# Global Markets Intelligence: The Indo-US Pivot & February Reset

February 7, 2026

## Strategic Realignment, Institutional Calibration, and the Rise of Fiscal Oases

**ANALYST INSIGHT:**

A comprehensive analysis of the divergence between Global Volatility and Domestic Stability, driven by the CTTI alliance.

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# Executive Summary: Strategic Realignment

### GLOBAL FRICTION

Global VIX: 21.77
↑ +16.79%

HSI: -1.13%

Institutional de-risking in Eurasia. Deep price discovery.

### DOMESTIC STABILITY

India VIX: 11.94
↓ -1.9%

NAS100: +0.32%

Capital rotation into Fiscal Oases. Confidence in budget.

### SAFE HAVENS

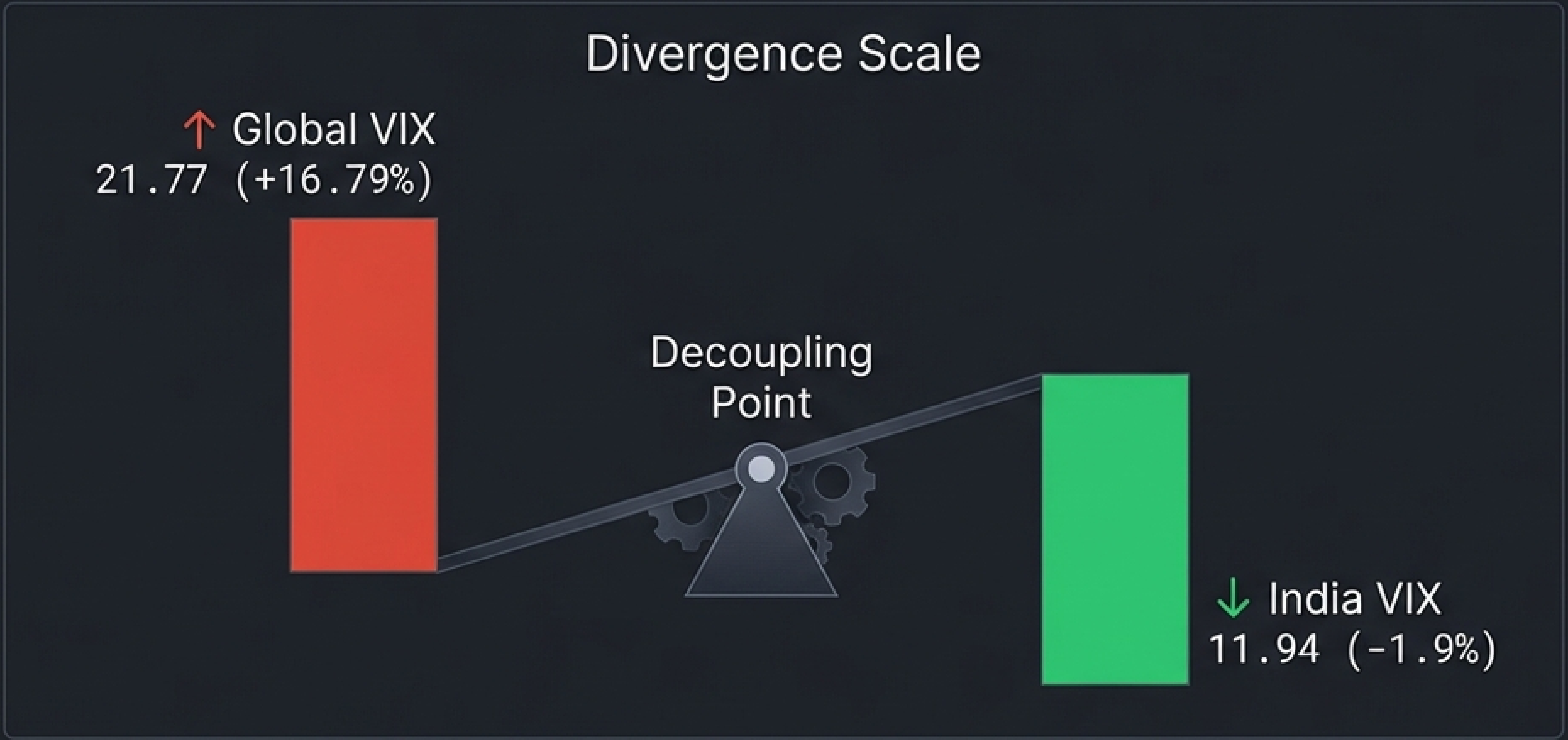
Gold: +0.87%

Silver: +2.51%

Strategic pivot to precious metals.

**STRATEGIC ACTION:** Pivot toward Safe-Haven Hedges and Trade-Beneficiary sectors.

# The Volatility Paradox: Global Fear vs. Local Greed

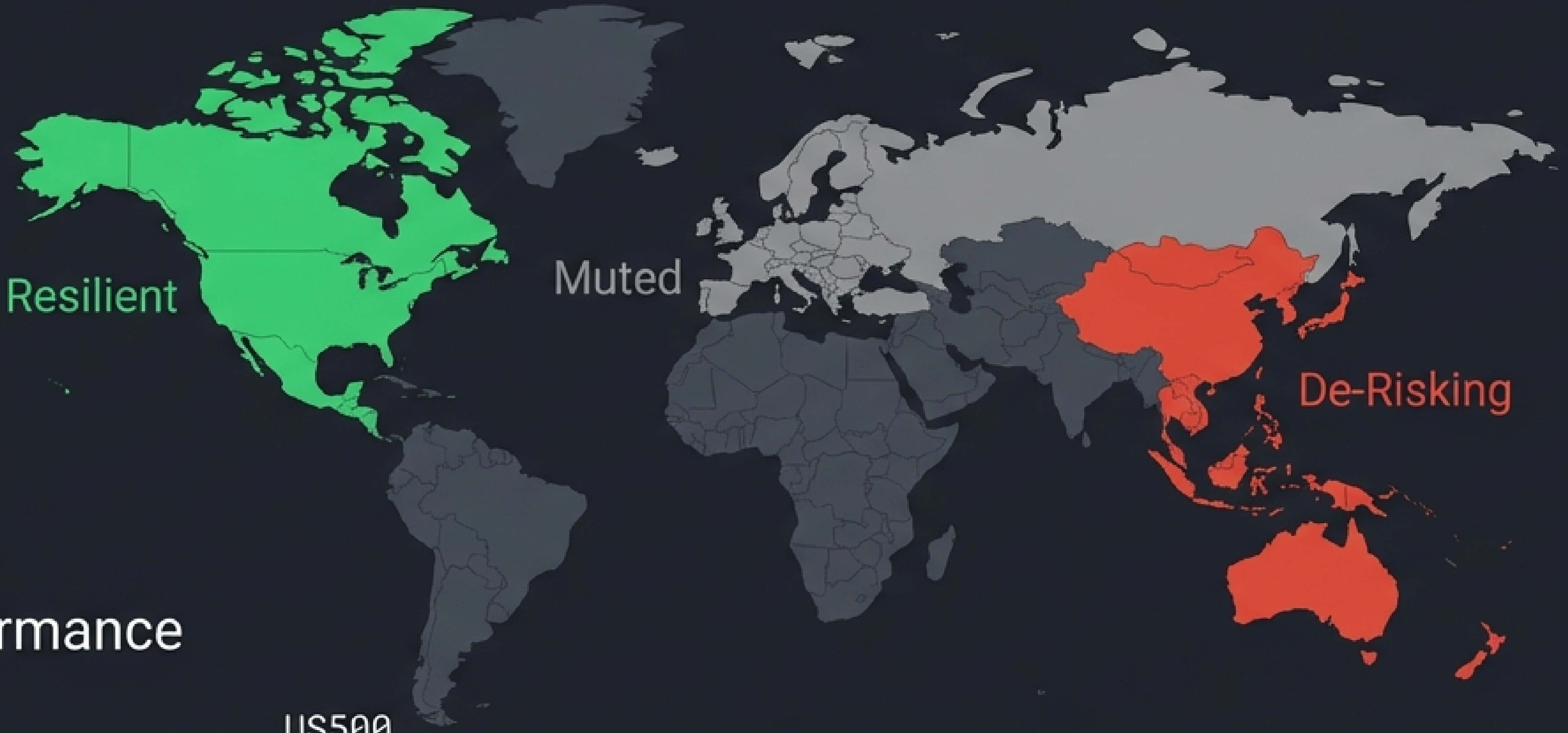


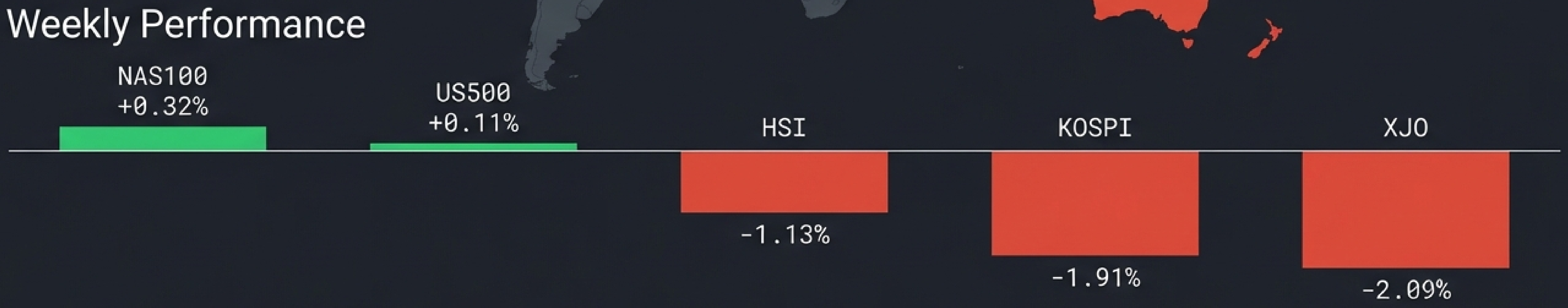

US10Y Yield:
**4.184%**

Dollar Index (DXY):
**97.85**

Key Insight: A rare decoupling of risk gauges suggests domestic insulation from global 'Shadow Deflation'. The market has absorbed the RBI's Hawkish Pause.

# Regional Flow: The Eurasian De-Risking




**Analyst Insight:** Widespread selling in Asian indices contrasts with "Volatile Stabilization" in US Indices. Avoid broad Asian exposure.

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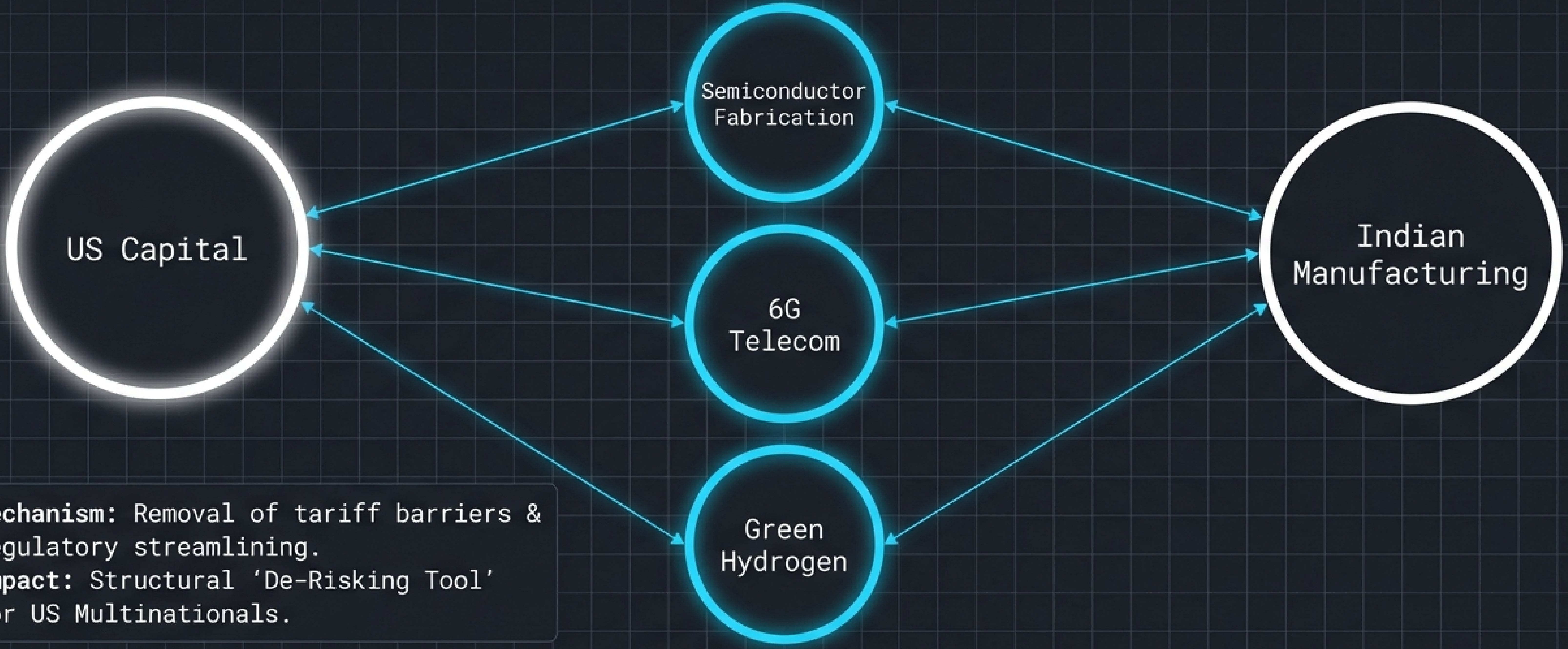
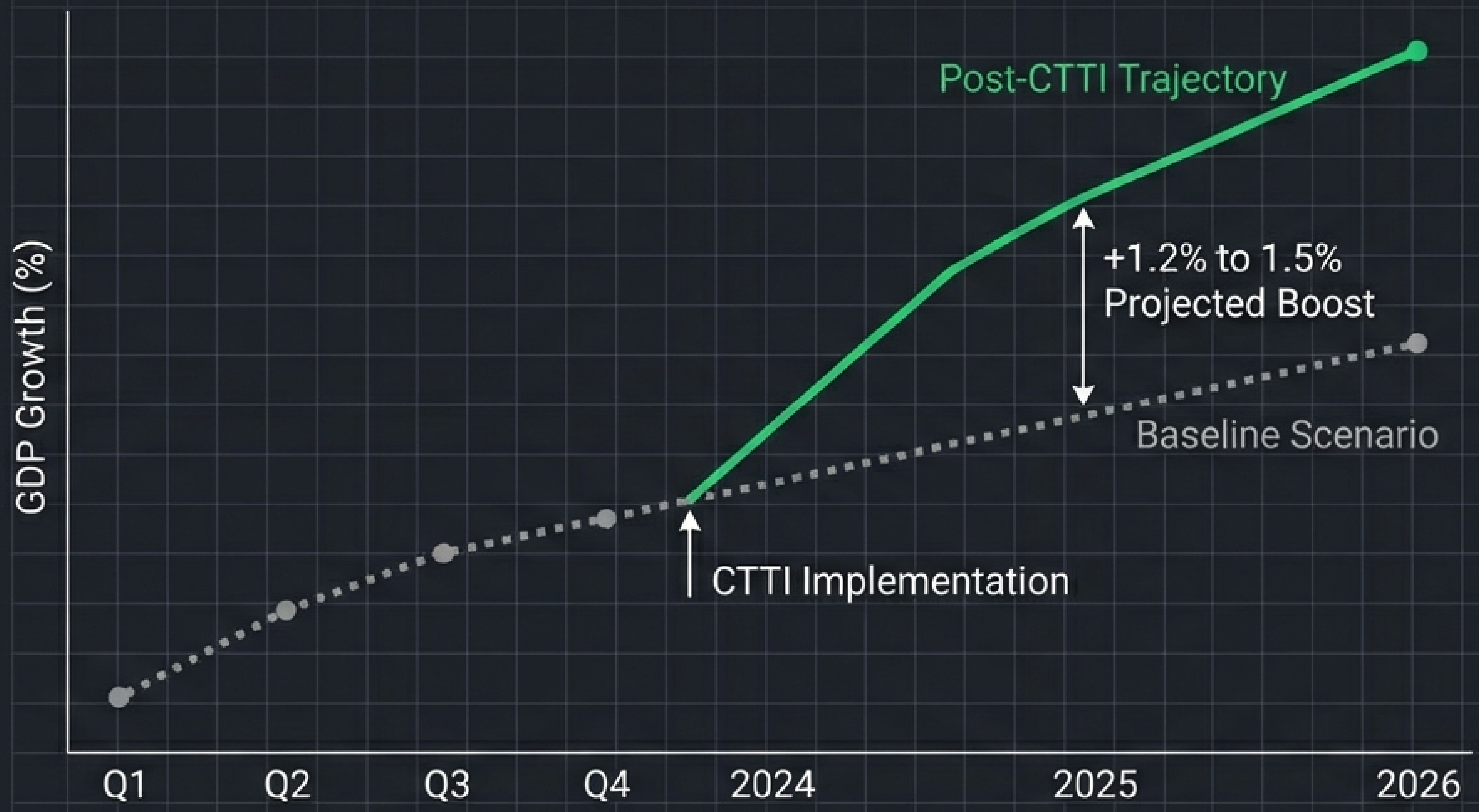
# The G2 Economic Engine: Indo-US CTTI




**Mechanism:** Removal of tariff barriers & Regulatory streamlining.
**Impact:** Structural ‘De-Risking Tool’ for US Multinationals.

Key Insight: The Comprehensive Trade & Technology Initiative (CTTI) is the primary alpha driver for February, establishing a supply chain alternative to China.

# Macroeconomic Impact: The 1.5% Boost




Currency: USD/INR

90.1975

(-0.11% Strength)

**Strategic Action:** Long positions on Indian manufacturing are now anchored by structural macro tailwinds.

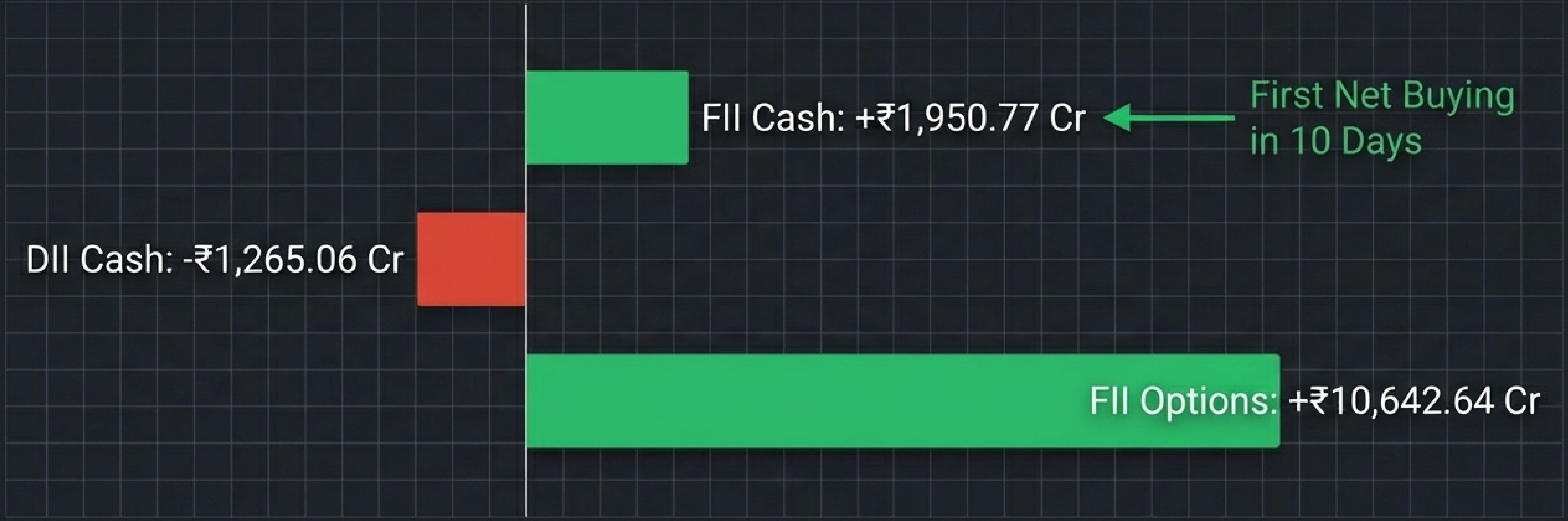
# Technical Analysis: Nifty 50 Reversal


Pattern:
Bullish Island Reversal

Status:
Consolidation Concluded

Texture:
Risk-On

# Institutional Flows: The FII Pivot




**Key Insight:** Liquidity trend reversal. FIIs return to net buying, signaling end of defensive de-leveraging.

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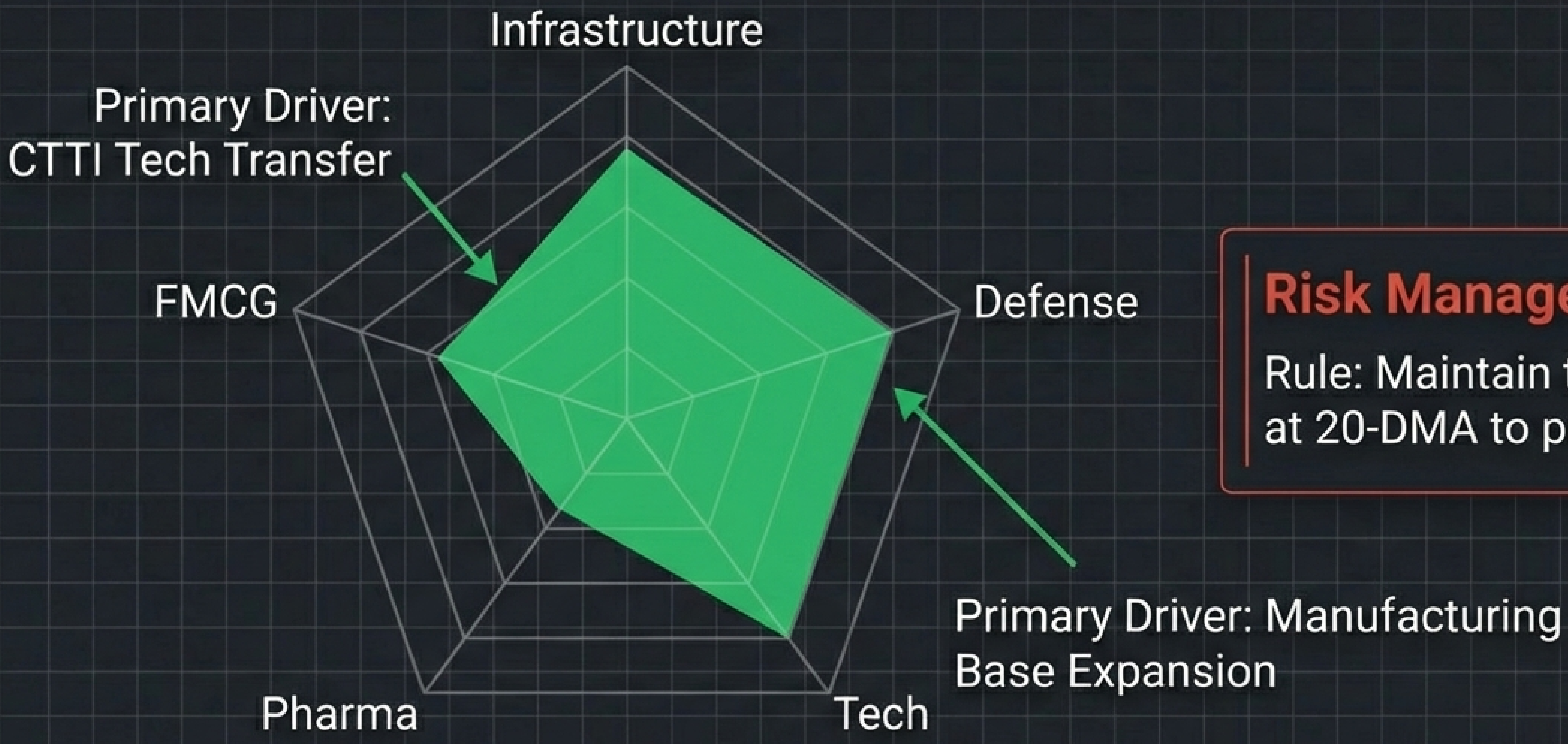
# Sector Focus: Trade-Beneficiary Growth




## Risk Management

Rule: Maintain trailing stops at 20-DMA to protect gains.

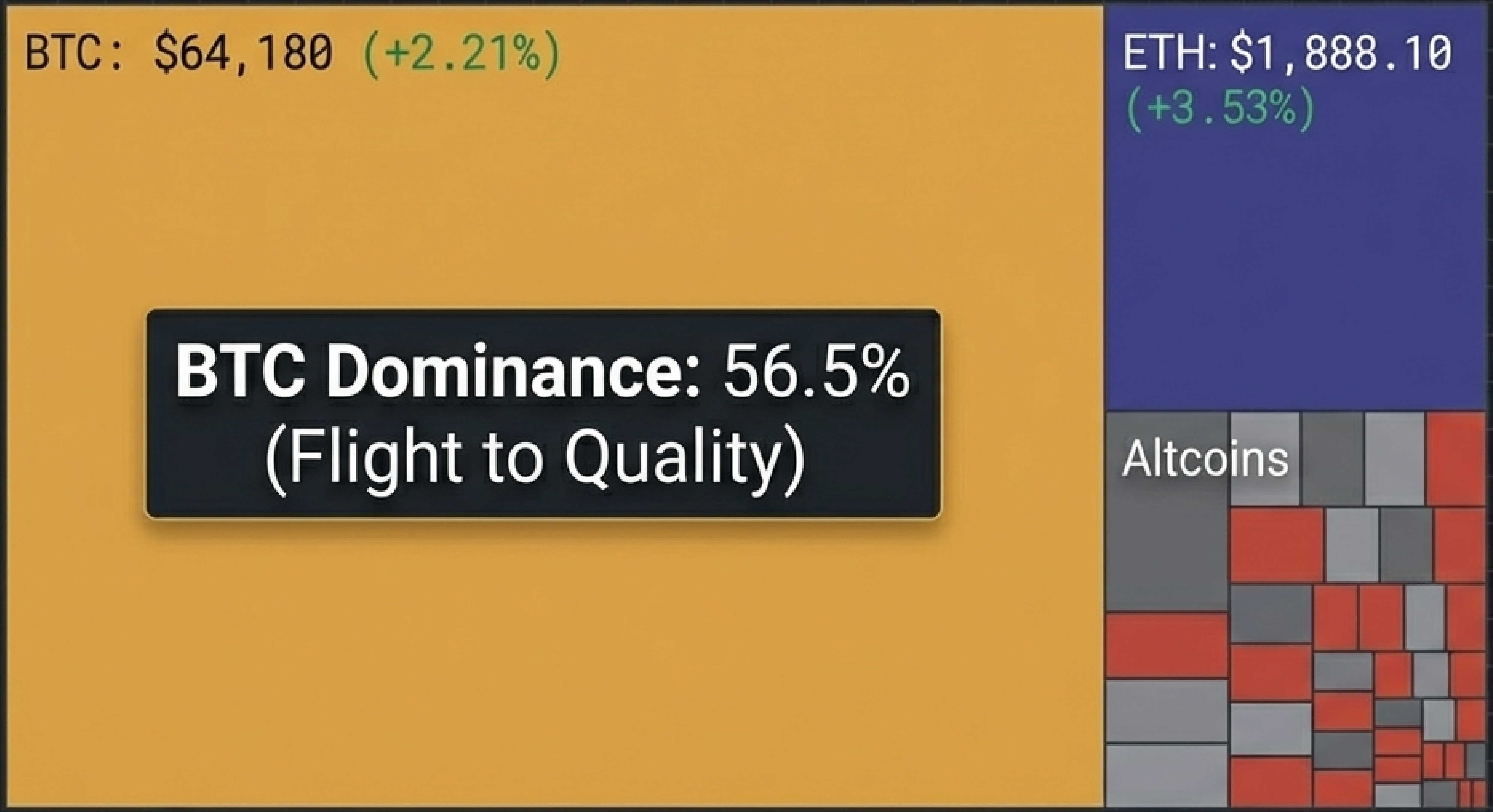
# Commodities: The Inflation Hedge


**Silver:** $72.71 (+2.51%) - **Strong Bullish**
**Crude Oil:** $63.67 (+0.81%) - Neutral

**Strategy**

Accumulate Silver for high-beta upside. Hold Gold as portfolio ballast.

# Crypto Assets: Defensive Accumulation




Institutional de-risking (ETF outflows) meets corporate accumulation.

Capital fleeing high-beta alts due to EU Tax rumors.

# Crypto Technicals: The $63.5k Floor


**Institutional Activity:** MicroStrategy adds 15k BTC.

**Network Activity:** Solana hits 300M daily transactions (AI-Agents).

**ETF Flows:** -$450M (Outflow).

**Action**

Place limit orders at support. Avoid chasing green candles until DXY stabilizes.

# Risk Calibration: The Defensive Shield


**Rules**

- **Stop-Loss:** Trailing stops on 20-DMA.
- **Hedge Ratio:** Increase Gold allocation.
- **Cash:** Wait for Dollar stabilization.

# February Bruary Outlook: The Path Ahead

- RBI Minutes (Hawkish Pause)
- US Inflation Data
- Fed Rhetoric

**Key Levels**

Resistance: Nifty 26,000

Resistance: DXY 98.00

> Market focus shifts from Policy Events to Data Validation. Expect choppy waters but upward bias for Indian equities.

# Final Takeaway: Selective Growth

- **LONG:** India Infra/Defense, Gold, Silver.
- **ACCUMULATE:** Bitcoin at $63.5k Support.
- **AVOID:** Broad Asian Indices (HSI/XJO).