

GLOBAL MARKET INTELLIGENCE

NAVIGATING POST-INFLATION VOLATILITY

»»» Strategic Institutional Pivots &
The Indian Shield Defense

Date: 16th February 2026

Presenter: Senior Market Research Analyst



EXECUTIVE BRIEFING: HIGH-STAKES CALIBRATION

Insight: Global markets in 'Wait-and-Watch' mode. DXY stabilizing at 96.96 triggers risk appetite pivot.

Global Pulse Dashboard

US FUTURES



US30 +0.29%
US500 +0.25%



RESILIENT

EUROPE

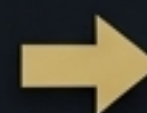


CAC 40 -0.35%



FRAGMENTED

INDIA



Nifty 50 +0.21%



DEFENSIVE
CONSOLIDATION

VOLATILITY

Global VIX
-1.06%



India VIX
+1.20%

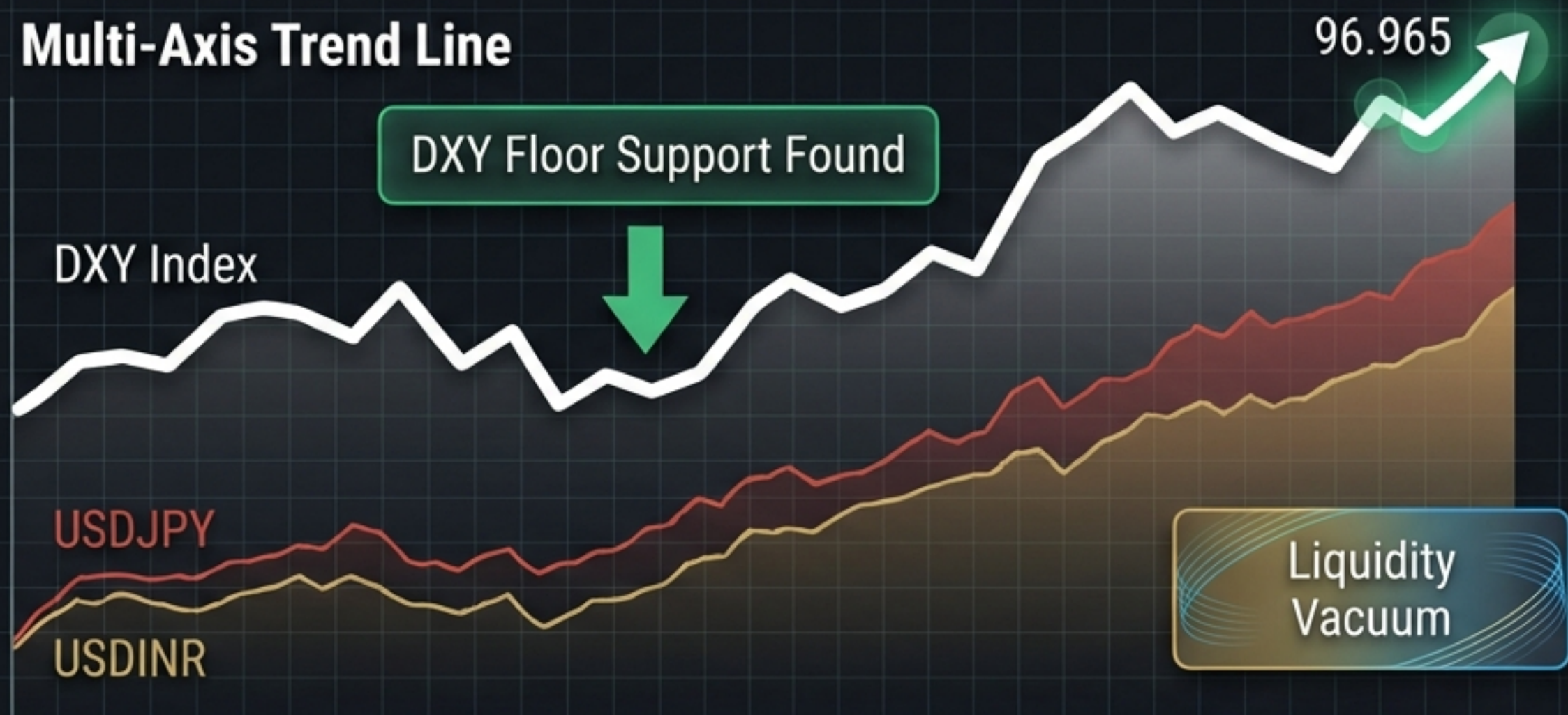


STRATEGIC ACTION: Prepare for "Volatile Stabilization".
Shift allocation from speculative assets to defensive liquidity floors.

MACRO SHIFTS: THE DXY LIQUIDITY VACUUM

Key Insight: The 'Warsh Fed' 'Higher for Longer' narrative drives Dollar resurgence, pressuring G10 and Emerging currencies.

Multi-Axis Trend Line



Analyst Note: DXY acting as a 'Wrecking Ball' for non-yielding assets.

DATA BREAKDOWN

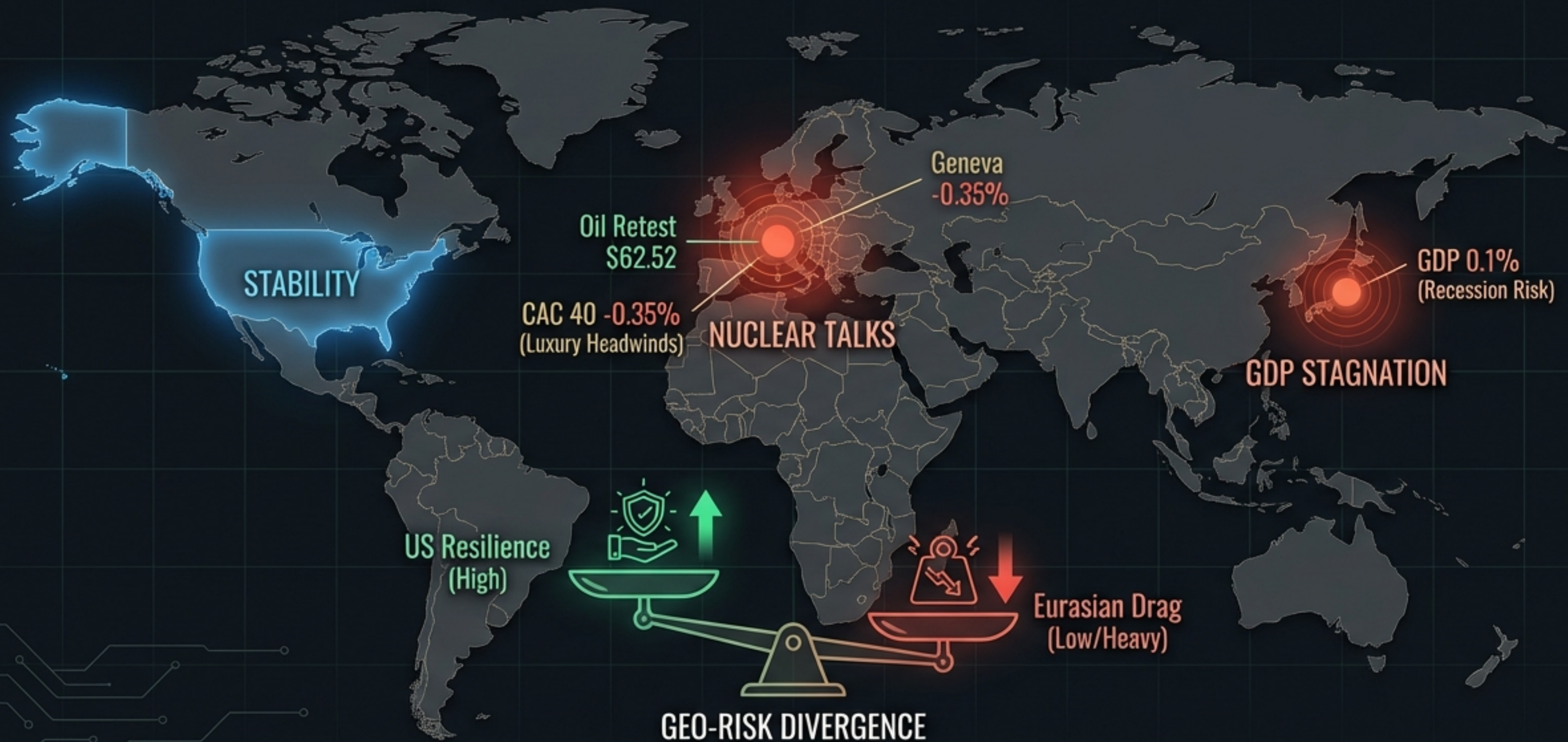
\$ DXY: 96.965 (+0.08%) **↑**

🇺🇸🇯🇵 USDJPY: +0.36% (Yen Softness) **↑**

₹ USDINR: +0.21% (Rupee Softness) **↑**

📈 US 10Y Yields: 4.05%

GEOPOLITICS: THE GENEVA-TOKYO AXIS



Strategic Action: Monitor the 'Geneva Outcome' for immediate energy sector rotation.

DOMESTIC RESILIENCE: THE INDIAN SHIELD

Key Insight: India remains an outlier with 8.2% GDP growth, utilizing domestic liquidity to absorb global shocks.

SUPPORT LEVEL CANDLESTICK CHART



Strategic Action: Accumulate Large-caps near 25,500. Structure is 'Buy on Dips'.

DATA BREAKDOWN

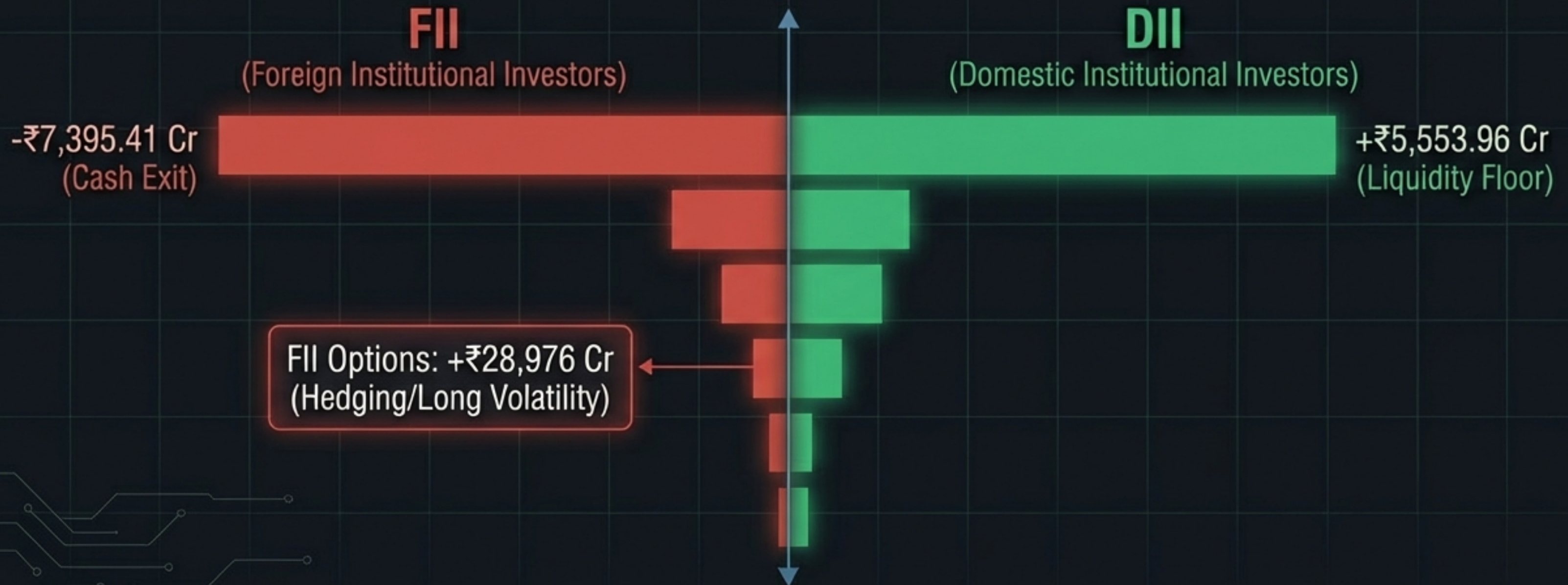
\$ Nifty 50: +0.21%
(Holding Support) **↑**

▲ BankNifty:
60,367.85 (+0.30%) **↑**

Macro Health: **↑** **↑**
IP +7.8% | Unemployment 4.8%

INSTITUTIONAL FLOWS: LIQUIDITY HANDOVER

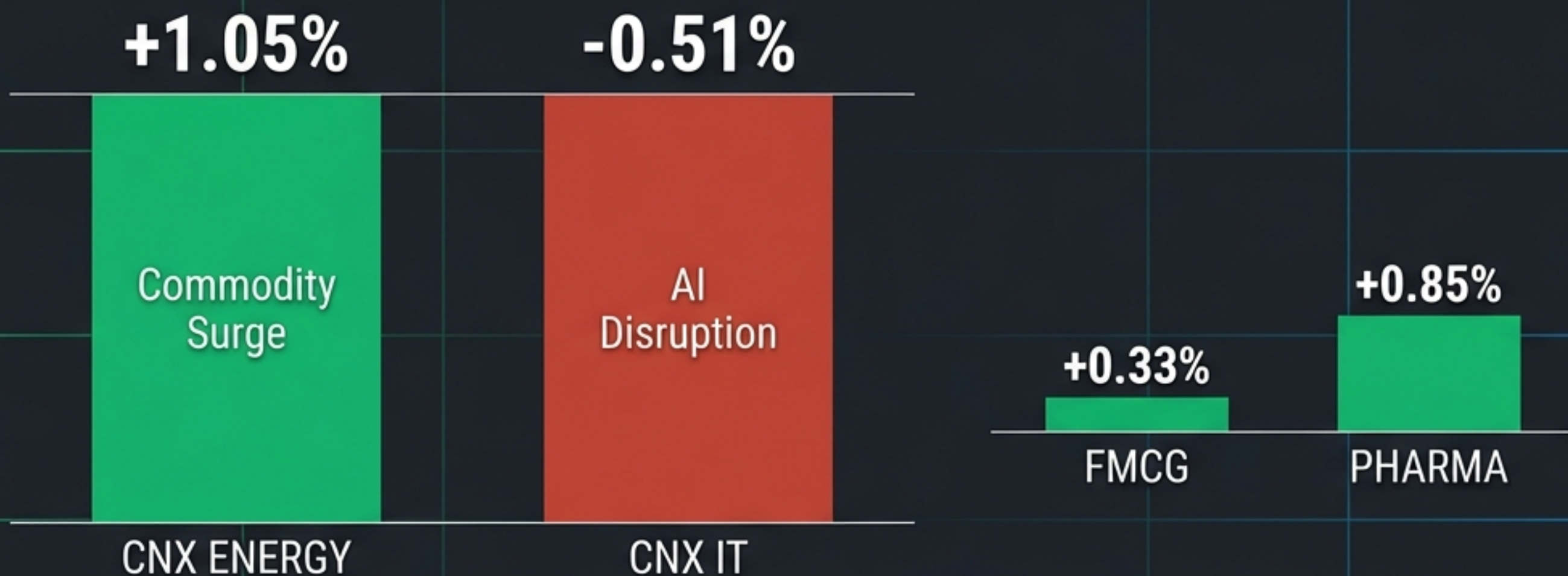
Key Insight: Historic Capital Transfer: DIIs absorbing >75% of FII selling pressure.



Analyst Insight: DIIs are the 'Volatility Dampeners'. Do not short aggressively.

SECTORAL ROTATION: OLD ECONOMY VS. AI DISRUPTION

Performance Comparison Bar Chart



Key Insight:

Capital is rotating from 'Disrupted Tech' into 'Tangible Energy'.

Strategic Action:

Overweight Energy/Commodities. Underweight IT Services until AI impact stabilizes.

STRUCTURAL THREAT: THE AI DISRUPTION THESIS

Insight: Generative AI is a deflationary force for traditional outsourcing.

Valuation Loss: ₹6 Lakh Crore wiped from sector.

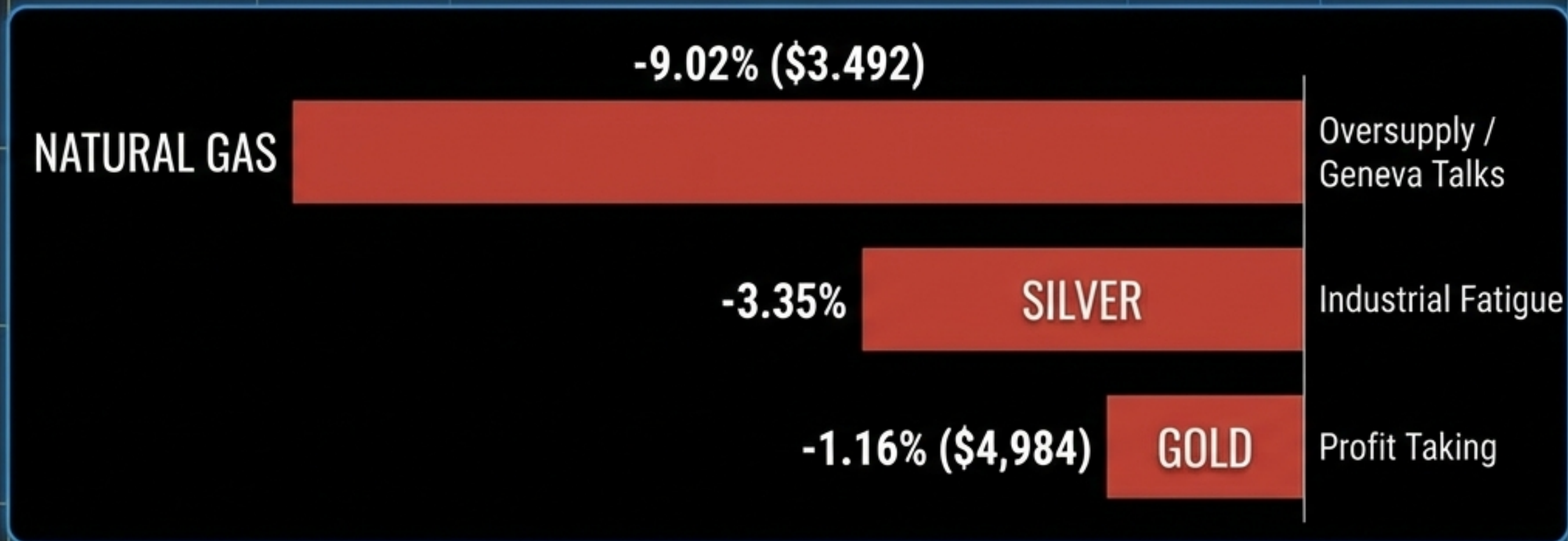
Driver: Shift from human-centric coding to AI efficiency.



Analyst Insight: Fundamental strength (Cash Flow) is being ignored for Structural Fear (Future-Proofing).

COMMODITIES: THE LIQUIDITY VACUUM

Percentage Drop Hierarchy



Key Insight:

Dollar Resurgence creates a vacuum in non-yielding assets. 'Cash is King'.

Strategic Action:

Avoid catching falling knives. Wait for DXY resistance.

DIGITAL ASSETS: NAVIGATING 'MAX PAIN'



Bitcoin Testing \$66k Support
Max Pain Short: \$69,238 | Max Pain Long: \$67,645

Analyst Insight: Standard Chartered targets cut to \$50k if SOL \$75 breaks.



F&O RADAR: THE 25,500 WALL

Open Interest Mountain



Key Insight:

Traders have built a wall at 25,500.
Upside capped by massive Call writing.

Strategic Action:

Utilize Credit Call Spreads to
capture premium decay.

FIXED INCOME: THE YIELD TRAP



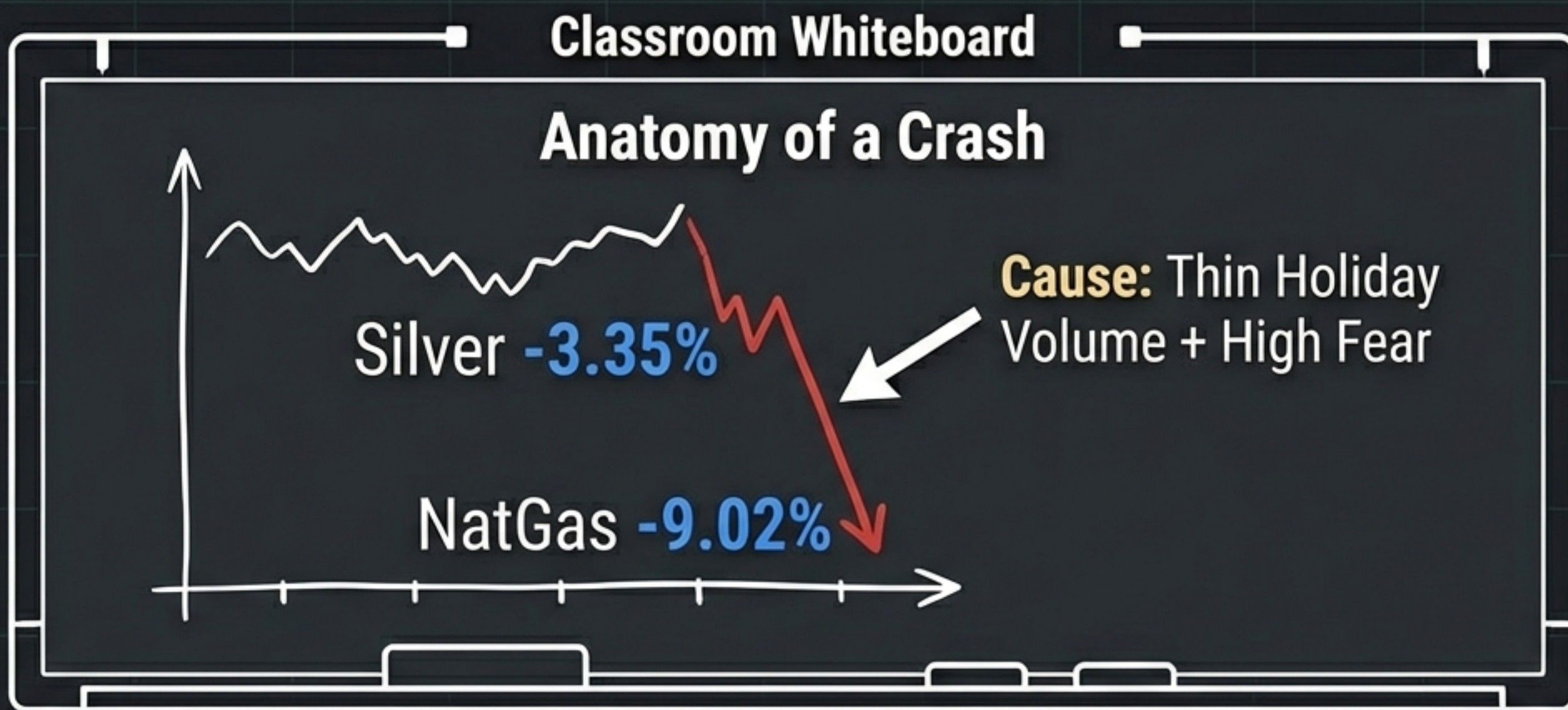
YIELD COMPARISON TABLE

	Instrument	Yield	Trend
1.	US 10Y	4.05%	Consolidating →
2.	UK 10Y	4.42%	High ↑
3.	Germany 10Y	2.76%	Low ↓
4.	US 30Y	4.694%	Steepening ↗

Key Insight: US Yields at 4.05% are the 'Gravity' holding back global equities.

Analyst Insight: Watch for US Core CPI fallout. If yields break 4.10%, Emerging Market outflow accelerates.

PROFESSIONAL TAKEAWAY: THE LIQUIDITY GAP



Lesson: "Quality of Volume" matters more than price.

Case Study: FII Exit (-₹7,395 Cr) vs DII Entry (+₹5,553 Cr).

Rule: When DXY finds a floor (96.96), cut Risk-On positions by 50%.

TECHNICAL STRATEGY: THE WATCHLIST

High-Frequency Financial Editorial



BUY ZONE

Nifty 50 @ 25,450 (Buy on Dips)
BankNifty Target: 60,800



CAUTION

Bitcoin @ \$66,000 (Liquidity Trap)
Gold Support: \$4,980



SELL/AVOID

Natural Gas below \$3.50
Don't chase breakout failures.

STRATEGIC SYNTHESIS: THE PATH FORWARD

High-Frequency Financial Editorial

Period of "Shadow Deflation". Prices high, growth fragile.

DEFEND



Utilize DII-heavy sectors
(Banking/FMCG).

MONITOR



Geneva Talks & US Inflation.

PIVOT



Rotate to
Energy/Commodities after
DXY stabilizes.

AVOID



Leveraged Crypto Longs.

Volatility is the price of admission. Solvency is the prize.