

GLOBAL MARKET INTELLIGENCE

STRATEGIC INDO-US SYNERGY & INSTITUTIONAL REBOUND



Weekly Strategic Analysis | February 10, 2026

Capital is rotating from Western uncertainty to Eastern fiscal oases.

EXECUTIVE SUMMARY: THE STRUCTURAL REALIGNMENT

INDIA GROWTH



Nifty Rebound:
+0.70% ▲



FII Inflow:
+₹2,255 Cr ▲

US CONSOLIDATION



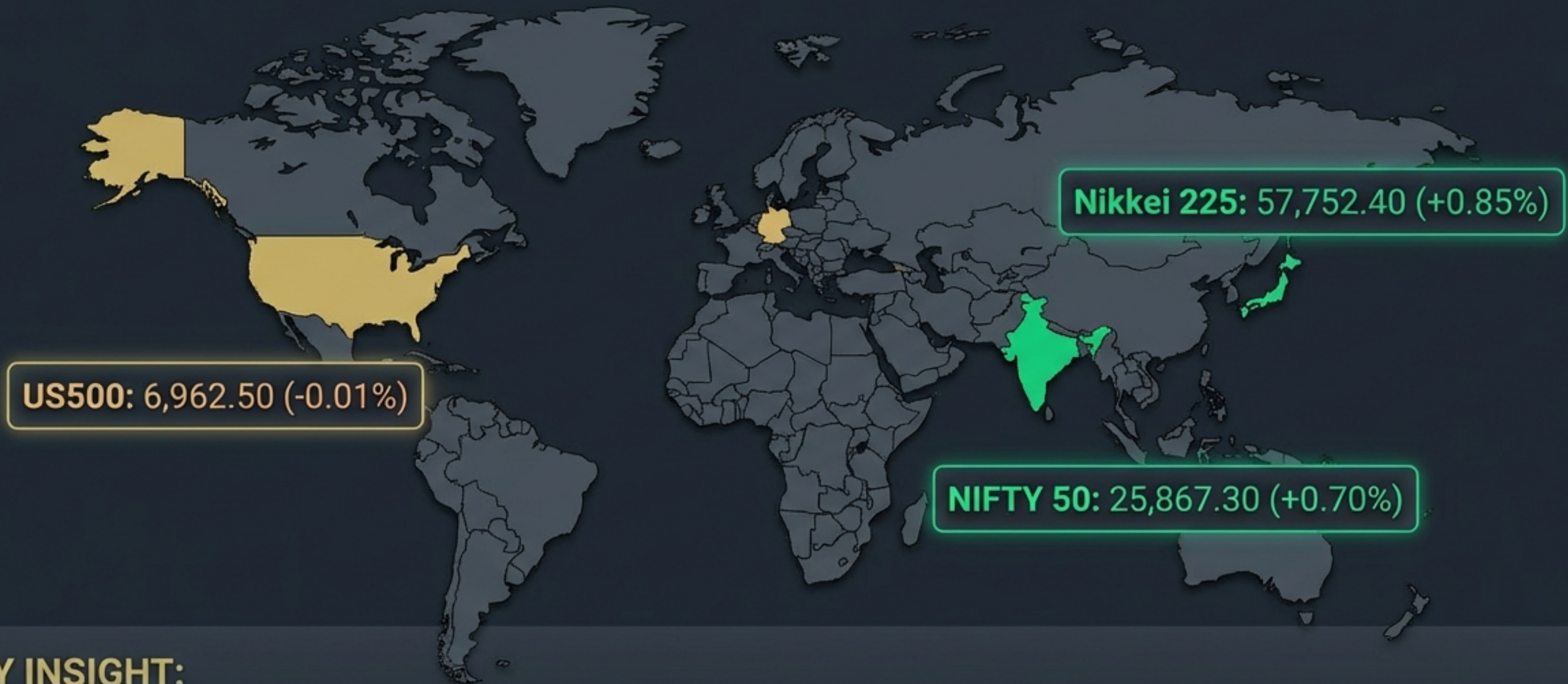
Indo-US Deal:
+1.5% GDP Impact ▲



ANALYST INSIGHT:

We are witnessing a fundamental 'Risk-On' sentiment shift anchored by long-term fiscal prudence rather than short-term speculation. The Indo-US Comprehensive Trade & Technology Initiative has re-rated the economic corridor.

GLOBAL MACRO DASHBOARD: THE HEATMAP



KEY INSIGHT:

Divergent market behaviors as Asia surges while the West consolidates.

STRATEGIC ACTION: Monitor the DXY pivot at 97.20 for global risk appetite confirmation. Europe remains rangebound (FDAX -0.05%) due to industrial lag.

AMERICAS: TACTICAL CONSOLIDATION & POLICY DRAG

RESISTANCE BARRIERS

S&P 500: Flat at 6,962.50

Nasdaq: Testing 10-day EMA (25,242.70)

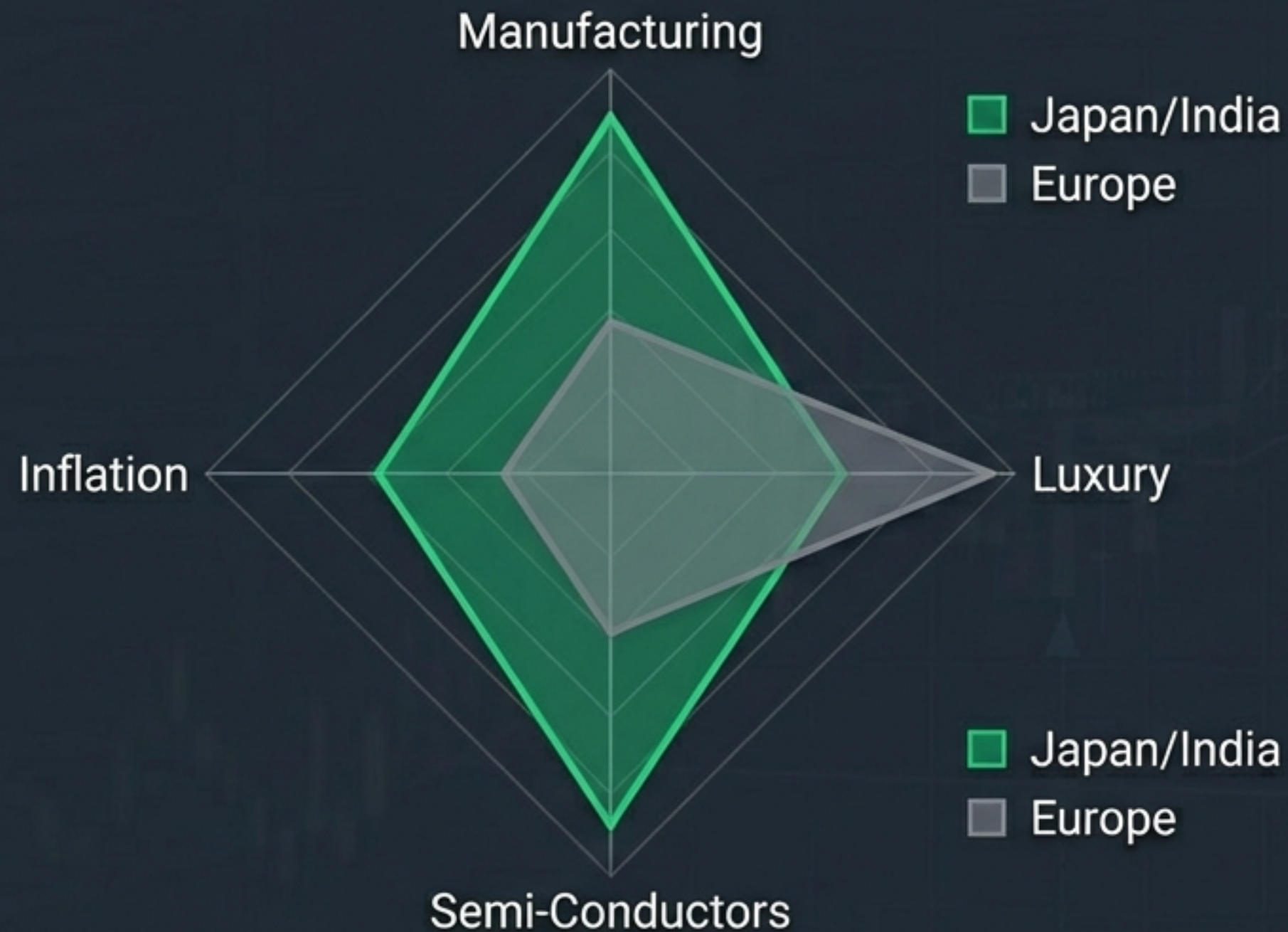
Event Risk: US Government Shutdown
("Shock of the Month")

Divergence Scale



ANALYST INSIGHT: The market is pricing in "High Terminal Rates" under the new "Warsh Fed," prioritizing labor defense over inflation targets.

EURASIA: THE NIKKEI PARABOLA & LUXURY SUPPORT



Nikkei 225: **+0.85%**
(Parabolic Surge)

France (FCE1): **+0.59%**
(Luxury Rebound)

Germany (FDAX): **-0.05%**
(Industrial Lag)

STRATEGIC ACTION: Long positions favored in Asian manufacturing over European industrials.

THE INDIAN SHIELD: A FISCAL OASIS



- **KEY INSIGHT:** India is insulated by domestic policy clarity.
- **POLICY:** RBI maintains 'Hawkish Pause' at 5.25%.
- **GROWTH:** The Indo-US deal adds a fundamental 1.5% GDP tailwind, specifically benefiting defense and manufacturing.

TECHNICAL STRATEGY: NIFTY 50 BREAKOUT



- **Current Level:** 25,867.30 (+0.70%)
- **Pattern:** Island Reversal confirms post-budget momentum.
- **Action:** Buy on dips near 25,200.

INSTITUTIONAL FLOWS: THE FII PIVOT



- **KEY INSIGHT:** FIIs have turned Aggressive Net Buyers, ending defensive de-leveraging.
- **ANALYST INSIGHT:** Massive FII Index Options buying suggests positioning for high-volatility upside. This flow indicates a 'Flight to Quality' away from Western inflationary jitters.

RISK MANAGEMENT: VOLATILITY STABILIZATION

India VIX



US VIX

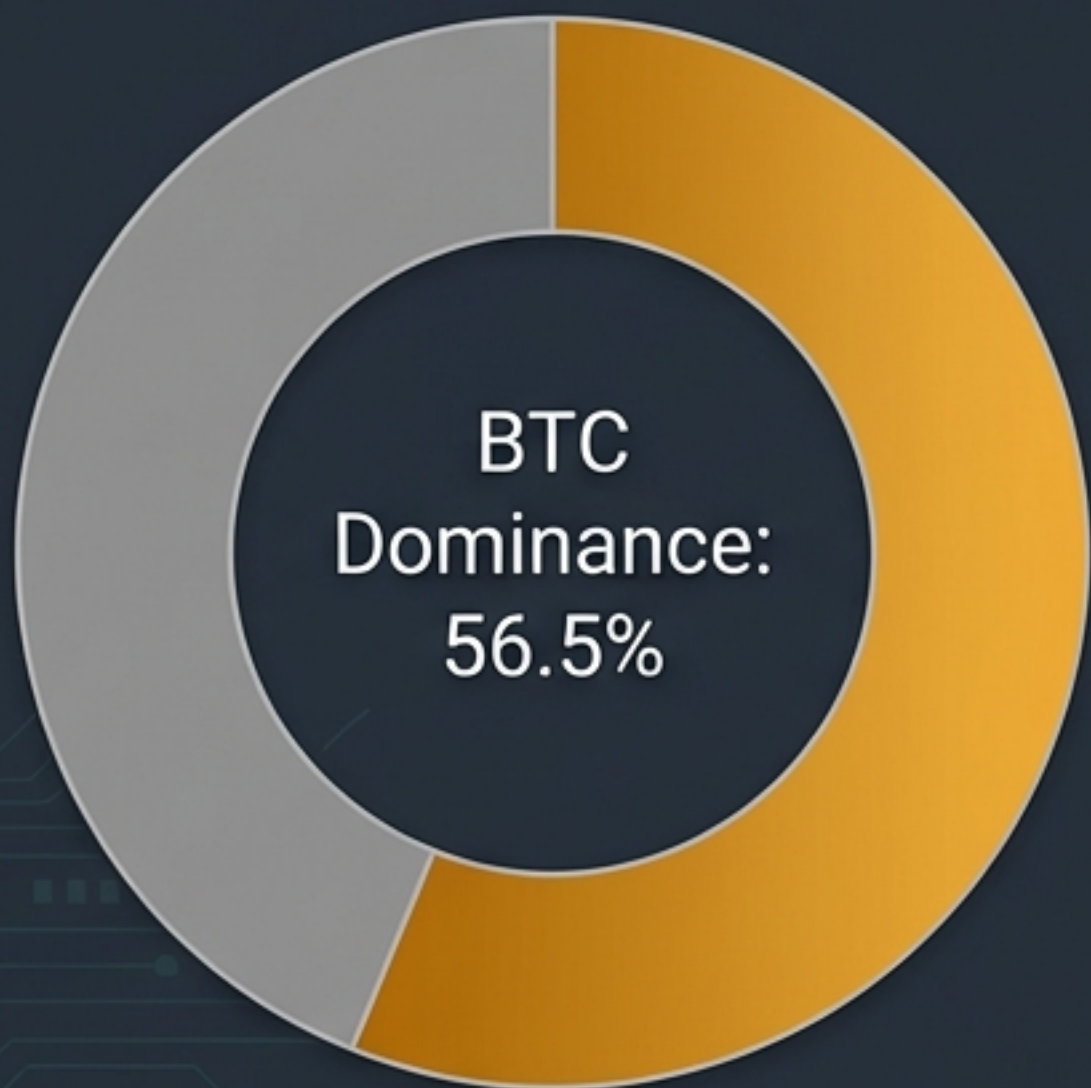


Market Mood



- **STRATEGIC ACTION:** Shift from defensive hedging to directional long positions in Indian Large Caps.
- **DATA:** Domestic pullbacks are being aggressively bought.

CRYPTO ASSETS: DEFENSIVE ACCUMULATION



- **Bitcoin (BTC):** \$69,722 (-0.54%) - Holding near ATH.
- **Ethereum (ETH):** \$2,066 (-1.77%) - Under pressure.

- **HEADWIND:** EU Commission's proposed 25% flat tax on unrealized gains.
- **ANALYST INSIGHT:** Spot ETF outflows (\$450M) suggest institutional de-risking ahead of US policy reset. 'Digital Gold' remains a corporate reserve (MicroStrategy).

COMMODITIES: SAFE HAVEN DISTRIBUTION



Gold (XAUUSD): \$5,029 (-0.56%)

Silver: \$81.24 (-2.54%)

- **KEY INSIGHT:** Commodities are undergoing 'Distribution' as capital rotates back into Equities.
- **STRATEGIC ACTION:** Avoid aggressive longs. Capital is leaving commodities for 'Growth Oases'.
- **Brent Oil:** Soft at \$68.59.

FOREX: THE DOLLAR INDEX PIVOT

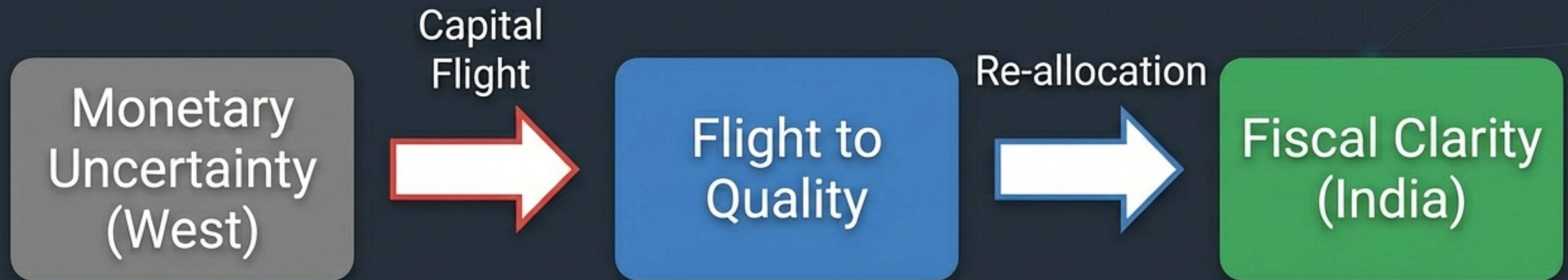


- USD/INR: 90.70 (Stable/Resilient)

KEY INSIGHT: DXY is showing a 'Topping Pattern'. The Rupee shows resilience despite dollar strength.

ANALYST INSIGHT: A high-DXY environment creates a 'Liquidity Vacuum' in crypto/commodities. Wait for dollar stabilization.

EDUCATIONAL CONCEPT: RELATIVE STRENGTH ROTATION



FISCAL OASES: Regions where domestic policy provides a safety net against global macro volatility.

INTER-MARKET CORRELATION: How 'Shadow Deflation' in the West enhances the appeal of Eastern growth.

Current Dynamic: Long India / Neutral US / Short Silver.

THE WEEK AHEAD: STRATEGIC CALENDAR

FEB 12 - India
CPI & IIP Data
(Major Trigger)

ONGOING - US
Govt Shutdown
Resolution

WATCHLIST -
DXY \$97.20
Pivot Level

STRATEGIC ACTION: Position sizing reduced by 50% until DXY trend clarifies.

FORECAST: Expect Indian outperformance to continue for the remainder of the week.

FINAL CONSIDERATIONS

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