

GLOBAL MARKET INTELLIGENCE: CAUTIOUS STABILITY & THE INDIAN SHIELD

STRATEGIC CASE STUDIES | FEBRUARY 17, 2026

NEW YORK: 09:30 EST | LONDON: 14:30 GMT | MUMBAI: 20:00 IST

**CONFIDENTIAL
MARKET BRIEFING**

EXECUTIVE SUMMARY: A TALE OF TWO MARKETS

GLOBAL STAGNATION



DXY: 97.12 (+0.03%)

Global VIX: 21.85 (+3.07%)

Capital parked in USD.
Wait-and-watch mode.

INDIAN RESILIENCE



Nifty 50: 25,682 (+0.80%)

GDP Growth: 8.2%

Strong domestic absorption.
DII Net Buy +₹1,666 Cr.

ASSET STRESS



Silver: \$74.51 (-3.65%)

Bitcoin: Testing \$68k Support

Commodities cracking under
Dollar pressure.

ANALYST INSIGHT

Current state is 'Volatile Stabilization'—a pause in trend, not a reversal. Focus on Sectoral Rotation.

GLOBAL MACRO: THE 'WAIT-AND-WATCH' REGIME

US INDICES (BEARISH)

US500

6,819.8 (-0.23%)



NAS100

24,584.6 (-0.35%)



Paralyzed by inflation concerns.

GLOBAL FEAR METER (VIX)



EU INDICES (MIXED)

DAX: Modest Gains

CAC 40: Reprieve from de-risking

EURUSD: 1.1843 (-0.07%)

ACTION:

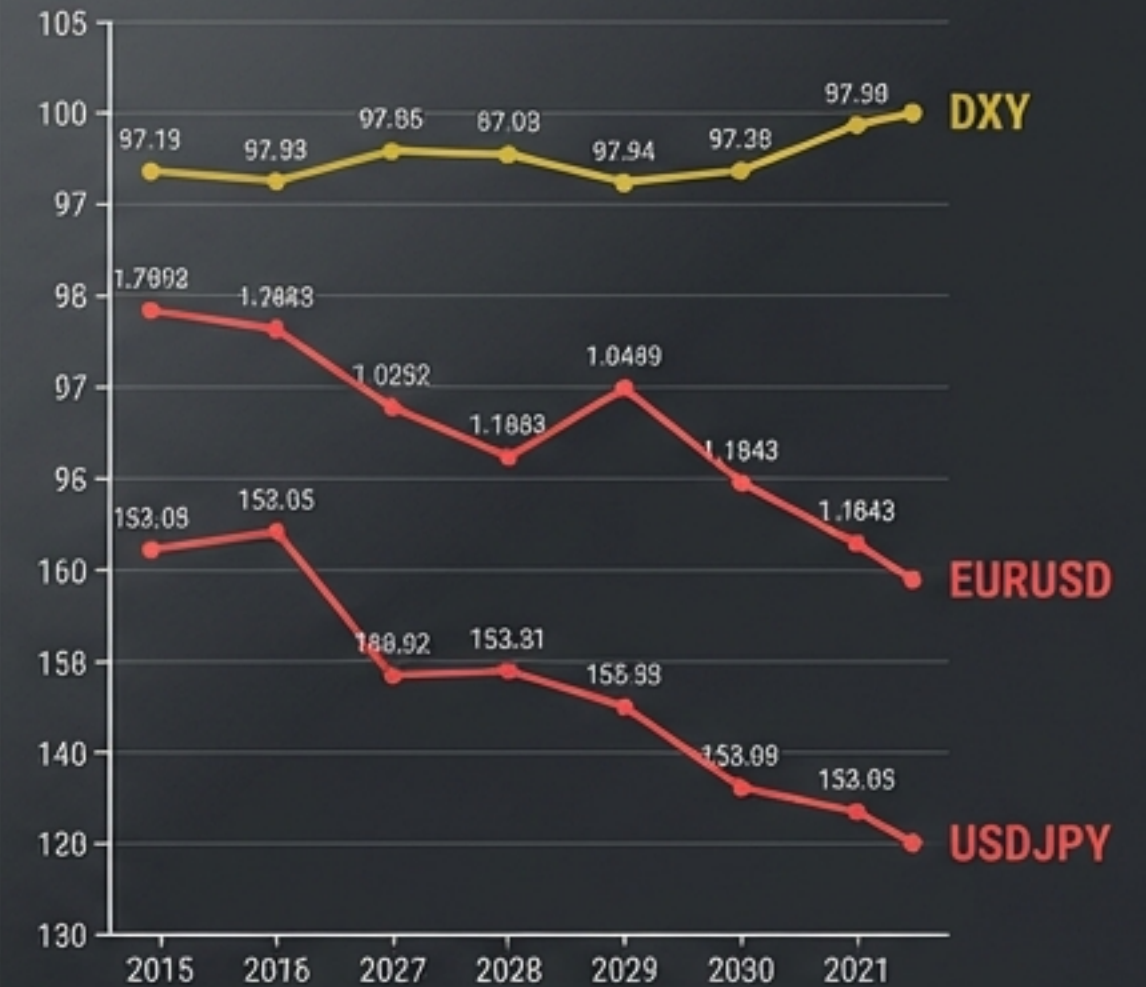
Reduce exposure to high-beta US Tech until Empire State Manufacturing data is digested.

FOREX INTELLIGENCE: DOLLAR HEGEMONY

THE GRAVITATIONAL CORE



CURRENCY COMPARISON (MULTI-LINE)



KEY INSIGHT

The Dollar Index > 97 acts as the "Master Trigger," capping risk-on trades. Rupee (USDINR) shows relative strength compared to majors.

FUNDAMENTAL DRIVERS: THE DATA DEPENDENCY

TODAY - FEB 17

JetBrains Mono

Past Week - Inflation Concerns



NY EMPIRE STATE MFG INDEX

Forecast: 6

Prior: 7.7

HIGH VOLATILITY EVENT

NAHB HOUSING MARKET INDEX

Forecast: 38

Prior: 37

FED SPEECH (BARR)

Topic: Labor Market Trajectory

DOMESTIC CATALYST

INDIA: RBI MARKET BORROWING AUCTIONS

Status: Smooth Absorption / Stable Yield Curve

STRATEGIC ACTION:

Prepare for volatility spikes around the NY Mfg print.

INDIAN EQUITIES: RESILIENT CONSOLIDATION

NIFTY 50



Support 25,600

25,682.75 (+0.80%) ↑

SENSEX: 83,277.15 (+0.80%)

Status: Bullish Breakout

NIFSEX: 83,277.15 (+0.80%)

JetBrains Mono, White
Inter

GDP Growth:

8.2%

Inter

Industrial

Production: 7.8%

Inter

ANALYST INSIGHT

The technical reclamation of 25,600 confirms a 'Buy-on-Dip' texture. India is decoupling from the US Tech sell-off.

SECTORAL ANALYSIS: THE VALUE PIVOT

CNX PSU BANK
+2.11%
Credit Growth Optimism

CNX IT
+1.03%
Demand Rebound

CNX FMCG
+0.90%

CNX AUTO
+0.52%

CNX METAL
-1.06%
Global Industrial Lag

KEY INSIGHT

Capital is rotating from industrial cyclicals (Metals) into defensive growth (IT) and Credit (PSU Banks).

STRATEGIC ACTION

Accumulate PSU Banks on dips; avoid Metals.

INSTITUTIONAL FLOW: THE LIQUIDITY CUSHION

FII SELL

-₹972.13 Cr

Selective Exit

JetBrains Mono
+₹1,666.98 Cr

DII BUY

Strong Absorption

DII INFLOW

>

FII OUTFLOW

=

NET LIQUIDITY
POSITIVE

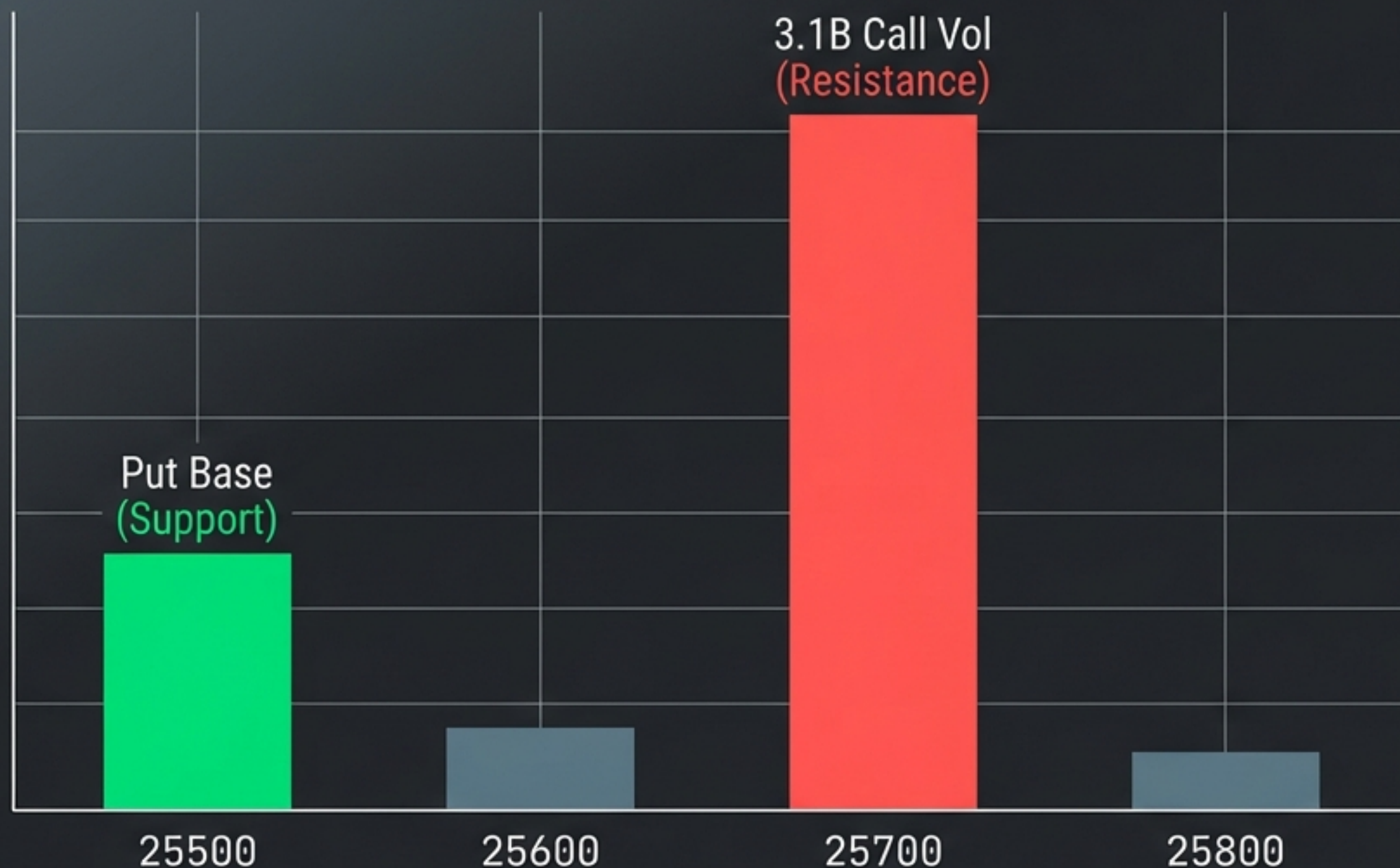


ANALYST INSIGHT

This defines the 'Indian Shield.' Domestic savings are powerful enough to neutralize global outflows.

F&O INTELLIGENCE: HEDGING THE TAIL RISK

OPEN INTEREST (OI) DISTRIBUTION



FII FLOWS & STRATEGY

FII Index Options:

-₹8,055 Cr (Net Sell)

Aggressive Hedging

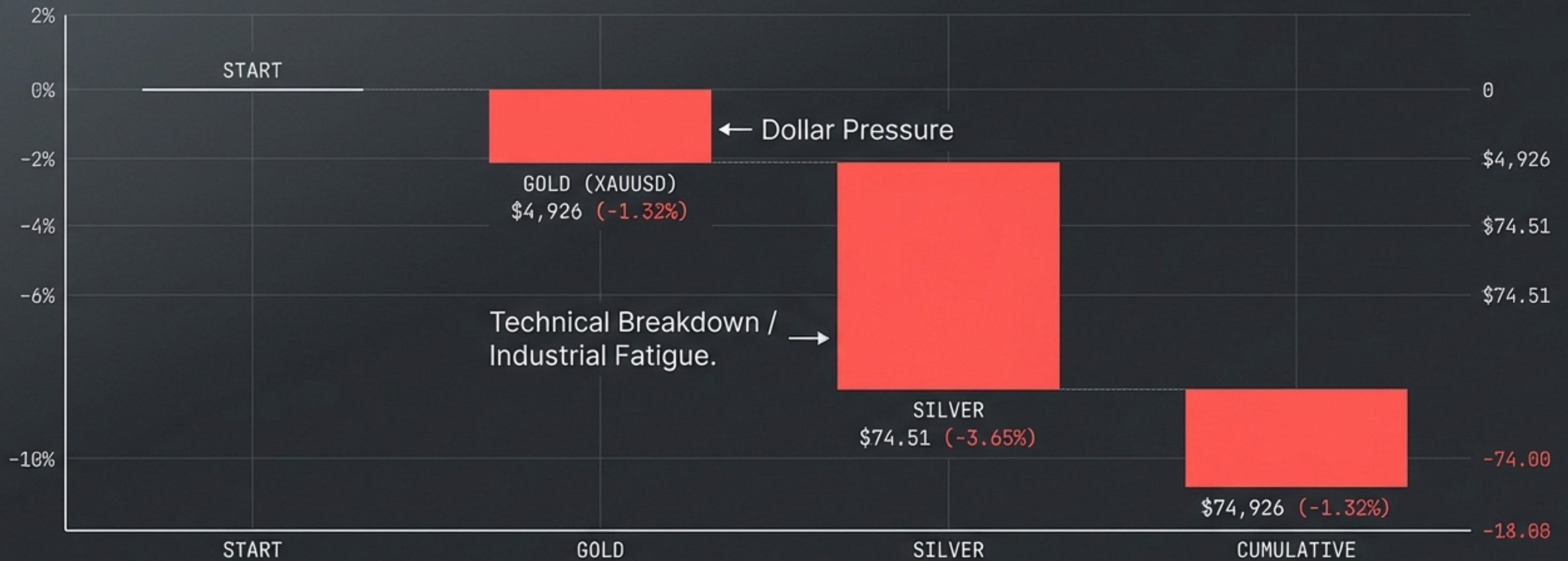
FII Index Futures:

+437 Cr (Long)

STRATEGIC ACTION

Expect range-bound movement.
25,700 is the ceiling for the current expiry.

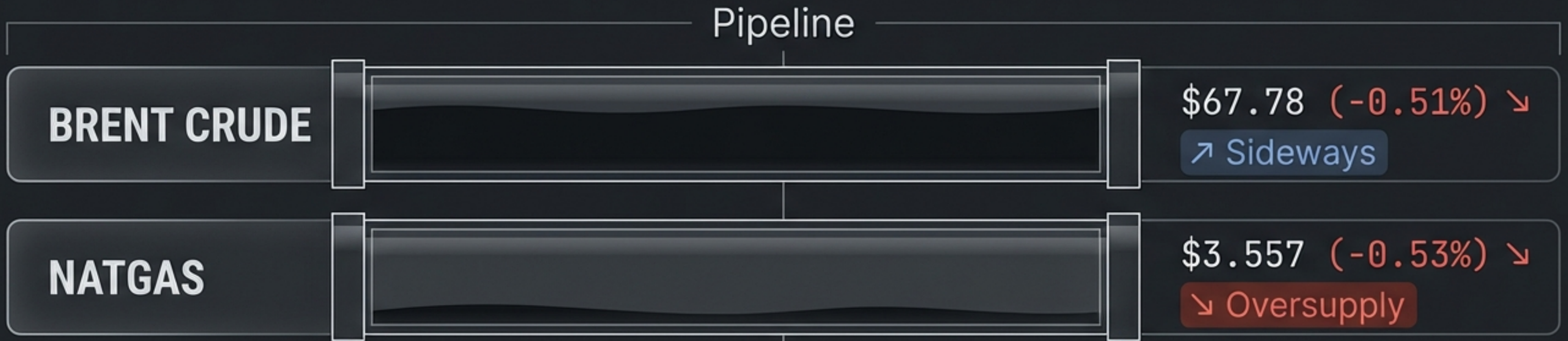
COMMODITIES: THE DOLLAR CASUALTY



KEY INSIGHT

Silver is the lead indicator for industrial slowdown. Its crash suggests caution for global manufacturing.

ENERGY COMPLEX: SUPPLY OVERHANG



KEY DRIVERS & OUTLOOK

- **Geopolitical Risk Premiums:** Fading (Reduced conflict premium)
- **Supply Outlook:** Steady (OPEC+ compliance & non-OPEC output stable)

STRATEGIC ACTION

Neutral stance. No clear trend triggers present in the Energy complex.

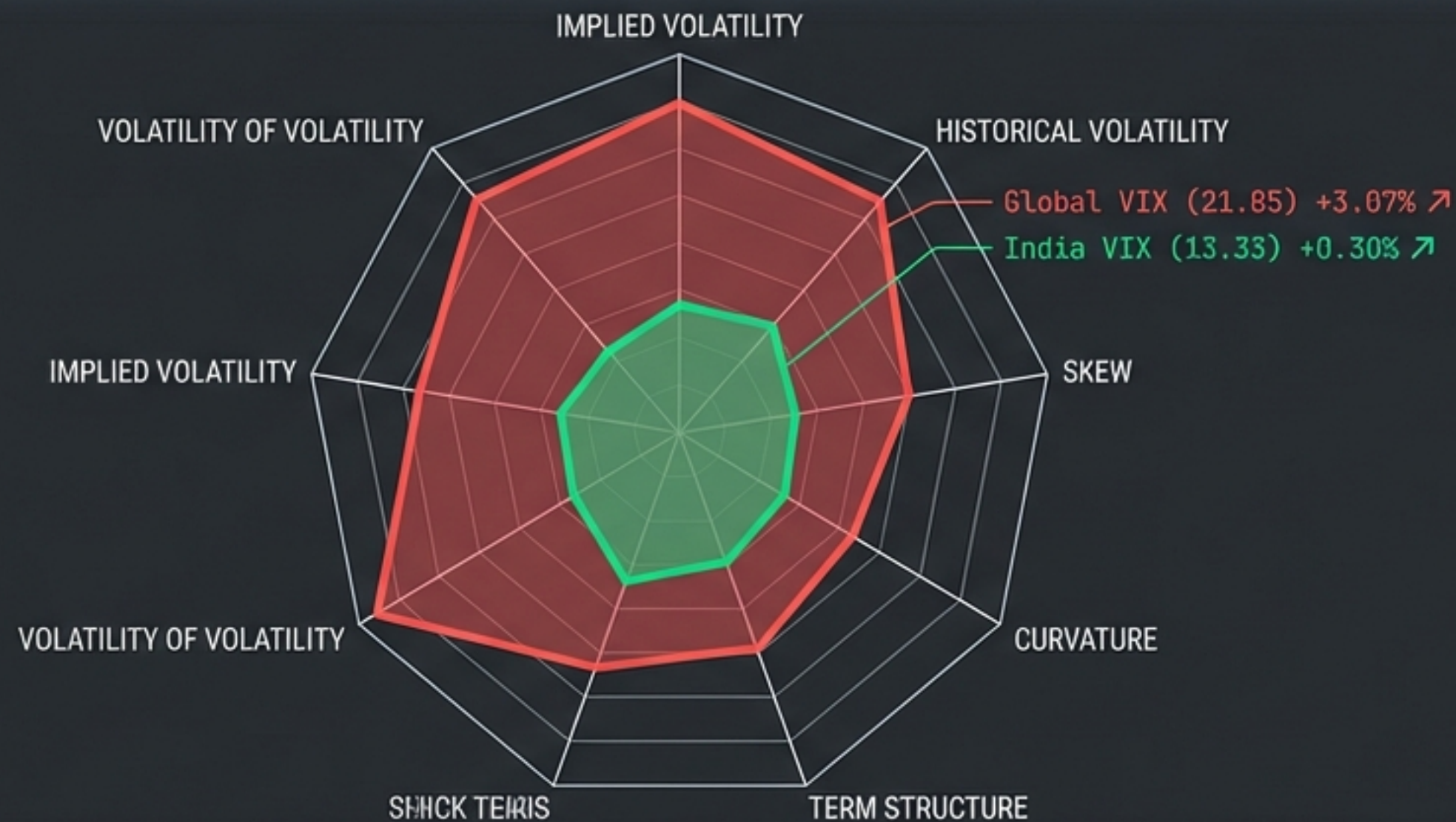
DIGITAL ASSETS: ETF OUTFLOW JITTERS



BTC	\$67,890 ↓ (-1.41%)	Testing Support
ETH	\$1,966 ↓ (-1.53%)	Bearish Divergence

ANALYST INSIGHT

Crypto is acting as a high-beta proxy for Tech. If NAS100 falls, BTC likely breaks \$68k.



KEY INSIGHT

Fear is not uniform. The West is anxious; India is calm.

STRATEGIC ACTION

Use Indian indices as a 'Volatility Hedge' against Western market turbulence.

TRAINING MODULE: THE 'INSTITUTIONAL DELTA'

aiTrendview

DII BUY (QUALITY) > FII SELL (VOLUME) = LOCAL BOTTOM

Case Study

DATE: Feb 17, 2026
FII SELL: -₹972 Cr
DII BUY: +₹1,666 Cr
RESULT: Market Gain +0.8%

KEY LESSON

Sticky domestic money > Hot foreign money. Always track the 'Net Liquidity Surplus'.

FINAL INTELLIGENCE BRIEFING

aiTrendview

1. **MACRO:** **Neutral/Bearish** (Watch DXY > 97)
2. **INDIA:** **Bullish/Accumulate** (Focus on IT/PSU Banks)
3. **COMMODITIES:** **Avoid** (Silver breakdown)

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