

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

Institutional Calibration, Volatile
Stabilization, and Strategic Realignment

Date: February 9, 2026

Presenter: Senior Market Research Analyst Team

Strategic Realignment and Market Volatility

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Risk-Off / Western Volatility



Global VIX:
21.77

Surge of +16.79%

Helvetica Now Display

**Inflationary Pressure &
Volatility Expansion**

Roboto Mono



Fiscal Oasis / Indian Resilience

India VIX:
11.94

Cooled by -1.9%

Helvetica Now Display

**Fiscal Confidence &
Trade Deal Stability**

Roboto Mono



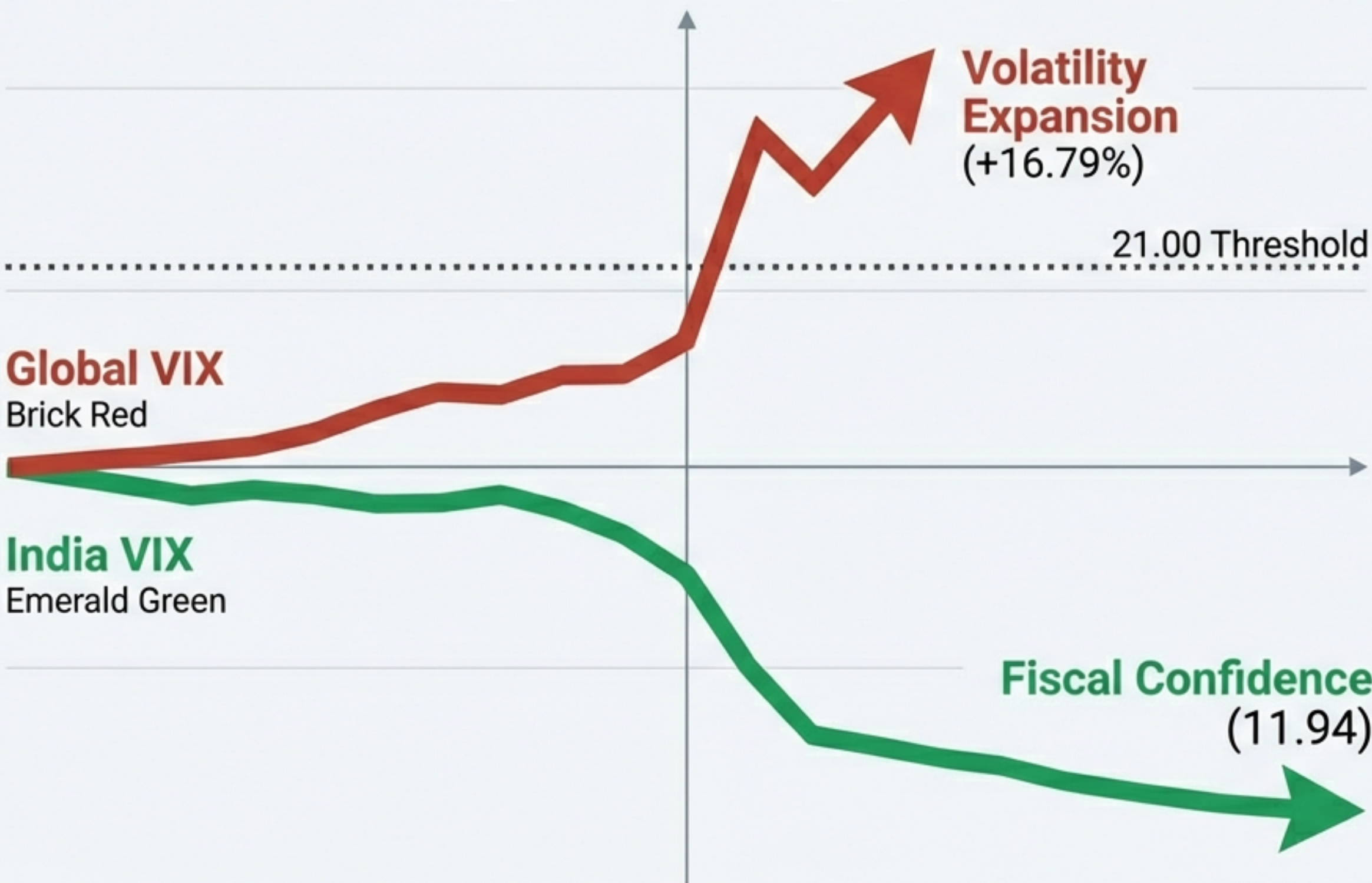
Strategic Synthesis

Key Insight: Markets are undergoing “Institutional Calibration.” Capital is rotating from high-beta Western tech into tangible growth (India) and safe-haven hedges.

Action: Adopt a “Selective Bullish” stance for the Indo-US corridor.


The Volatility Paradox: Western Fear vs. Eastern Stability

Divergence Scales Infographic



Strategic Data Panel

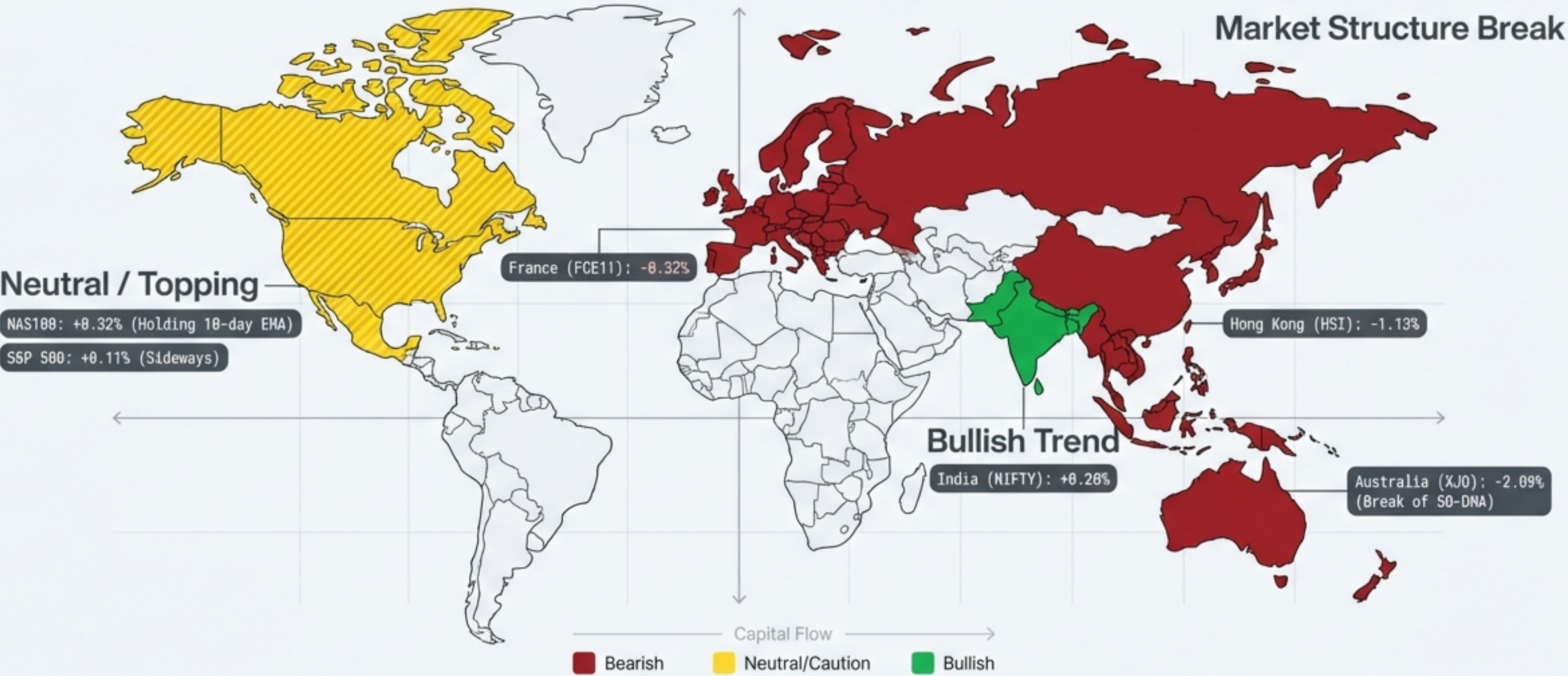
Michigan Inflation Expectation: 4% (Sticky) 

Shadow Deflation: Asset price compression in Western equities. 

Strategic Action

Reduce global position sizes by **50%** until Global VIX stabilizes below **18**.

Continental Performance Matrix



Analyst Insight: Bearish market structure confirmed in HSI and XJO. US Markets are supported by the 10-day EMA but lack momentum.

The Indian Shield: A Fiscal Oasis

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NIFTY 50:

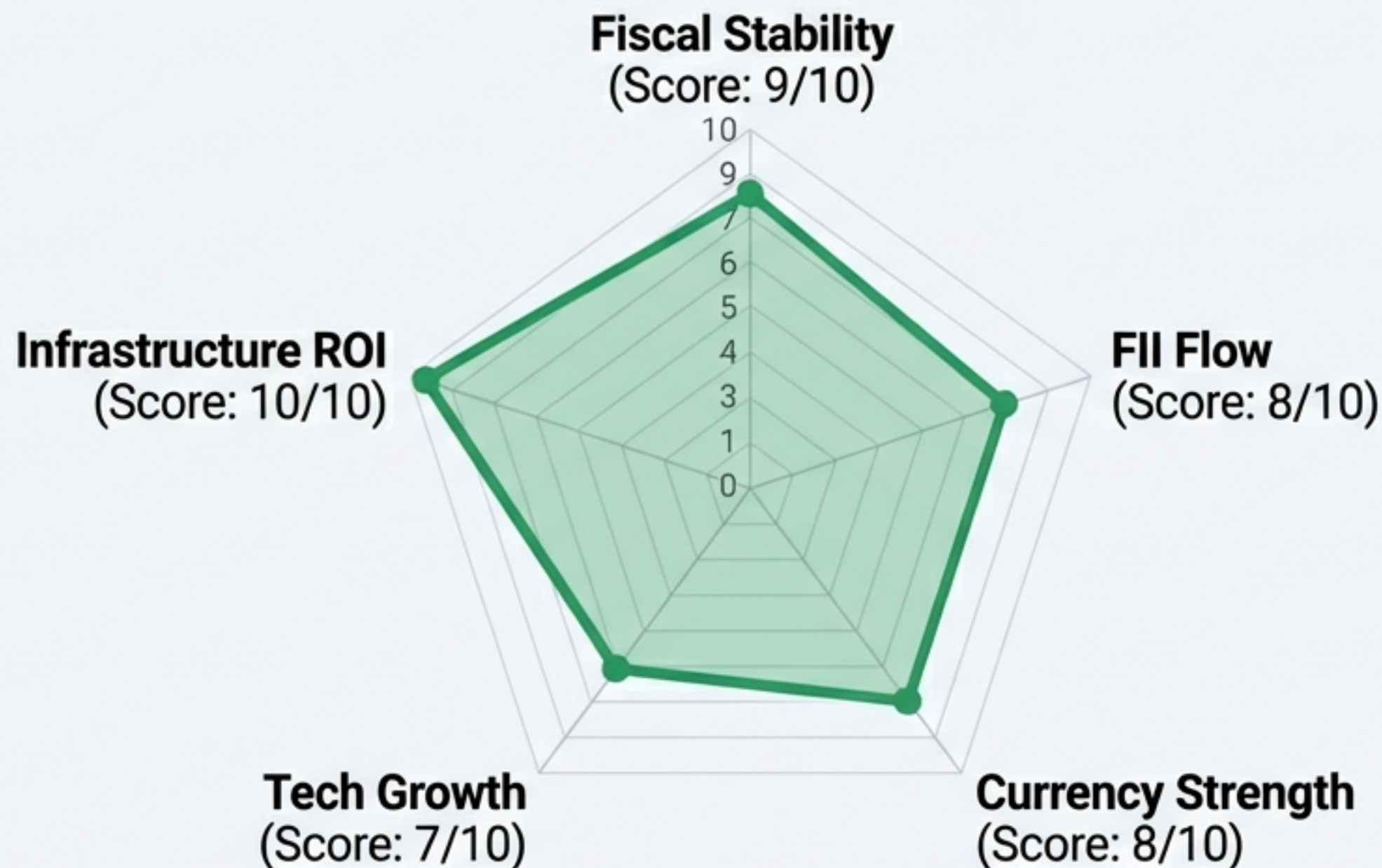
25,693.70 ↗
(+0.20%)

SENSEX:

83,580.40 ↗
(+0.30%)

USD/INR:

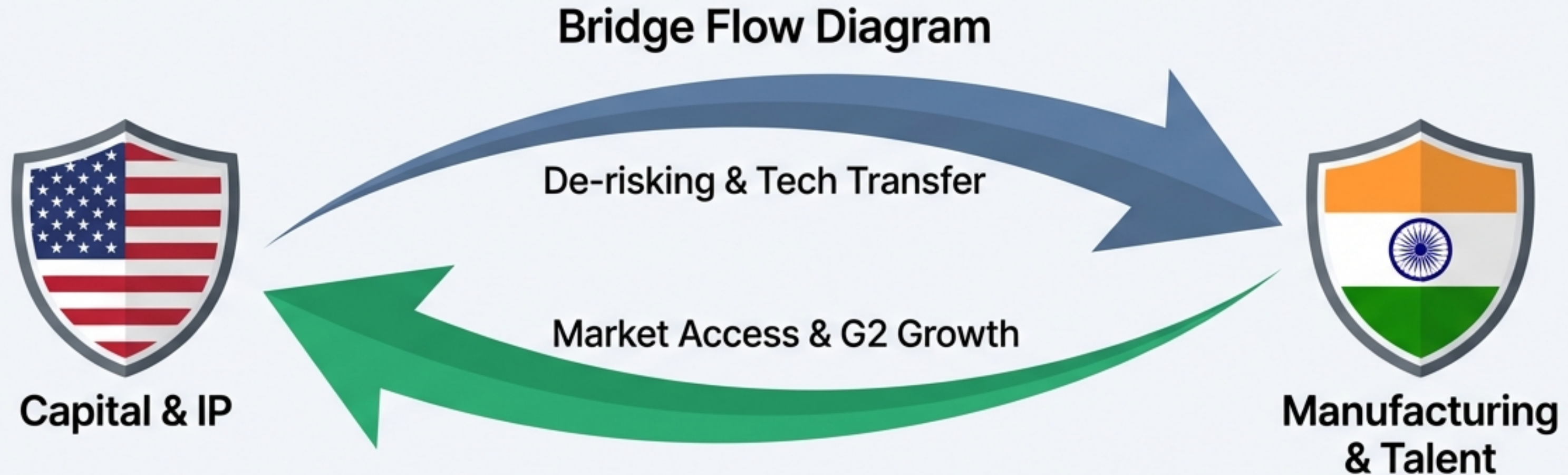
90.1975
(Outperforming EM Peers)



Key Insight Box:

India is decoupling from global volatility due to proactive budget allocations and stable terminal interest rates (5.25% priced in).

The CTTI Deal: A New Economic Pillar



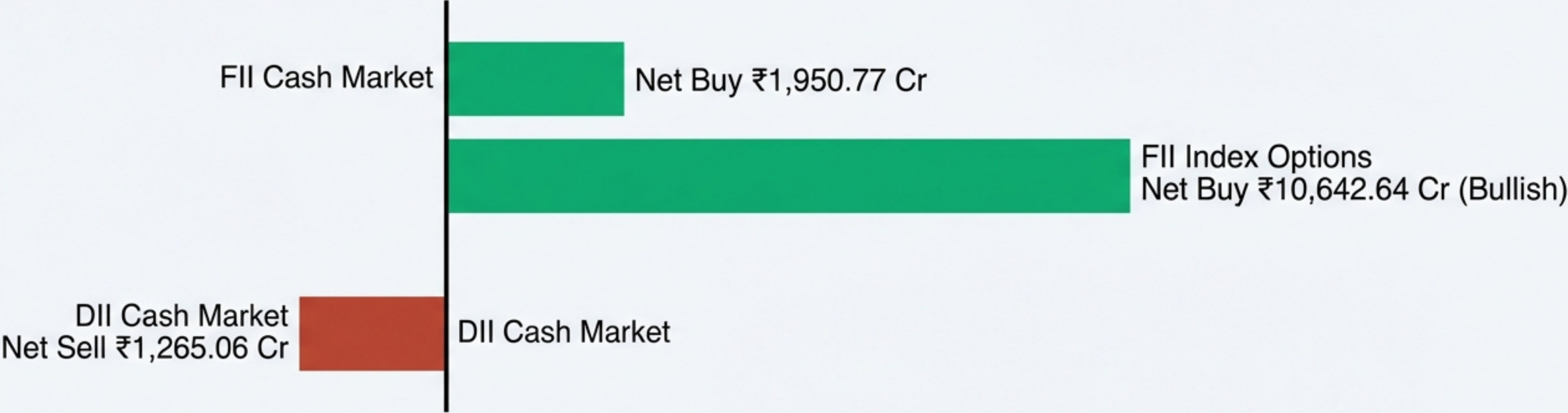
- **Comprehensive Trade & Technology Initiative (CTTI)**

- Key Sectors: Semiconductor Fabrication, Green Hydrogen, 6G Telecom.
- Economic Impact: Estimated +1.2% to 1.5% addition to India's GDP (Medium Term).

Analyst Note: Fundamental re-rating event for the Rupee. US firms secure a high-growth manufacturing alternative.

Flow Dynamics: The Return of Foreign Capital

Horizontal Bar Comparison

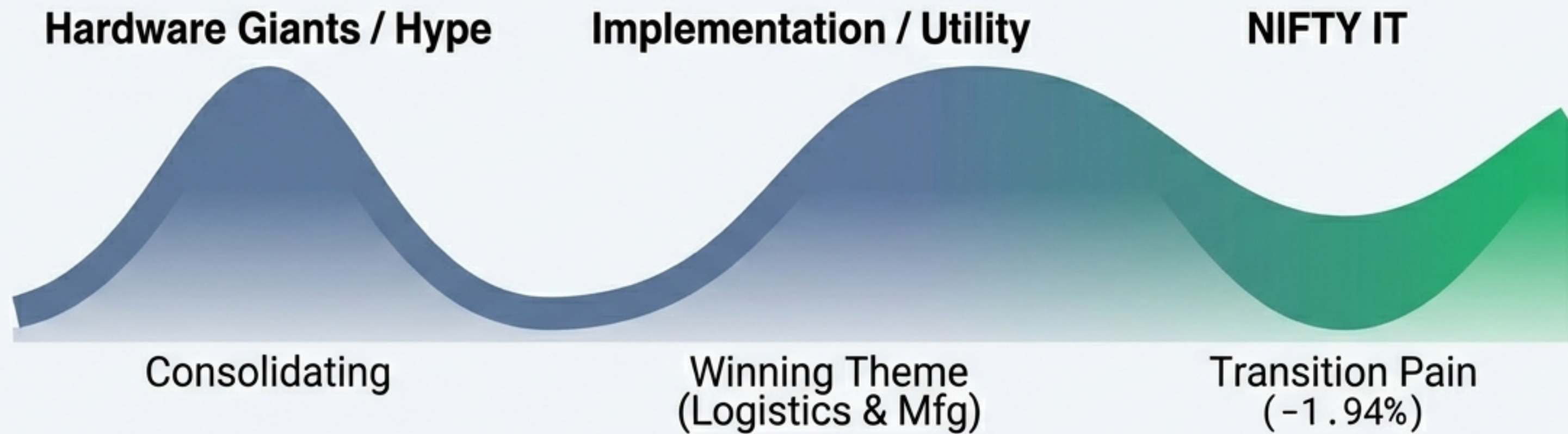


Trend Reversal: FIIs have flipped to net buyers, ending a week of defensive de-leveraging.

Strategic Action: Follow the smart money into large-cap liquid stocks. High options volume suggests confidence in upside continuation.

Alpha Generation: The AI Implementation Wave

Sector Lifecycle Curve

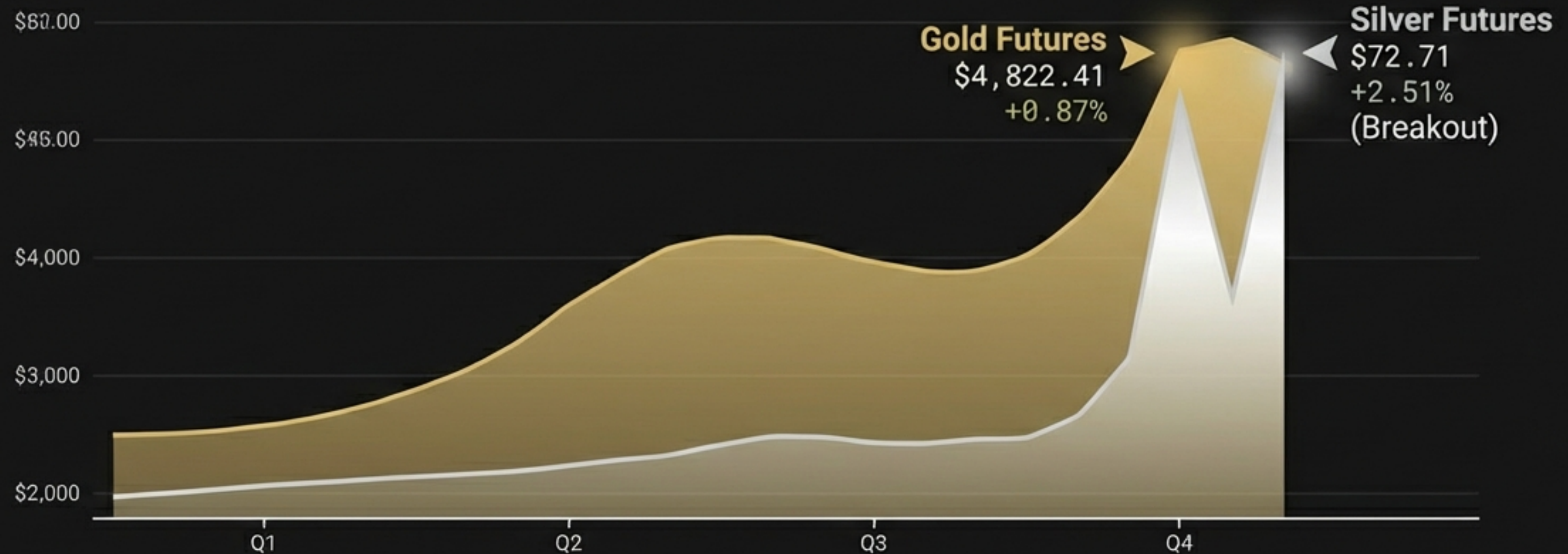


- Lagging Sector: NIFTY IT down -1.94%.
- Winning Theme: Expanding P/E ratios in firms integrating AI-Agents.

Strategy: Rotate from Hardware to Utility. Focus on 'Tangible Growth' companies.

Commodities: The Tangible Safety Hedge

Twin Peak Area Chart



Insight: Institutional desks are hedging US policy uncertainty by bidding up precious metals.

Action: Portfolio Stabilizer against government shutdown jitters.

Digital Assets: Defensive Accumulation

Bitcoin Candlestick Chart



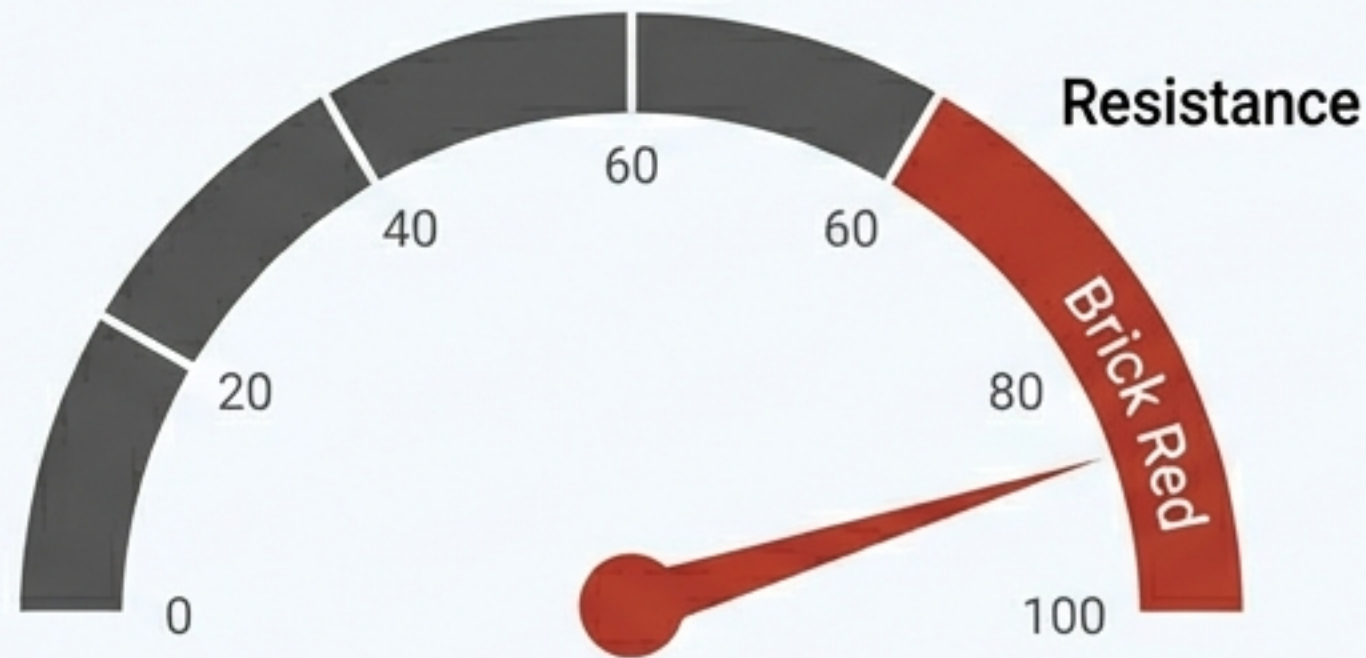
Data Grid

- **Bitcoin:** \$64,180 (+2.21%)
- **BTC Dominance:** 56.5% (Flight to Quality)
- **Inst. Activity:** \$450M ETF Outflows (De-risking)
- **Solana:** 300M Daily Txns (AI-Agent Driven)

Risk Alert:
EU Tax Risk: Proposed 25% tax on unrealized gains affecting sentiment.

Forex Dynamics: Dollar Resistance vs. Rupee Strength

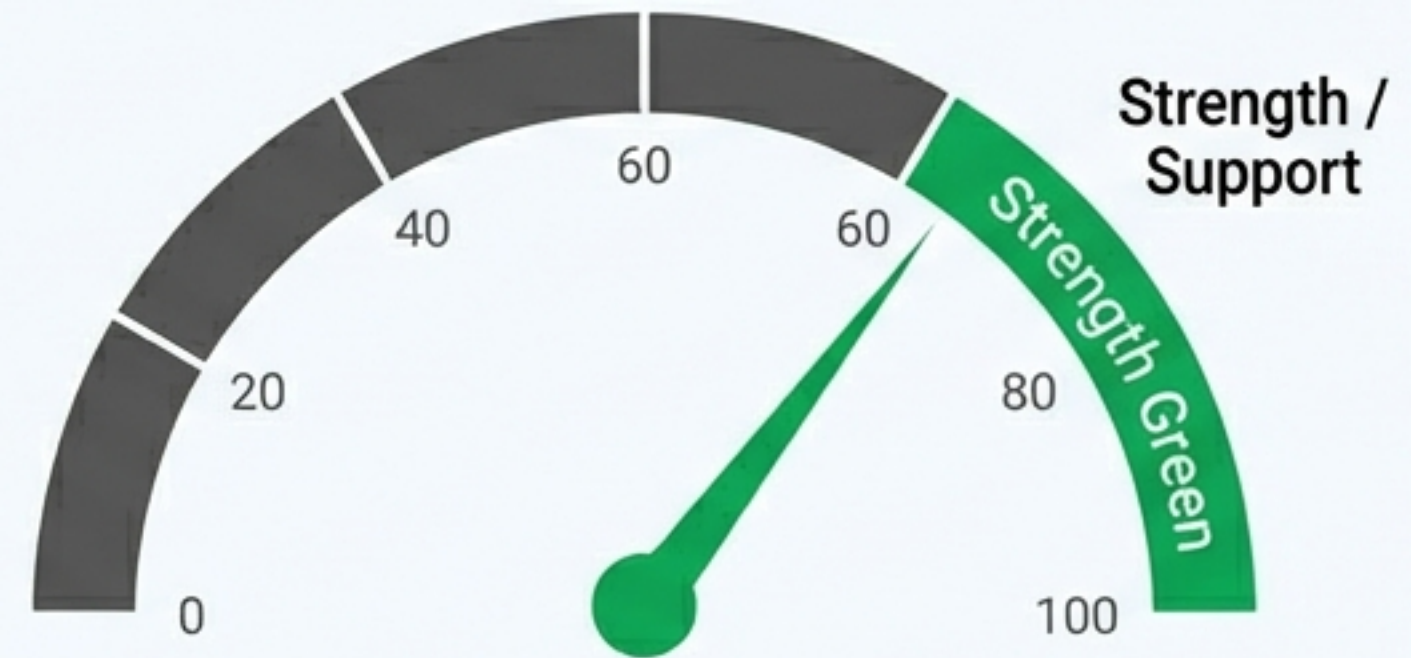
Dollar Index (DXY)



97.85 (-0.10%)

At Resistance (98.00)

USD/INR



90.1975 (-0.11%)

Strength / Support at 90.00

Analyst Insight: The Dollar is hitting a technical ceiling. If DXY drops below 96.80, expect a significant relief rally in Bitcoin and Emerging Markets.

Critical Event Watchlist

Calendar Timeline

Feb 9



RBI Decision:
5.25% (Status Quo)

Feb 9



Michigan
Sentiment: 55
(Miss)

Feb 12



CPI & IIP Data
Release

Context Box:

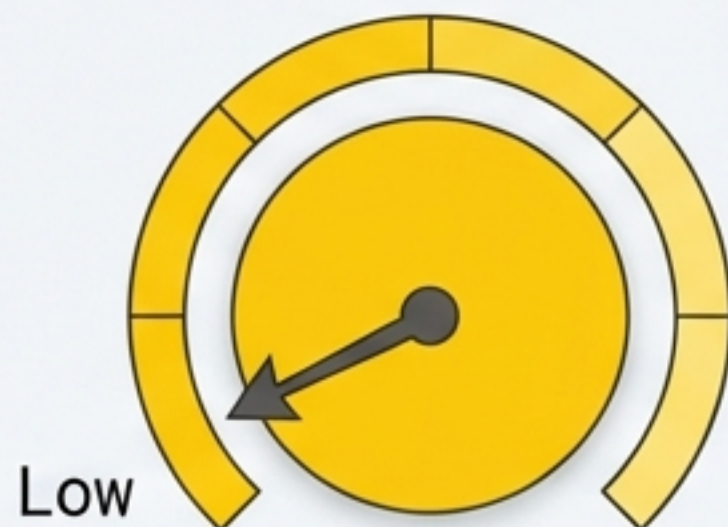
- **USA:** Fed Balance Sheet elevated at 6.61T.
- **Strategy:** Monitor Feb 12th data closely for confirmation of the Indian inflation cooling narrative.

Technical Levels & Market Bias

Support/Resistance Table				
Asset	Current Level	Trend	Key Support	Bias
NAS100	24,403	Bullish	10-Day EMA	Fragile
NIFTY 50	25,693	Bullish	20-Day EMA	Strong
Gold	\$4,822	Bullish	\$4,800	Safe Haven
Ethereum	\$1,888	Bullish	\$1,850	Momentum
HSI (Hong Kong)	26,580	Bearish	50-Day MA (Broken)	Negative

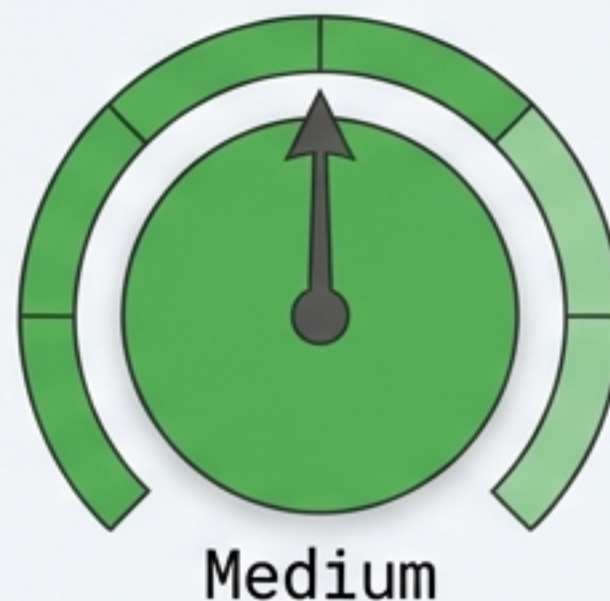
Risk Architecture: Protecting the Downside

Leverage



Reduce Global Exposure

Cash Levels



Dry Powder Ready

Hedging



Gold/Silver Hedges Active

Rules:

- Rule 1: Maintain trailing stops for Indian Infra stocks at the 20-DMA.
- Rule 2: Reduce global equity position sizes by 50%.
- Rule 3: Bearish signal for equities if DXY holds above 98.

The February Outlook: Institutional Re-Balancing

Macro

**Divergence
favors India
& Safe
Havens.**

Trade

**Buy “Trade-
Beneficiary”
sectors
(Infra/Defense).**

Crypto

**Defensive
Accumulation
at support
(\$63.5k BTC).**



**Stay Long on Tangible Growth.
Hedge the Global Volatility.**