation and its potential to weigh on economic growth and corporate profitability.
- Indian equity markets mirrored the global positive trend, with benchmark indices surging nearly 6% over the week. The rally was supported by short covering and a noticeable easing in foreign institutional investor selling pressure, which had previously weighed on the markets. With the earnings season set to commence, investor focus is now shifting toward corporate performance, particularly from major IT firms and banking institutions scheduled to report in the coming week. On the sectoral front, real estate and automobile stocks led the gains, buoyed by encouraging monthly sales data and improving demand outlook. Meanwhile, the IT sector lagged, largely influenced by muted sentiment following the earnings report from Tata Consultancy Services.

Commodity Performance			
Commodity	10-Apr-26	03-Apr-26	% Change
Gold Spot \$/Oz	4749.75	4676.76	1.56%
Silver Spot \$/Oz	75.88	73.02	3.92%
WTI Crude Oil Fut	96.57	111.54	-13.42%
Currency Performance			
Currency	10-Apr-26	03-Apr-26	% Change
Dollar Index Spot	98.65	100.03	-1.38%
Euro Spot	1.1723	1.1519	1.77%
British Pound Spot	1.3462	1.3202	1.97%
Japanese Yen Spot	159.27	159.67	-0.25%
Chinese Yuan Spot	6.8258	6.8859	-0.87%
USDINR	92.73	93.10	-0.40%
EURINR	108.61	107.32	1.20%
GBPINR	124.62	123.19	1.16%

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	Apr-26	24120	22627	24101	5.86%	285799	-43884	-13.00%	82816	-52139	-39%
Bank Nifty Fut	Apr-26	56130	51400	56077	8.22%	69490	-12917	-16.00%	34651	-18837	-35%
Index	Close	Pivot	Supt.3	Supt.2	Supt.1	Resi.1	Resi.2	Resi.3	20 DMA	50 DMA	RSI
Nifty Fut	24101	23616	20630	22123	23112	24605	25109	26602	23358	24610	53.40
Bank Nifty Fut	56077	54536	45076	49806	52942	57671	59266	63995	53991	57710	53.00

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Indian Sectoral Weekly Performance (% Chg.)



Technical Outlooks:

Spot Nifty50 Index View:

- The Nifty50 Index is trading well above the short-term moving averages.
- The RSI is placed above 50 and strengthening, indicating positive momentum.
- The trend turned positive with a trendline breakout.

- **Nifty50 Index: Positive**
- **Supt. 23050 Resi. 24500**



Spot Bank Nifty Index View:

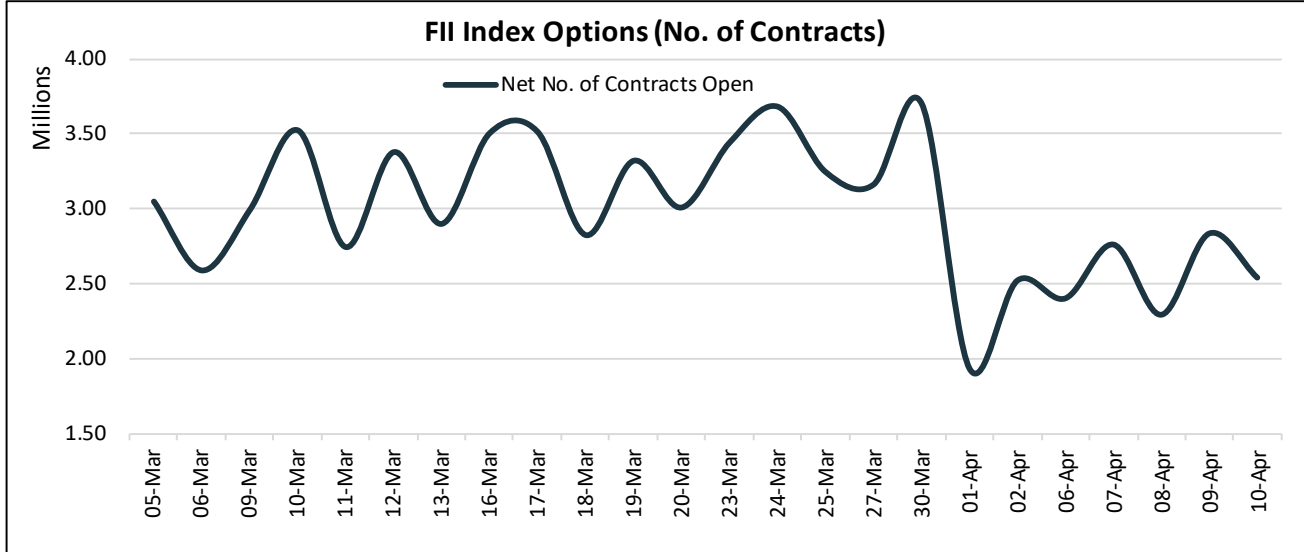
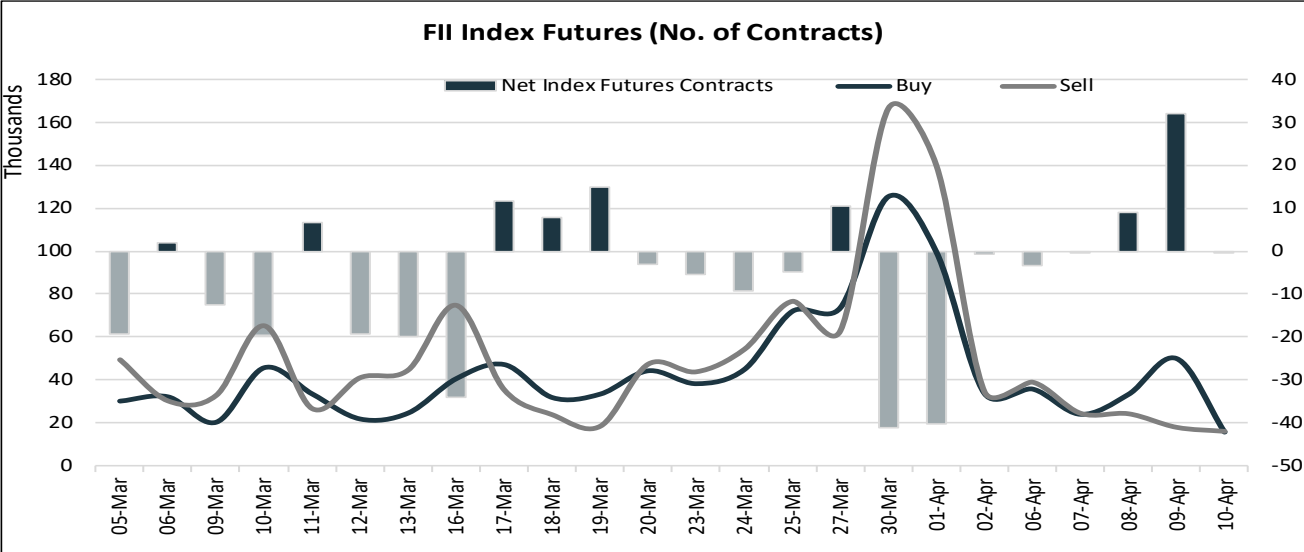
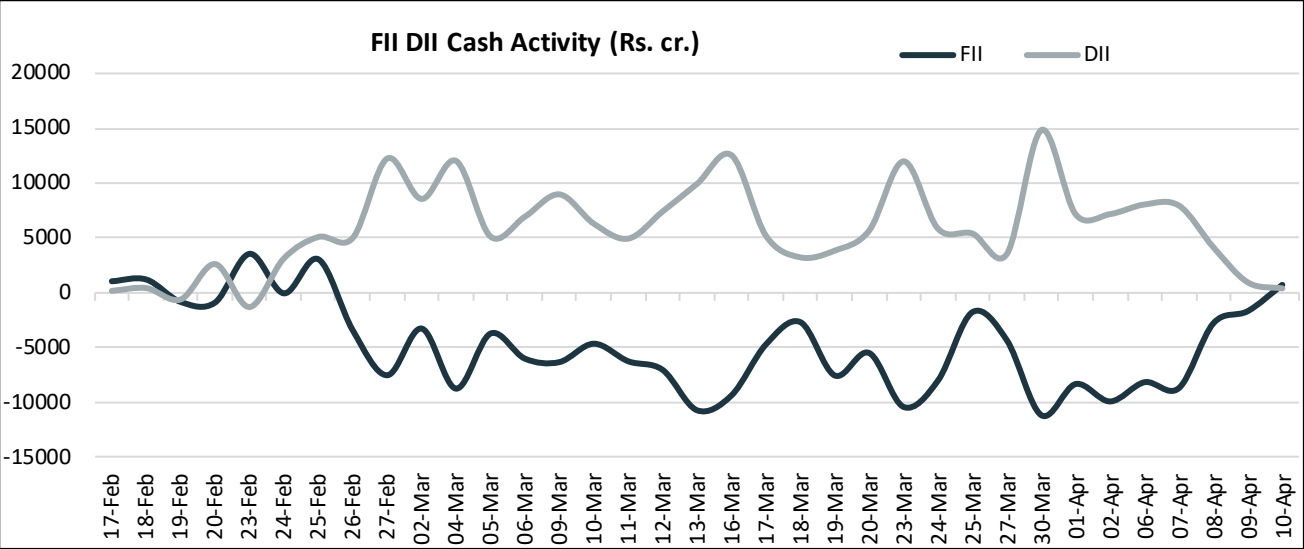
- The Nifty Bank Index formed a higher high and gave a descending channel breakout
- Daily RSI is placed above 50 and gaining, indicating positive momentum.
- The bearish chart pattern was negated with higher highs and lows on the daily chart.

- **Bank Nifty: Positive**
- **Supt. 53500 Resi. 57800**



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Institutional Activities



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Nifty50 Index Near Month Option Distribution Analysis:

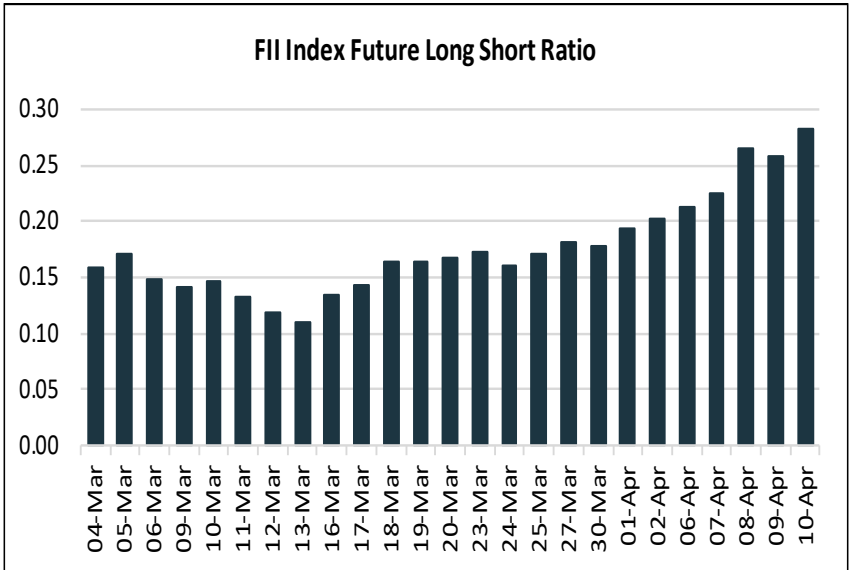
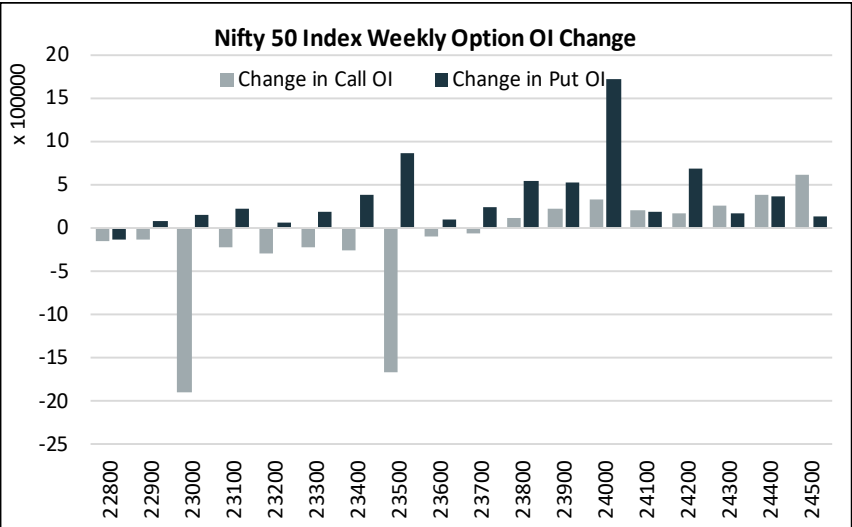
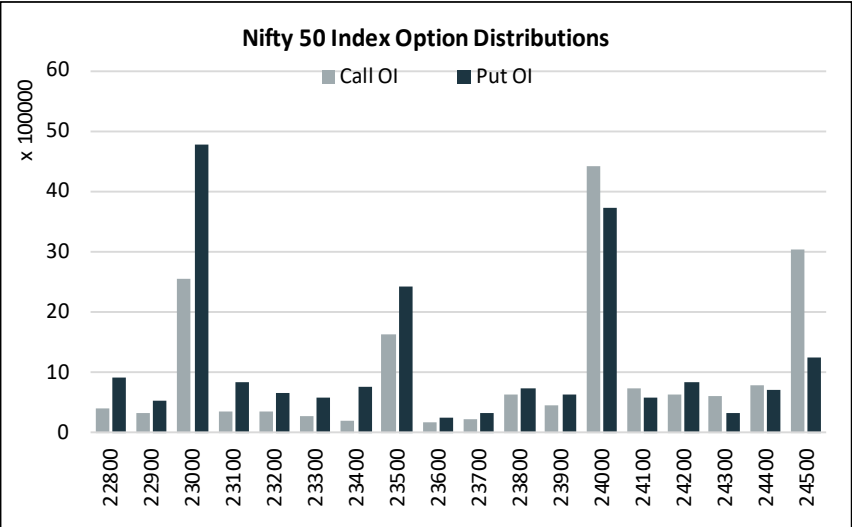
The highest open position has been seen on 24000 Strikes

OI Positions:
Highest: 2400 strikes
81.48 lakh contracts

Major Changes in OI:
Addition: 25000 CE & 24000 PE
Reduction: 23000 CE & 21000 PE
High Activity by Open Interest:
Addition: 24000 strike

Looking at the above observations, the Nifty50 Index could find support at 23000 and resistance at 25000

FII Index's future long-to-short ratio climbed to 0.28 from 0.20.



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Economic Calendar						
Date	Time	Country	Event	Period	Survey	Prior
13-Apr	16:00	India	CPI YoY	Mar	3.40%	3.21%
	19:30	US	Existing Home Sales	Mar	4.05m	4.09m
14-Apr	10:00	Japan	Industrial Production YoY	Feb F	--	0.30%
	17:45	US	ADP Weekly Employment Change	28-Mar	--	26.000k
		China	Trade Balance	Mar	\$107.65b	\$90.98b
15-Apr		India	Wholesale Prices YoY	Mar	3.56%	2.13%
	05:20	Japan	Core Machine Orders YoY	Feb	8.30%	13.70%
	14:30	EC	Industrial Production WDA YoY	Feb	-1.40%	-1.10%
	16:30	US	MBA Mortgage Applications	10-Apr	--	-0.80%
	18:00	US	Empire Manufacturing	Apr	-0.5	-0.2
	19:30	US	NAHB Housing Market Index	Apr	37	38
	23:30	US	Fed Releases Beige Book			
		India	Trade Balance	Mar	-\$29000m	-\$27100m
16-Apr	07:00	China	New Home Prices MoM	Mar	--	-0.28%
	07:00	China	Used Home Prices MoM	Mar	--	-0.43%
	07:30	China	GDP YoY	1Q	4.80%	4.50%
	07:30	China	Retail Sales YoY	Mar	2.40%	--
	07:30	China	Industrial Production YoY	Mar	5.40%	--
	11:30	UK	Monthly GDP (MoM)	Feb	0.10%	0.00%
	11:30	UK	Industrial Production YoY	Feb	-1.00%	0.40%
	11:30	UK	Manufacturing Production YoY	Feb	-0.30%	1.30%
	11:30	UK	Construction Output YoY	Feb	-0.80%	-0.20%
	11:30	UK	Trade Balance GBP/Mn	Feb	-£2000m	£3922m
	14:30	EC	CPI YoY	Mar F	2.50%	2.50%
	18:00	US	New York Fed Services Business Activity	Apr	--	-22.6
	18:00	US	Initial Jobless Claims	11-Apr	214k	219k
	18:00	US	Philadelphia Fed Business Outlook	Apr	10	18.1
	18:00	US	Continuing Claims	04-Apr	1805k	1794k
	18:45	US	Industrial Production MoM	Mar	0.10%	0.20%
	18:45	US	Manufacturing (SIC) Production	Mar	0.10%	0.20%
	18:45	US	Capacity Utilization	Mar	76.30%	76.30%
17-Apr	13:30	EC	ECB Current Account SA	Feb	--	37.9b
	14:30	EC	Trade Balance SA	Feb	--	12.1b

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