

## Simple Summary

This analysis follows Gauntlet's market update [here](#). We recommend no changes to these caps at this point in time.

Market

Asset

Parameter

Current Parameter

Recommended Parameter

Polygon v3

GHST

Supply Cap

5,876,000

No Change

Arbitrum v3

AAVE

Supply Cap

2,500

No Change

Polygon v3

SUSHI

Supply Cap

299,320

No Change

Polygon v3

SUSHI

Borrow Cap

102,484

No Change

Polygon v3

SUSHI: Given the asset's market cap, we do not recommend increasing supply or borrow cap.

GHST: we do not recommend increasing supply cap. The [aggressive methodology](#) based on global liquidity does not support a borrow and supply cap increase.

Arbitrum v3

AAVE: we do not recommend increasing supply cap. The aggressive methodology based on global liquidity does not support a borrow and supply cap increase.

## Analysis

### GHST on Polygon v3

Supply Cap Usage has been flat between 70-80% since Feb 1st.

### **SUSHI on Polygon v3**

Supply and Borrow Cap usage have trended between 70-80% since Feb 1st.

### **Aave on Arbitrum**

AAVE Supply Cap usage spiked to 98% on Feb 22nd but has since dropped to 80%.

### **Next Steps:**

- No immediate next steps