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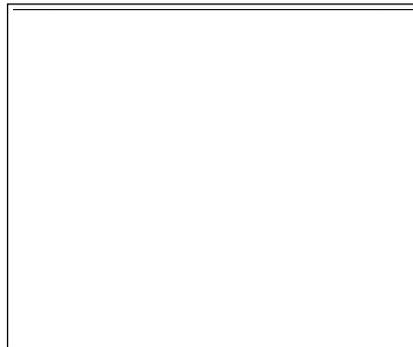
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# Aluminium faces highest upside risk if West Asia conflict persists, Vedanta best placed: CLSA

CLSA said Vedanta is best positioned to benefit from this trend given its exposure to aluminium, zinc and oil.

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By Meghna Sen

March 6, 2026, 12:15:29 PM IST (Updated)

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A prolonged conflict in the Middle East could have a pronounced impact on energy-linked commodities and transportation costs, pushing up the global cost curve and tightening the demand-supply balance, brokerage firm CLSA said in a note on metals.

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The brokerage pointed to the European energy crisis as a precedent, citing that once capacities are mothballed due to high energy costs, they often take longer to restart and in some cases may remain shut for an extended period.

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Among industrial and bulk commodities, aluminium faces the highest upside risk as nearly 9% of global capacity is located in the Middle East.

CLSA said Vedanta is best positioned to benefit from this trend given its exposure to aluminium, zinc and oil.

The brokerage estimates a mark-to-market implied value of ₹1,030 per share versus its base case valuation of ₹835.

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However, the brokerage cautioned that higher fuel costs could weigh on the profitability of cement companies unless they are able to offset the pressure through commensurate price increases.

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Despite the geopolitical developments, most metals are headed for a weekly decline.

Gold is down about 2.5% for the week, while silver has fallen nearly 10%. Copper has declined around 3%, zinc about 2%, and tin roughly 5%.

Among precious metals, platinum is down about 9% and palladium has fallen nearly 8% this week.

Aluminium, however, is bucking the trend and is up about 4% for the week.

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