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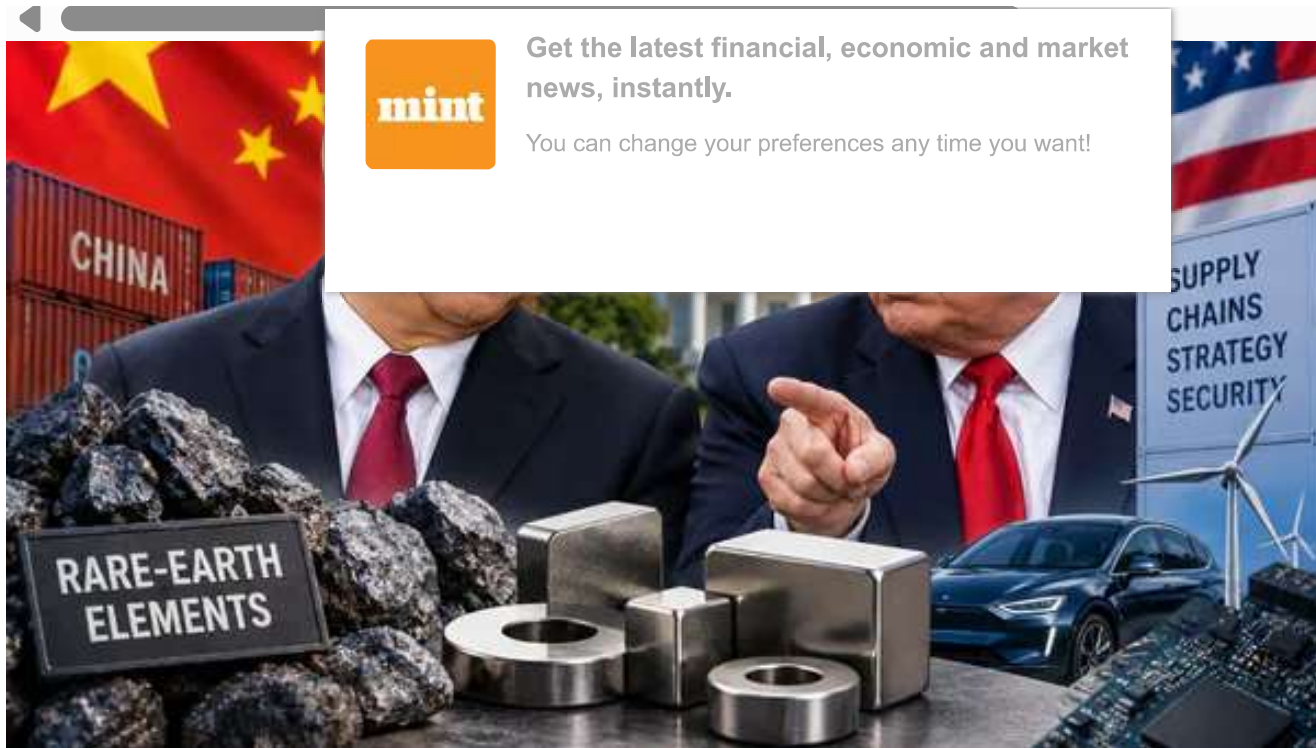
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Xi Jinping US visit: Experts believe EV and some metal stocks are expected to react ahead of Chinese President Xi Jinping and US President Donald Trump's talks in Washington. (Photo: AI-generated)

AI Quick Read

Xi Jinping US visit: The Chinese President Xi Jinping will be on a three-day official visit to the US. The White House has released its schedule, leaving global market observers guessing about the talking points for this high-profile [Xi Jinping US visit](#), taking place after a gap of 11 years. According to [stock market](#) experts, Chinese exports of rare-earth magnets have dropped ahead of this visit, which can be taken as a cue by market investors. They advised investors to bet on the rare-earth magnets play ahead of this visit.

Rare-earth magnet stocks in focus

Experts believe that high-level [US-China diplomatic engagements](#) have a deep impact on global rare earth supply chains. As Washington seeks alternatives to China's dominance in critical minerals, India emerges as a vital strategic partner. However, India's primary rare earth extractor, IREL (India) Limited, remains unlisted, so market excitement spills over directly

miners on public
have sparked po



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Speaking on the rare-earth magnet stocks that may react ahead of this high-profile Xi Jinping's US visit, Seema Srivastava, Senior Research Analyst at SMC Global Securities, said, "Major diversified mining and metal giants like Vedanta, Hindustan Zinc, and National Aluminium Company (NALCO) react strongly to global critical mineral supply anxieties. Furthermore, specialised industrial mineral players like Gujarat Mineral Development Corporation (GMDC) and Ashapura Minechem frequently experience speculative buying. Moreover, Upstream players like NMDC rally on macro sentiment as the nation accelerates domestic critical mineral exploration and rare earth diversification."

Conversely, downstream innovators like Sona BLW accelerate their pivot toward magnet-less electric-vehicle motor technologies. While NMDC benefits from higher strategic valuations tied to domestic mineral security, Sona BLW positions itself as a structural winner by engineering a way around Chinese rare earth dependencies entirely. Together, they demonstrate how Indian listed companies across the value chain react to

global trade shift
innovating around



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The SMC expert said that when US-China trade tensions flare or negotiations stall, global anxiety over supply security drives a boost in macro sentiment for Indian firms. This accelerates domestic policy initiatives such as the National Critical Mineral Mission and the Production-Linked Incentive schemes, encouraging private-sector participation. Ultimately, while a US-China summit does not directly enrich a pure-play listed Indian miner, it powerfully strengthens the nation's position in alternative supply corridors, benefiting downstream clean-tech and industrial manufacturing stocks.

EV stocks Ola Electric, Ather Energy stocks to watch

Advising investors to look at the EV stocks ahead of this high-profile Xi Jinping's US visit, Avinash Gorakshkar, Founder of Avinash Mentor Research, said, "Rare-earth magnet stocks will have an indirect impact on the EV companies and Indian stock investors may look at the EV plays like Uno Minda, Ather Energy, Ola Electric Mobility, etc. are expected to react ahead or may be during the Xi-Jinping-Donald Trump talks."

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