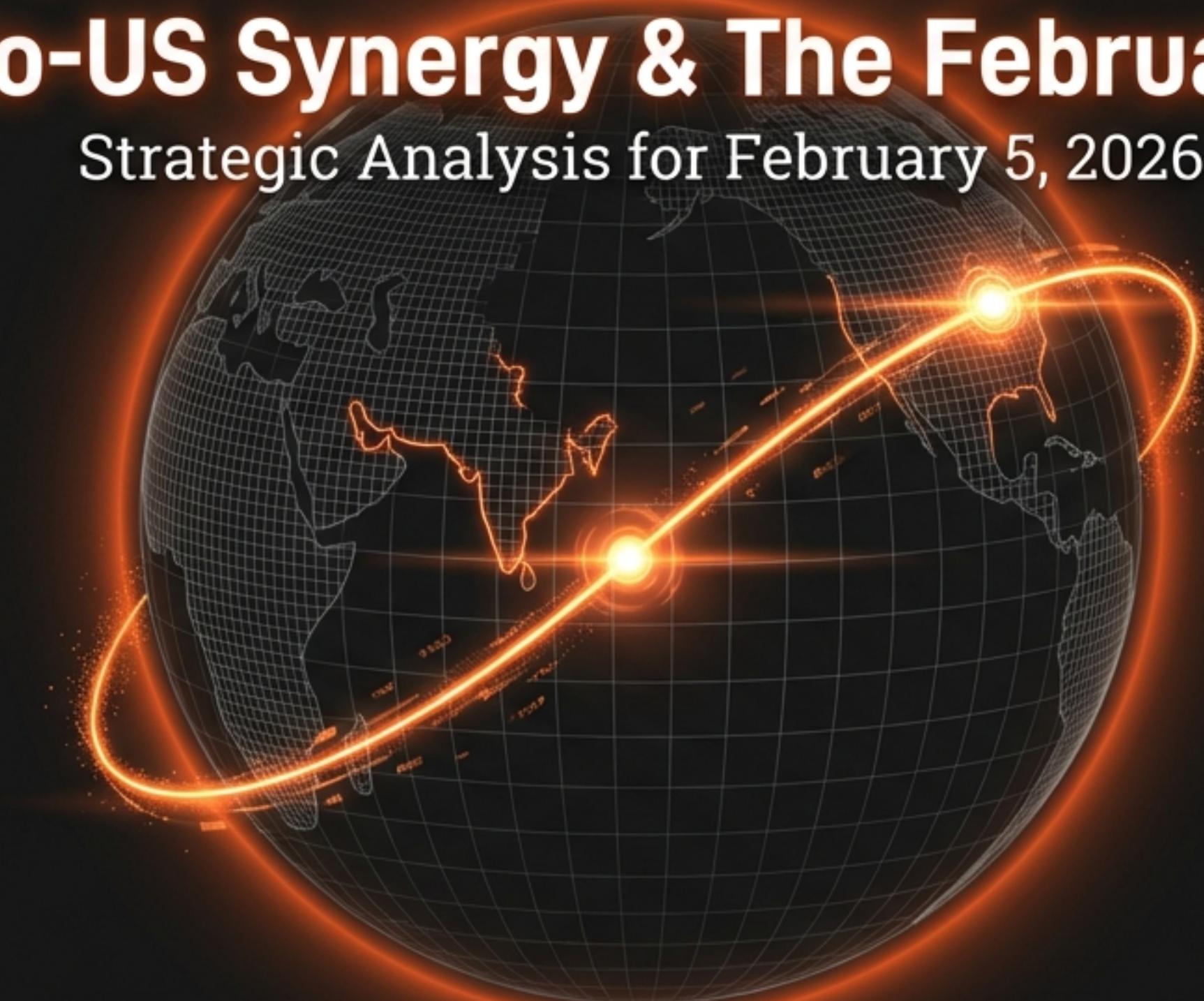


# Global Market Intelligence: The Indo-US Synergy & The February Reset

Strategic Analysis for February 5, 2026

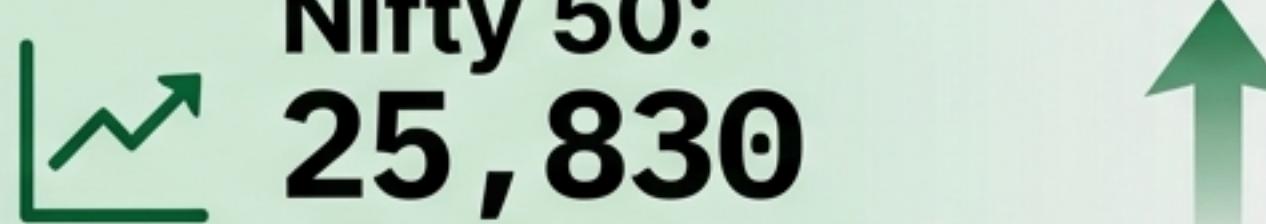


Senior Market Research | Proprietary Analysis

# State of the Markets: A Historic Structural Shift

The Indo-US Strategic Trade Deal has triggered a bifurcation in global risk assets

## EMERGING STRENGTH

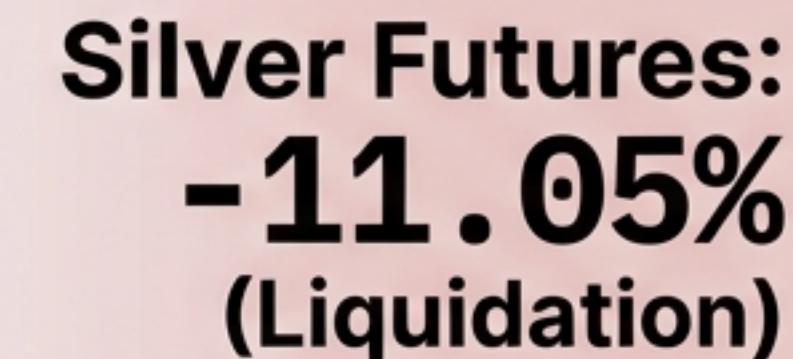


  
**Theme:**  
**High-Conviction Bullish**

## GLOBAL ANCHOR



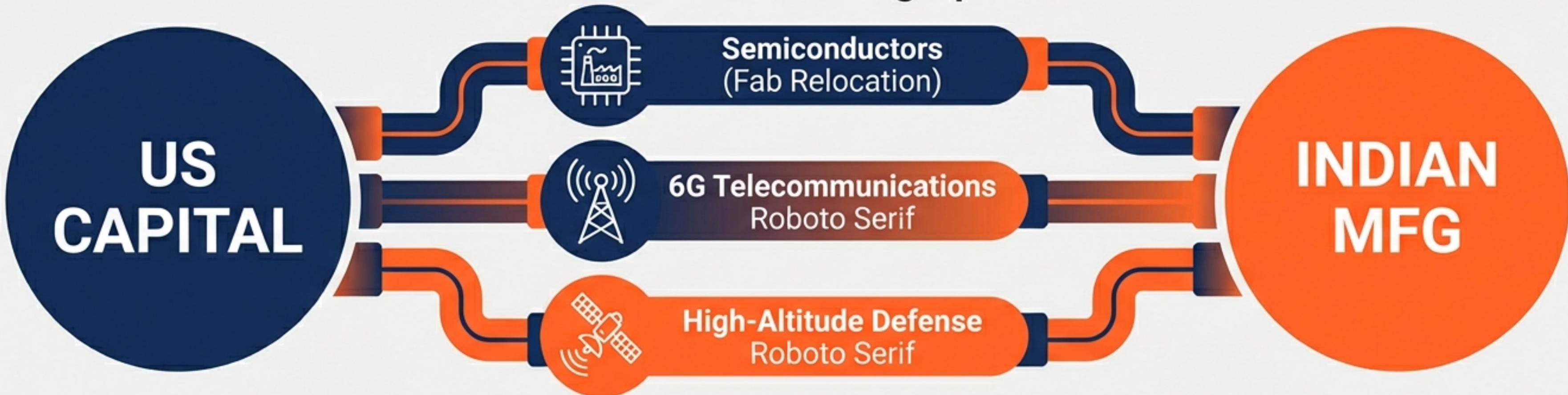
## CORRECTION ZONES



  
**Theme:**  
**Volatile Stabilization**

# The Catalyst: Deep-Tech Integration (CTTI)

## Network Node Infographic



### Economic Impact

Projected 1.2% boost to India's GDP long-term.

### Corporate Impact

Margin expansion for US multinationals via cost arbitrage.

### Strategic Focus

Supply chain security; bypassing geopolitical bottlenecks.



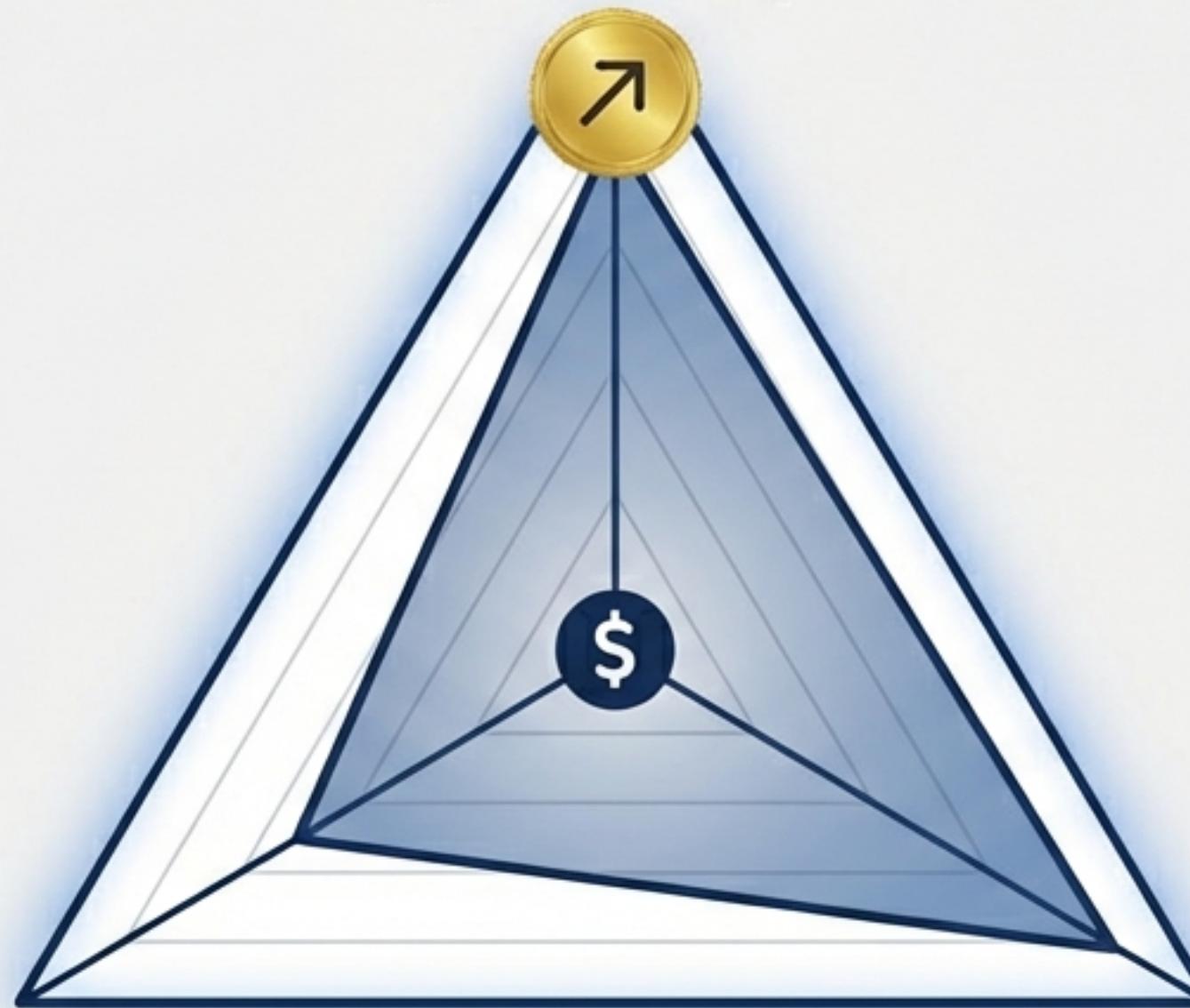
#### Analyst Insight Box:

A 'Double Win' scenario: Fiscal prudence for India and supply chain security for the US.

# The Three Pillars of February

From 'AI Hype' to 'AI Utility' amidst a rising Dollar.

**Dollar Resurgence**  
(DXY 97.67)



**Institutional Budget Pivot**  
(Long Structures)

**AI-Utility Wave**  
(Margin Focus)

## MARKET NARRATIVES

↑ Microsoft: **+0.72%**  
(Utility/Monetization)

↓ NVIDIA: **-3.41%**  
(Valuation Reset)

↓ Commodities: Liquidation  
via Monetary Cleanup

# Americas Analysis: Hawkish Vigilance



Dow Jones:  
49,444 (-0.11%)

Nasdaq 100:  
24,887 (-0.02%)

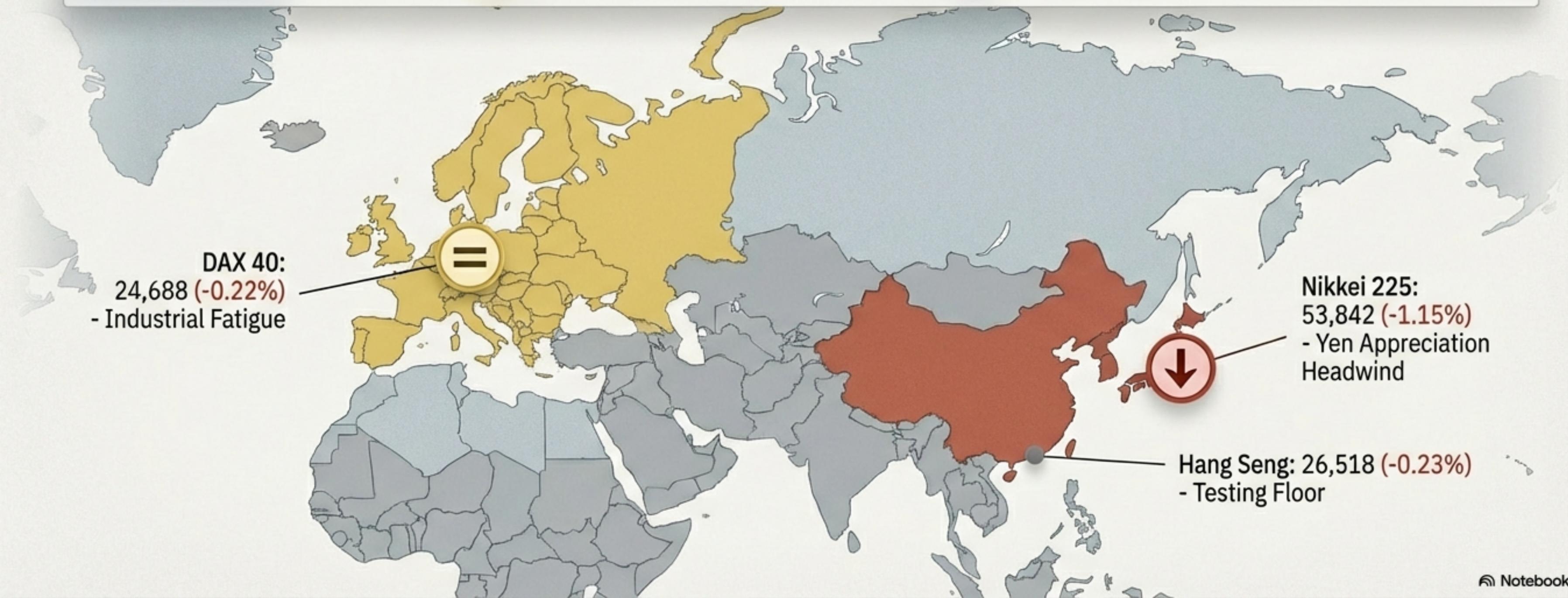
S&P 500:  
6,878 (-0.07%)

Strategic Action  
Monitor Jobs Report  
for wage signals.  
Tech rotation active.

# Eurasia Analysis: Fragmentation & Currency Wars

## KEY INSIGHT

Europe remains sideways; Japan suffers from currency shocks. No-Trade Zone active in Tokyo.



# The 'Indian Shield': Structural Bull Market

Nifty 50

**Trend:** High-Conviction Bullish  
**India VIX:** 12.25 (-5.0%)  
**USD/INR:** 89.10 (Rupee Strength)



**Strategic Action**

Buy on Dips strategy remains active. Fear has exited the market.

# Institutional Flow: The 'Smart Money' Pivot

## ANALYST INSIGHT

Institutions have switched from hedging to accumulation immediately following the Budget/Trade Deal.

### Net Institutional Flows (₹ Crores)

Shift to Structural Longs

FII Index Futures: +₹1,772 Cr

DII Cash Market: +₹249 Cr

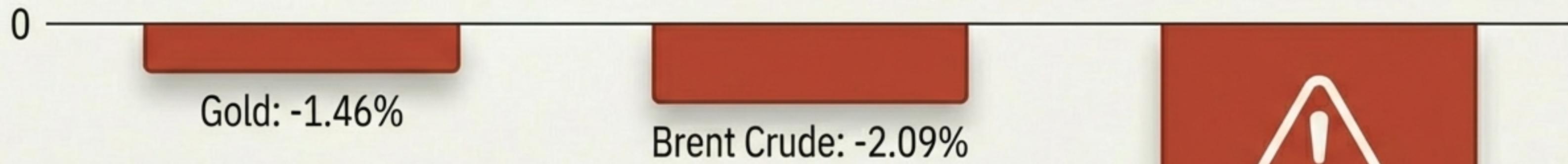
FII Cash Market: +₹29 Cr

# Commodities: Monetary Cleanup in Progress

## KEY INSIGHT

Dollar Resurgence (DXY 97.67) is flushing out overleveraged speculative longs.

### Percentage Drops



Gold: -1.46%

Brent Crude: -2.09%



**LIQUIDATION  
EVENT**

Silver: -11.05%

Gold Price: \$4,878

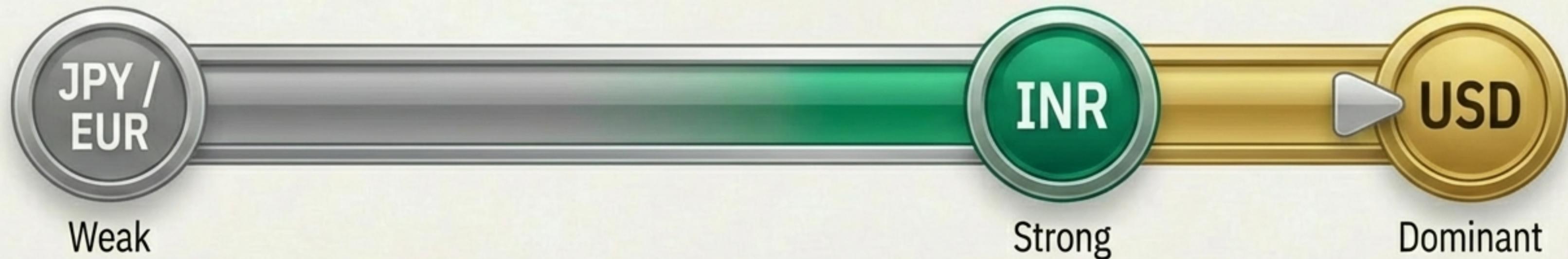
Silver Price: \$75.07

# Forex: Dollar Dominance vs. EM Resilience

## ANALYST INSIGHT

The INR is protected by the CTTI Trade Deal, defying the strong Dollar trend.

### Currency Strength Meter



**DXY Index: 97.67 (+0.19%) ↑**

Bullish Breakout

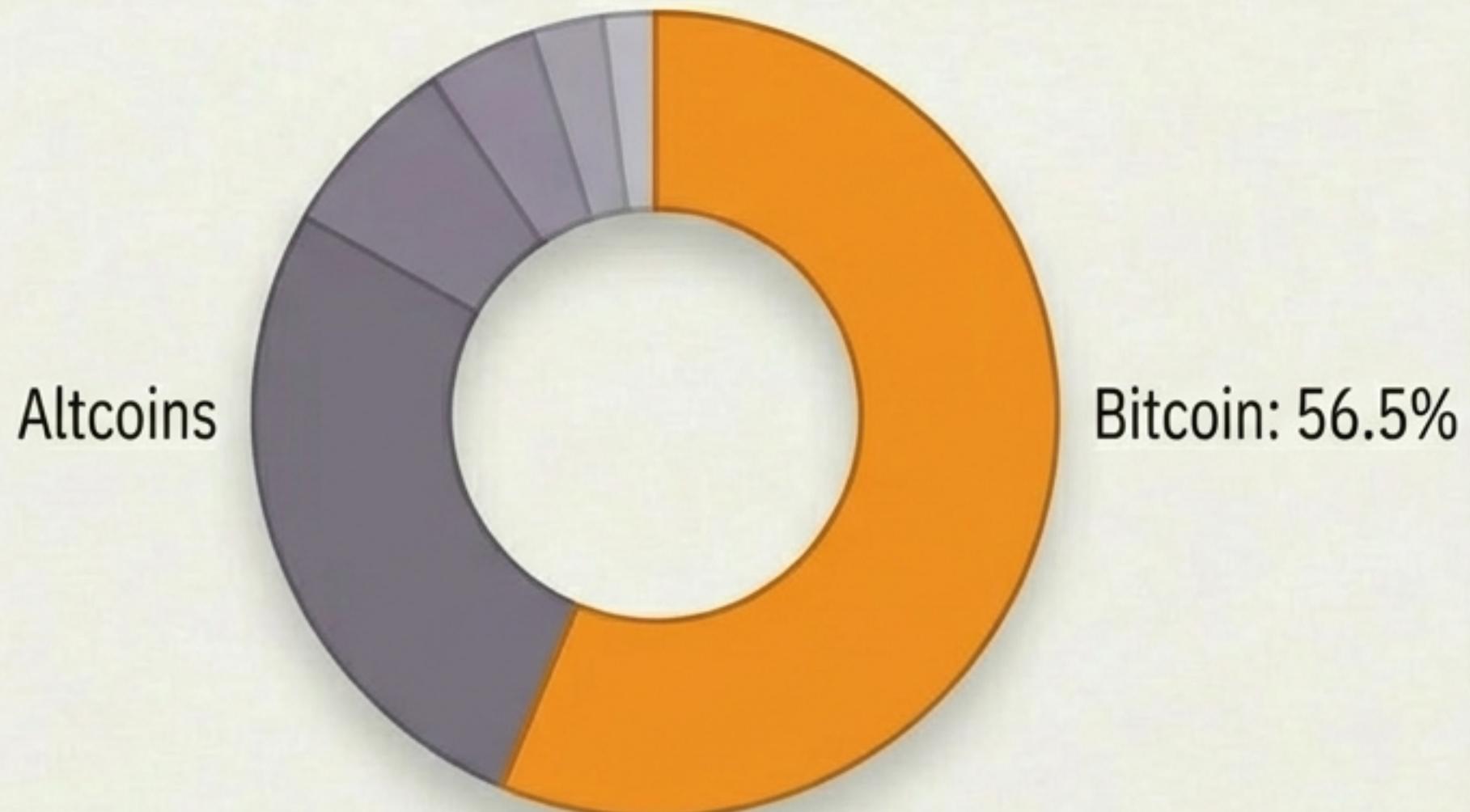
**USD/INR: 89.10 (-0.32%) ↓**

Rare Divergence

# Crypto Market: Defensive Accumulation

## KEY INSIGHT

Capital is fleeing high-beta altcoins for the safety of Digital Gold.



**Crypto Ecosystem:**  
De-Risking Phase

**Bitcoin Price:**  
\$93,950 (-0.45%)

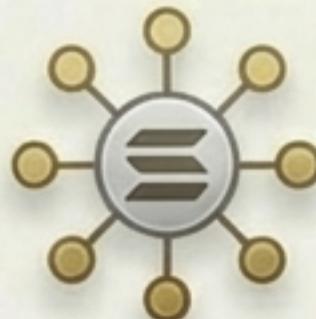
**ETF Flows:**  
\$450M Net Outflow

# Digital Assets: News & Fundamentals

## KEY INSIGHT

On-chain utility and corporate adoption remain at highs despite price consolidation.

### POSITIVE TAILWINDS



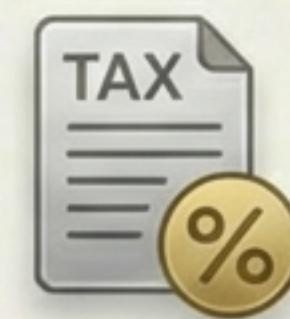
**Solana “AI-Agent”**  
Volume: 300M txns (+XX%)



**MicroStrategy:**  
+15k BTC Purchase (+XX BTC)



### NEGATIVE HEADWINDS



**EU Policy: 25% Unrealized Gains Tax Leak** (-XX%)



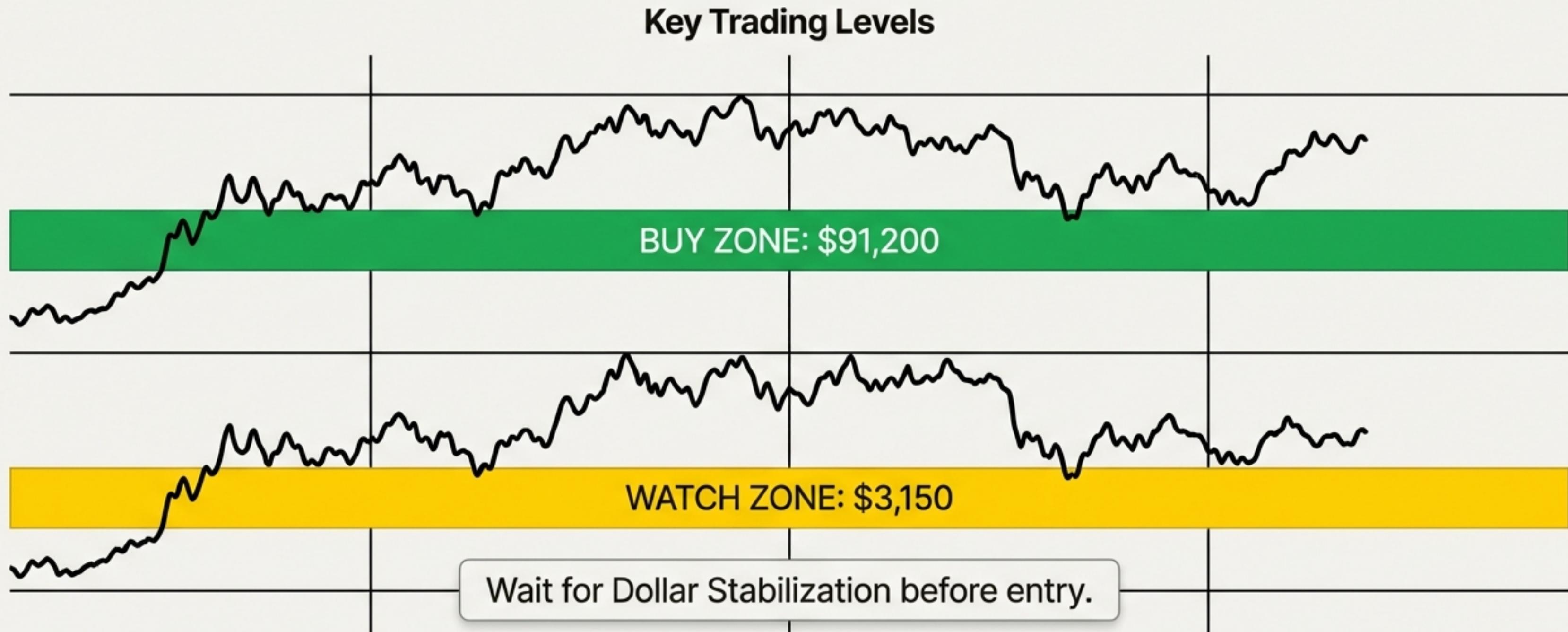
**Spot ETF Outflows**

(-\$XX M)



# Crypto Trading Plan: Technical Levels

Strategic Action: Limit orders at support only. Do not chase green candles today.



# Risk Management: The 'Watch' List

If DXY crosses 98.00, Hedge all EM Equities immediately.

**DXY DANGER LEVEL**



97.67 (Critical at 98.00)

**SILVER VOLATILITY**



Extreme Caution

**RBI POLICY RISK**



Status Quo Expected

# Final Verdict: Dollar Fortress vs. Trade Synergy



## THEME: VOLATILE STABILIZATION