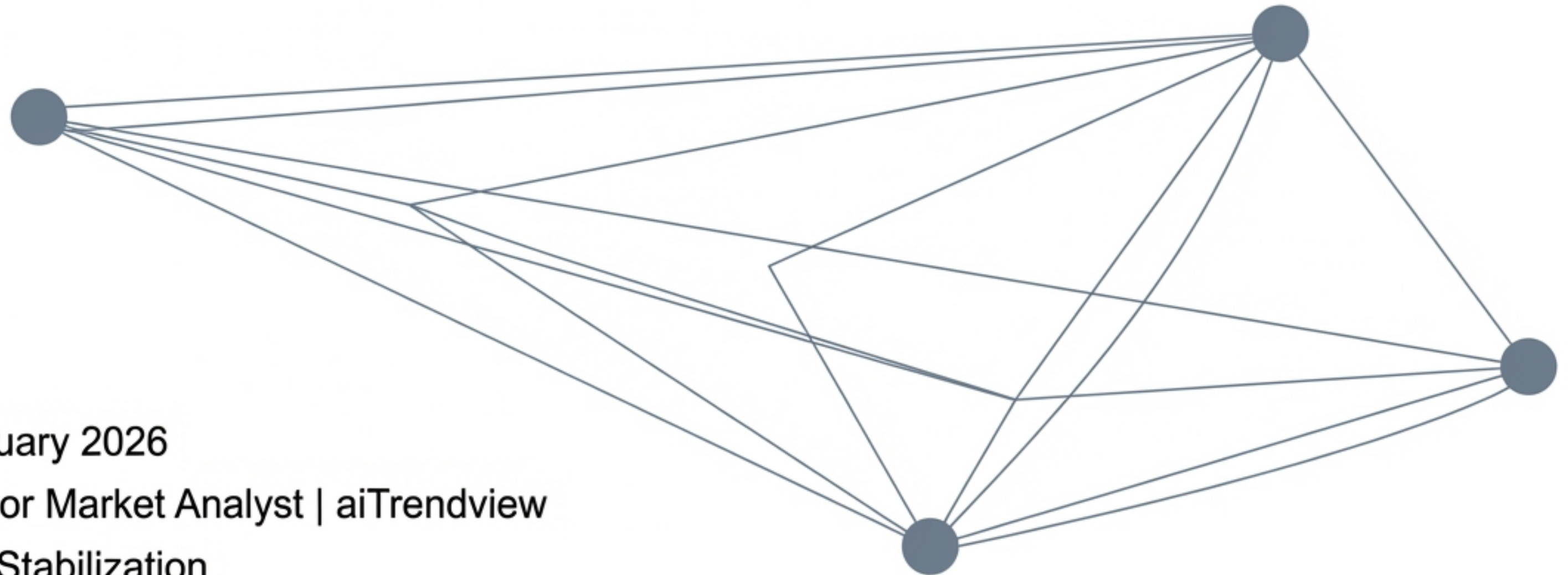


Global Market Intelligence & Strategic Outlook

aiTrendview

Analysis of Volatility Contagion, Institutional Flows,
and Asset Divergence



Date: 20th February 2026

Presenter: Senior Market Analyst | aiTrendview

Series: Volatile Stabilization

Executive Summary – The Macro Snapshot

Macro Dashboard

US Tech Resilience

US500 Futures: 6,874
+0.26%

Risk-On Bias



Dollar Liquidity

DXY Index: 97.99
+0.18%

Liquidity Tightening



India Volatility

India VIX: 14.14
+5.03%

Hedging Demand



India Market Broad

NIFTY 50: 25,553
+0.39%

Broad Buying



Analyst Insight: Current market behavior reflects 'Shadow Deflation'—prices are rising, but heavy hedging activity indicates a lack of conviction. Risk appetite is selective, not structural.

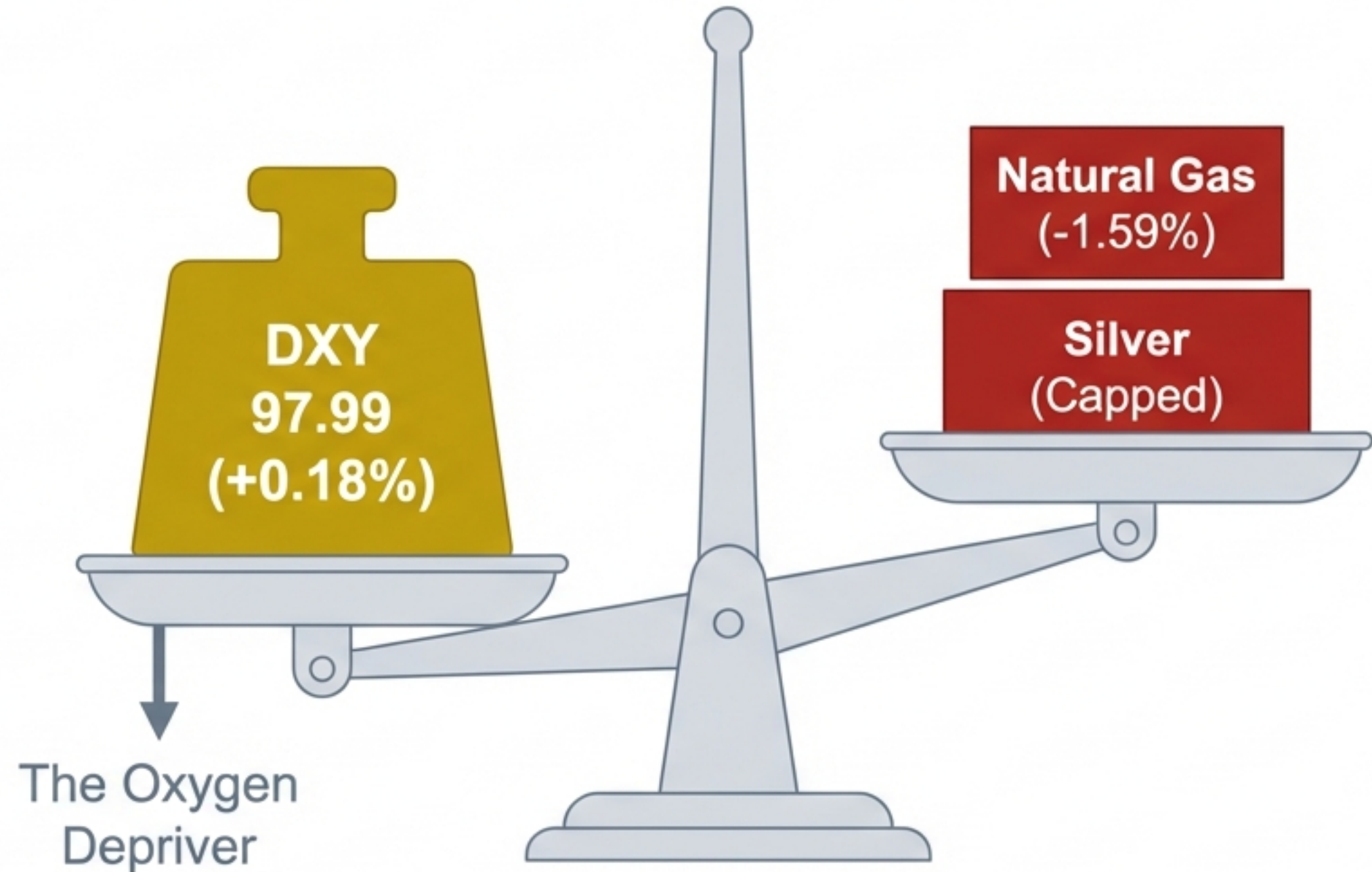
Global Macro Shifts – The Dollar Pivot

Key Insight:

The PCE-Dollar Pivot is the primary driver of cross-asset weakness.

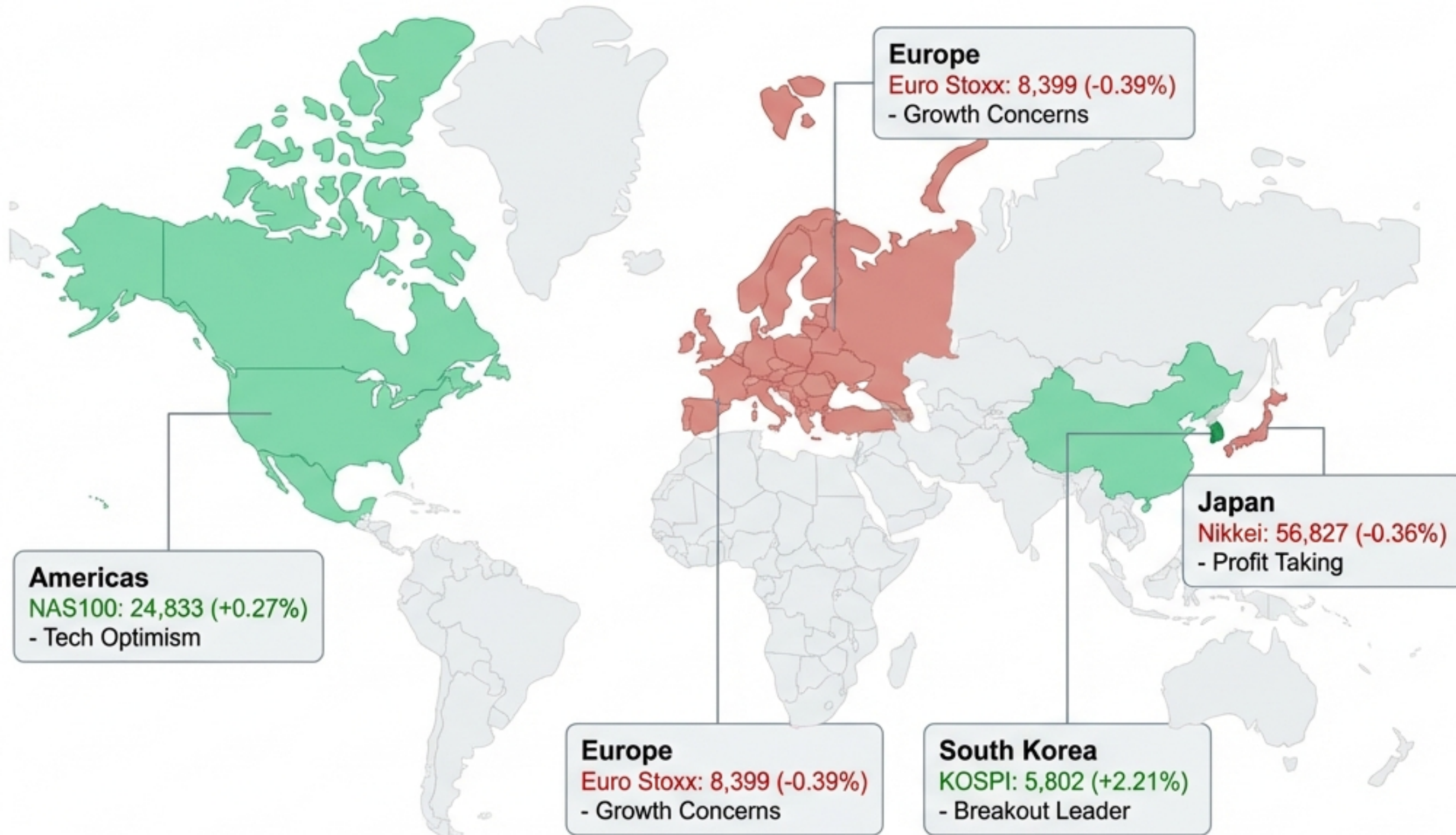
Data:

- DXY Index: 97.99 (+0.18%)
- EURUSD: 1.1753 (-0.17%) - Mild downtrend confirms USD dominance.



Strategic Action: When DXY breaks 97.99, initiate 25% 'Short Buffer' on Risk-On assets.

Regional Analysis – Americas vs. Eurasia



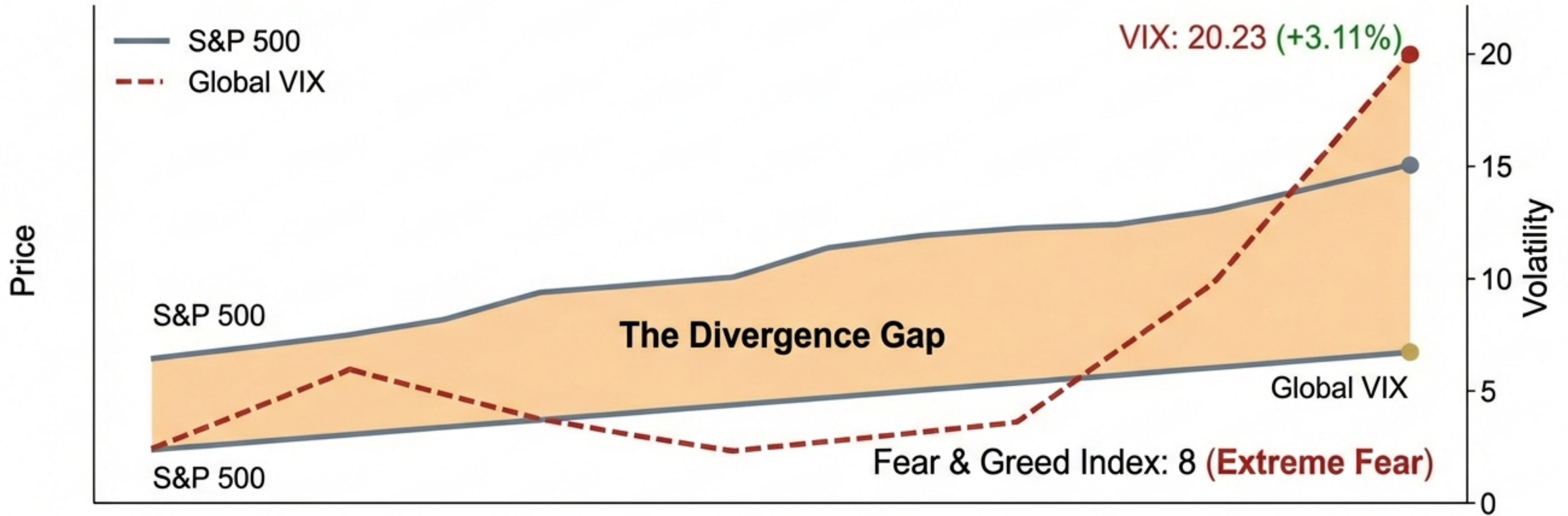
Key Insight:

Regional Divergence highlights unsynchronized global expansion.

Analyst Note:

South Korea is the regional leader; Europe remains the laggard due to cautious macro positioning.

The Volatility Paradox (Global Risk)



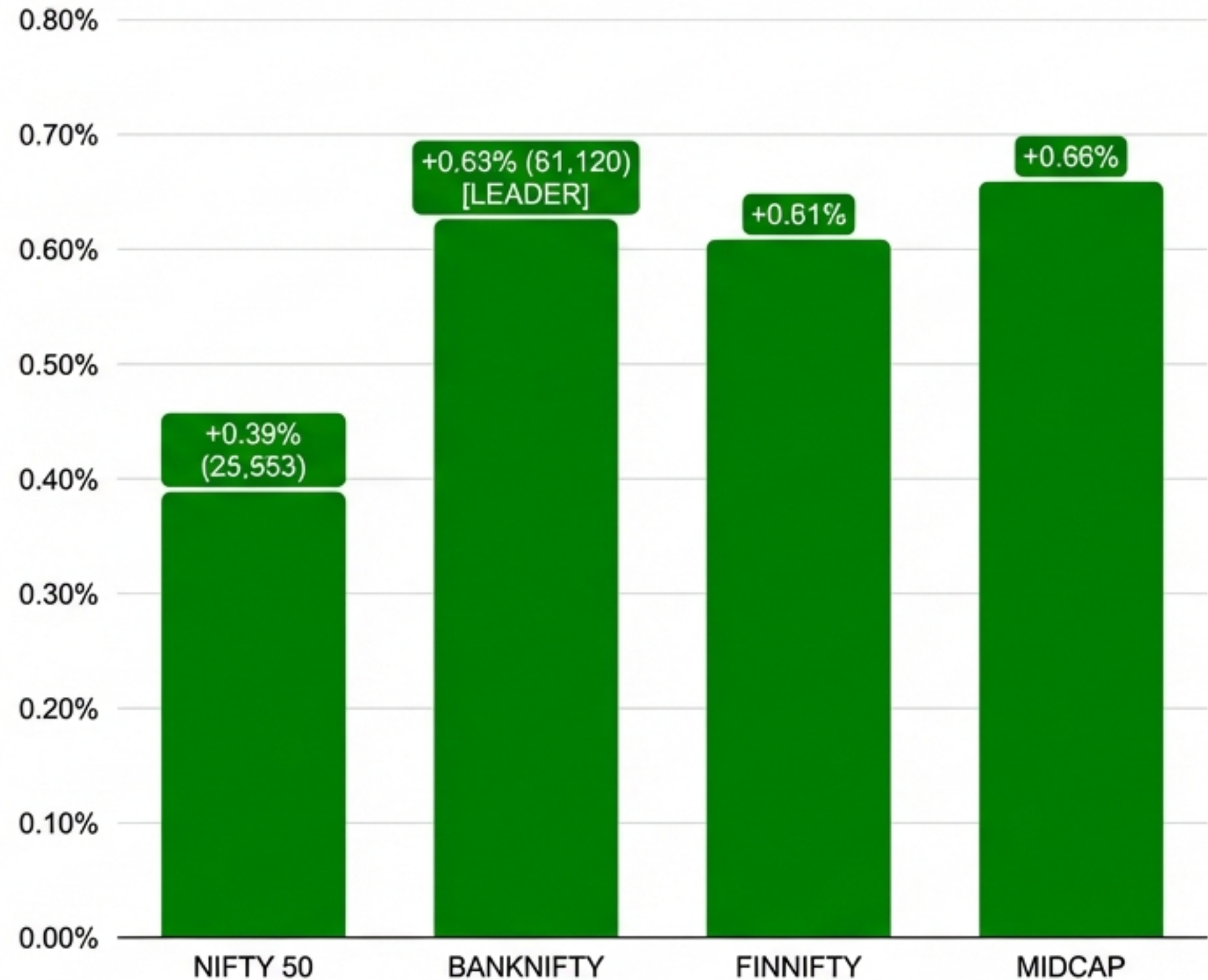
Key Insight: Structurally high volatility (VIX ~20) despite rising prices indicates 'Volatile Stabilization'. The market is mechanically hedging against upcoming policy data.

Strategic Action: Treat current rallies as tactical; tighten stop-losses.

Indian Equity Overview – Resilience in Chaos

Key Insight: India outperforms global peers, driven by Financials and Midcaps.

Analyst Insight: The rally is broad-based, but heavily reliant on the Banking sector to sustain momentum. Midcaps indicate improving domestic risk appetite.



Butterfly Chart
(Horizontal Bar Comparison)

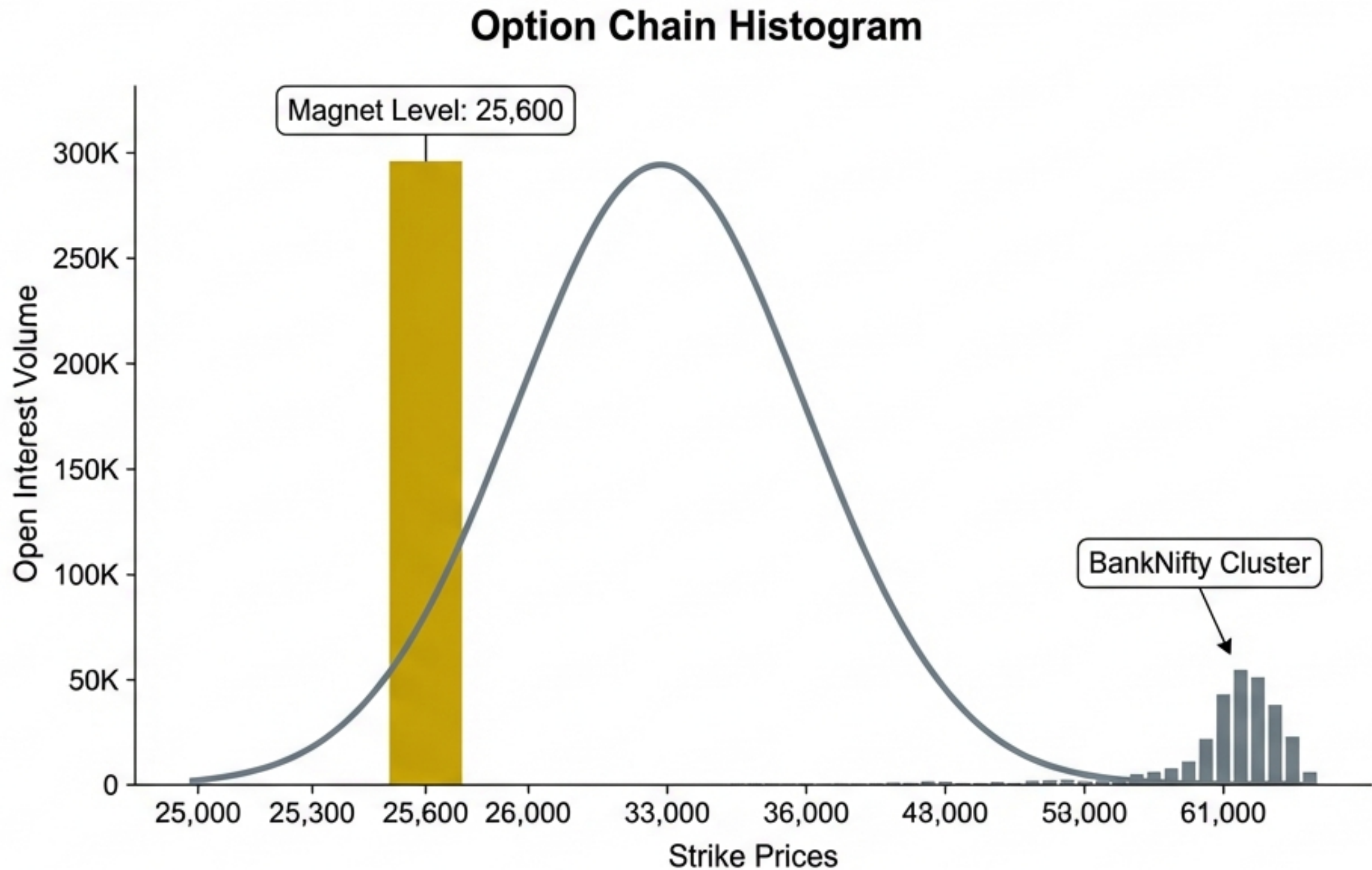


Strategic Action: Caution advised. Institutions are selling into strength to manage “Margin At Risk”.

Key Insight:
Market Makers are neutral; positioning suggests range-bound movement with volatility spikes.

- Data:**
- Magnet Level: 25,300–25,600 Strike (High Activity)
 - Implied Volatility (IV): 12–13%

Analyst Insight:
Indices likely to test the 25,600 strike to flush weak hands.





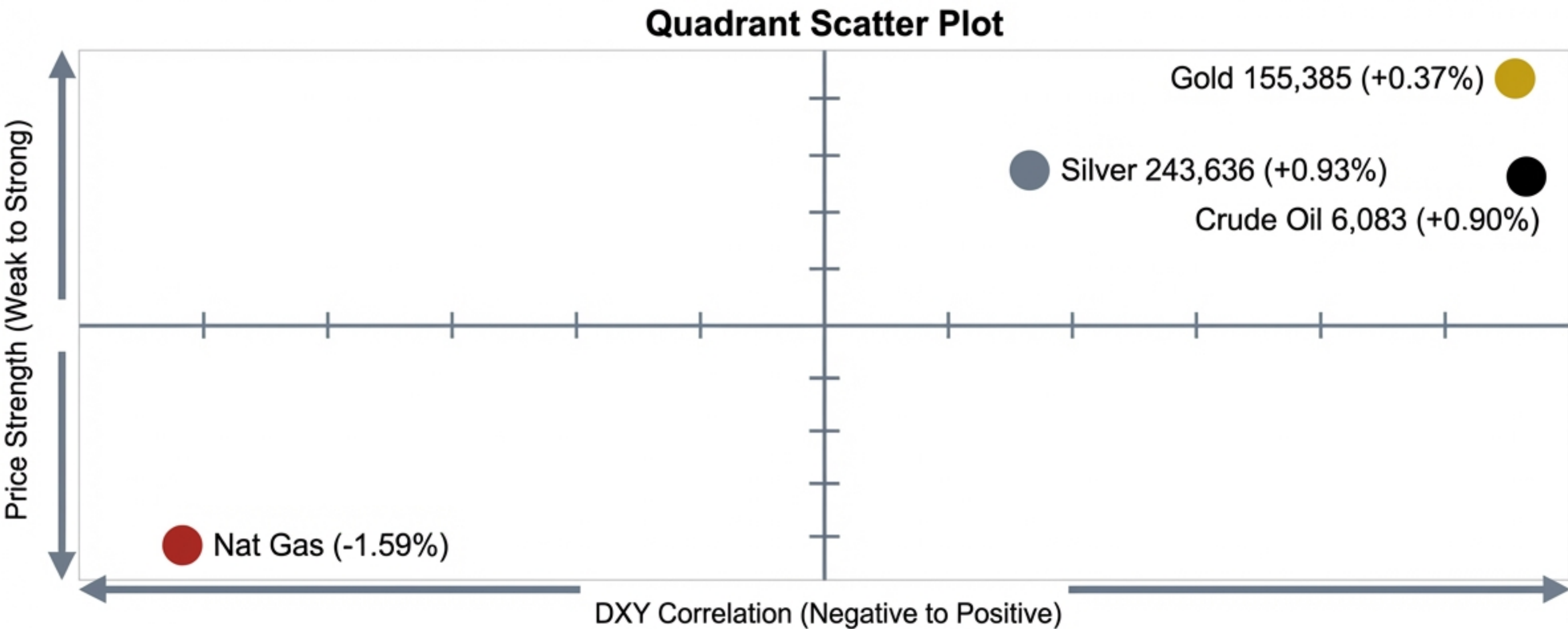
The Risk Signal:

- Rising VIX + Rising Market = Unstable Trend.
- Volatility is a functional cost of capital.

Strategic Action:

High VIX during a rally often precedes a 'Liquidity Flush'. Avoid aggressive leverage.

Commodities Radar – Inflation vs. DXY

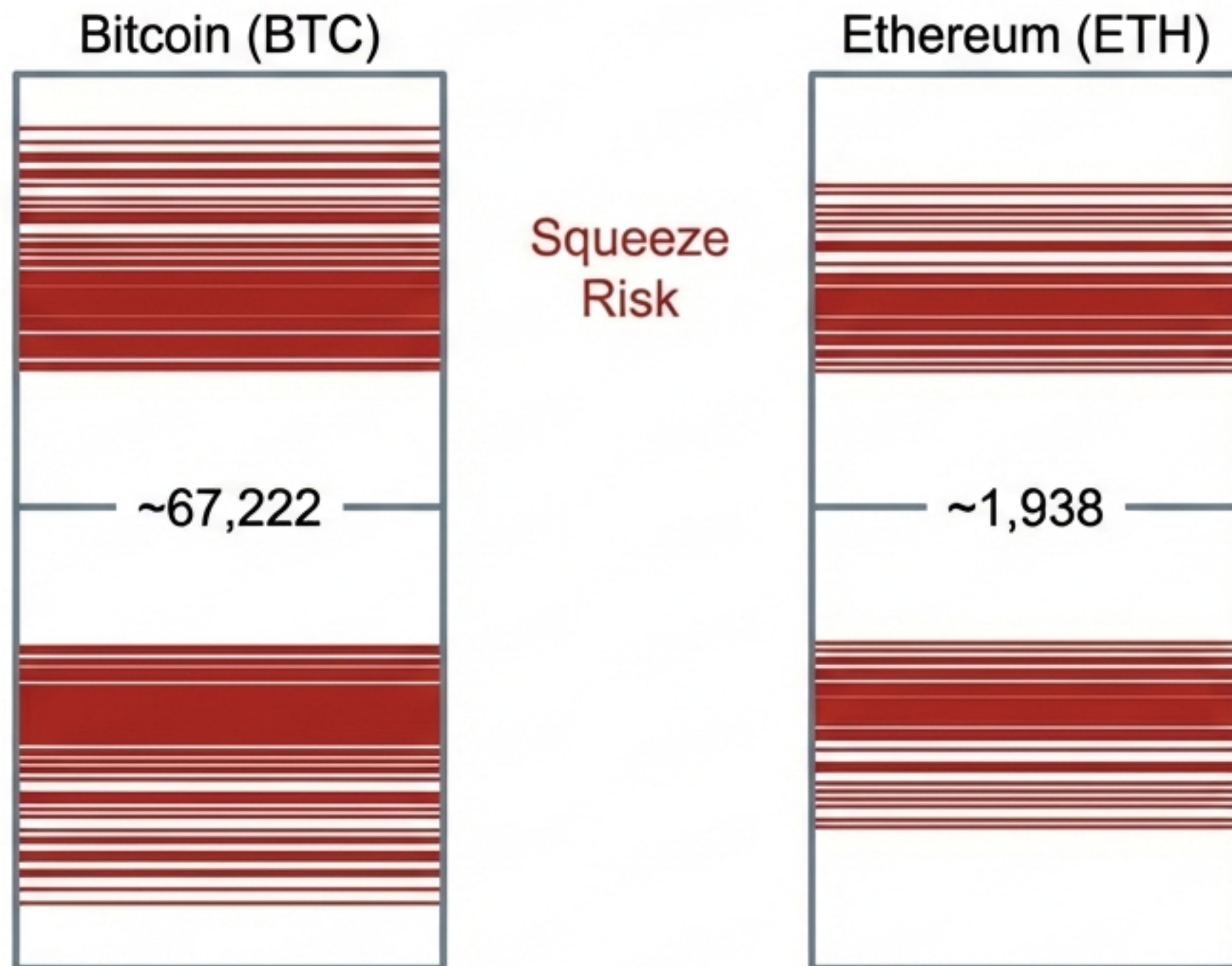


Key Insight:

Precious metals and Oil act as Inflation Hedges, resisting Dollar pressure. Natural Gas succumbs to seasonal weakness.

Crypto & Digital Assets – Liquidity Flows

Liquidation Heatmap



Key Insight:

Speculative capital active; driven by leverage rather than fundamental adoption.

Trend:

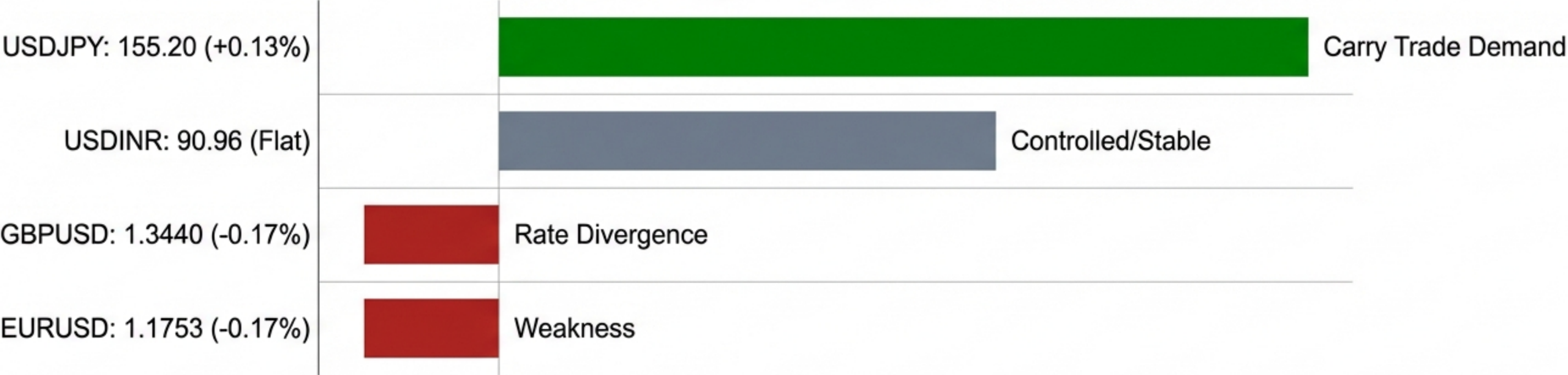
Strong / Bullish

Strategic Action:

Watch for 'Shadow Deflation' —liquidity drying up despite stable prices.

Forex Strategy – The Carry Trade

Currency Strength Meter



Key Insight: USDJPY uptick signals renewed Carry Trade demand; USD acts as the safe haven.

Analyst Insight: Rupee stability (90.96) suggests active central bank management.
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Strategic Rule: Do not buy the dip immediately when VIX spikes. Wait for institutional de-leveraging to complete.

The Event Horizon – Economic Calendar



Key Insight: Markets are in 'Waiting Mode' for policy signals.

Analyst Insight: Elevated volatility suggests markets are pricing in potential surprises from these events.

Final Synthesis & Strategic Matrix

Traffic Light Strategy Board

GO / ACCUMULATE

- South Korean Equities (Breakout)
- Indian Banking (Leadership)
- Gold (Hedge)

CAUTION / HEDGE

- US Tech (Valuations)
- USDJPY (Carry Trade)

STOP / AVOID

- Natural Gas (Seasonal Weakness)
- Unhedged F&O Leverage

Final Quote: Monitor the quality of participation, not just the direction. Liquidity and hedging provide earlier signals than headline index movements.