

August Market Pulse: Monthly Investment Insights

- ❖ **FII Strategy Shift: Buying in Equity Markets** - After a strategic shift in the second half of August, FIIs turned buyers in the domestic equity market, recording net purchases of ₹7,322 Crs. Notably, ₹12,872 Crs was channeled into primary markets, such as IPOs, signaling their confidence in new opportunities.
- ❖ **FIIs Boost Indian Debt Market in 2024's Best Year Yet** - FIIs have demonstrated strong confidence in the Indian debt market, making a significant investment of ₹17,953 Crs in August alone. With total debt inflows reaching ₹108,907 Crs in 2024 so far, this year is shaping up to be a record-breaking one for FII debt investments.
- ❖ **DII Accelerate Buying Surge in August** - Domestic Institutional Investors (DIIs) displayed robust buying interest in August, with total investments surging to ₹48,279 Crs.
- ❖ **Mutual Funds Extend Equity Buying Streak** - Mutual Funds continued their buying streak in August, injecting ₹31,685 Crs into the domestic equity markets.
- ❖ **FIIs Offload Heavily in Financial Services and Key Sectors** - Despite being net buyers in August, FIIs executed substantial selloffs in the Financial Services sector, unloading a hefty ₹12,008 Crs from Financial Services. Other sectors facing significant FII exits included Metals & Mining, Construction Materials, Automobiles & Auto Components, Realty and Power.
- ❖ **FIIs Maintain Investment in Defensive and Growth Sectors** - FIIs showed a strong preference for investments in the Healthcare, Information Technology, Consumer Durables, Consumer Services, FMCG, Oil & Gas and Telecommunication sectors in August.

Monthly Investment Insights

Tracking Flows by Market Participants

Market Participants	For the month of August		Jan-Aug, 2024	
	Equity (Crs)	Debt (Crs)	Equity (Crs)	Debt (Crs)
FII	7,322	17,953	42,881	108,907
DII	48,279	-	308,752	-
Mutual Funds	31,685	(52,470)	247,462	(217,234)

*DII investments include MFs Investments.

Sector-Wise FII Equity Purchases in August

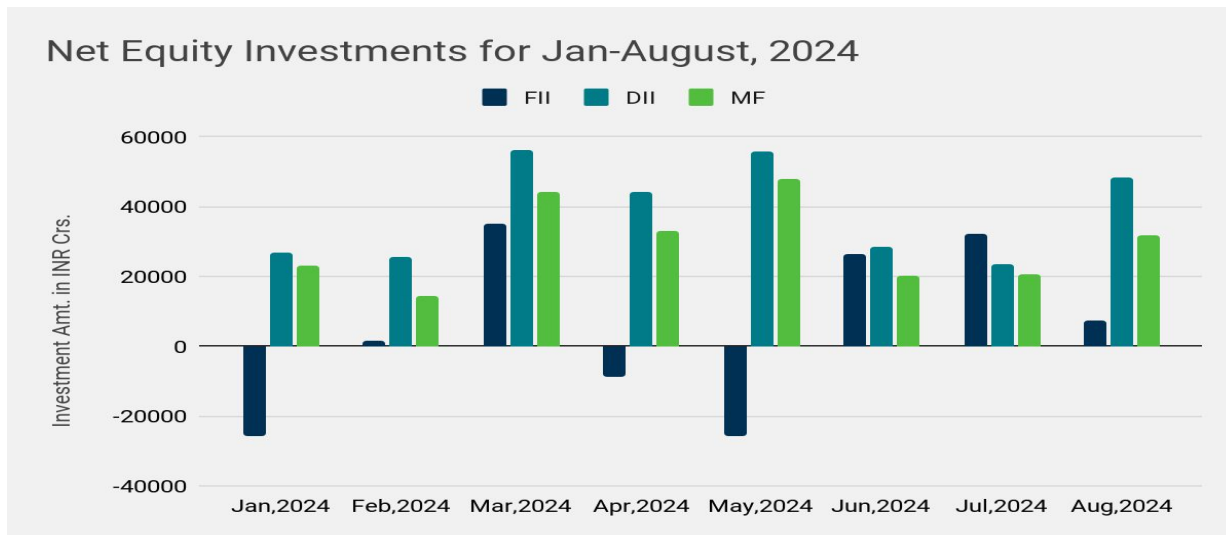
Sector	Amount (Crs)
Healthcare	5,831
Consumer Durables	4,713
Consumer Services	4,158
Information Technology	4,036
Fast Moving Consumer Goods	3,600
Services	2,163
Telecommunication	2,061

Sector-Wise FII Equity Sales in August

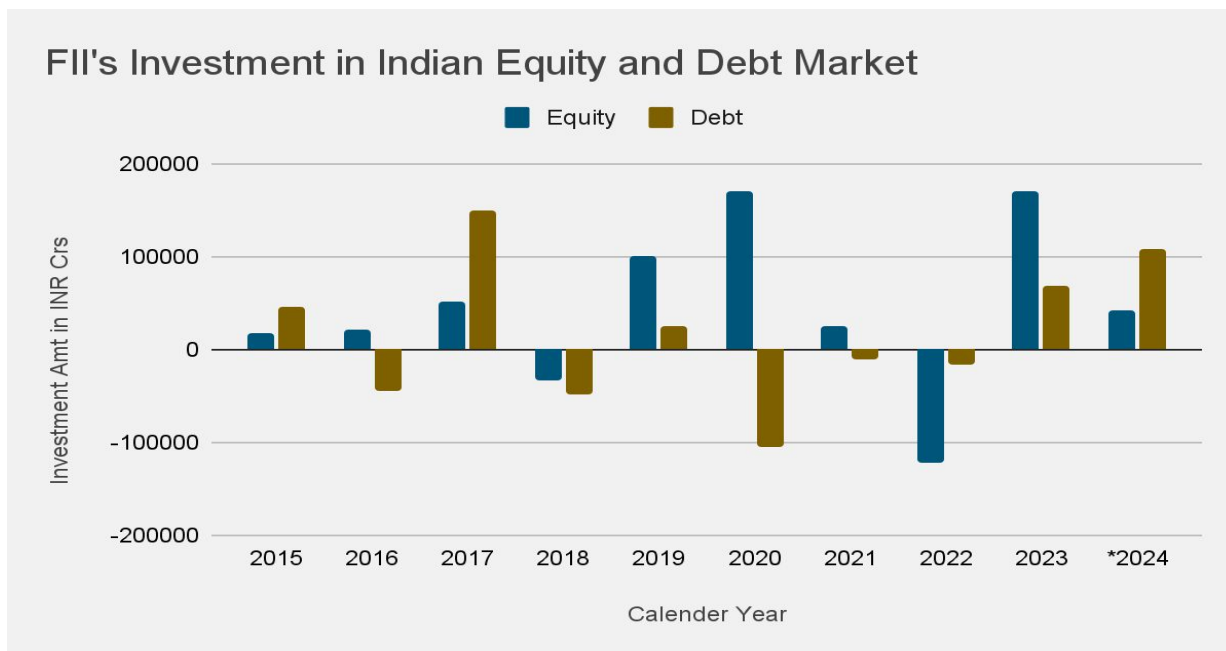
Sector	Amount (Crs)
Financial Services	-12,008
Metals & Mining	-3,773
Automobile and Auto Components	-2,379
Realty	-1,166
Construction Materials	-1,142
Power	-1,136
Construction	-758

Source: NSDL, SEBI

Equity Investment Breakdown by Participant



FII's Strategic Investments in Equity and Debt Markets



Sector-Wise FII Equity Purchases from Jan-Aug, 24	
Sector	Amount (Crs)
Consumer Services	29,474
Telecommunication	29,206
Capital Goods	25,461
Healthcare	17,525
Services	11,747
Realty	9,446
Automobile and Auto Components	7,685

Sector-Wise FII Equity Sales from Jan-Aug, 24	
Sector	Amount (Crs)
Financial Services	-64,932
Construction	-11,397
Oil, Gas & Consumable Fuels	-10,084
Fast Moving Consumer Goods	-9,315
Power	-5048
Media, Entertainment & Publication	-2361
Metals & Mining	-1743

*For CY 2024, all data considered till 31st August. DII investments include MFs Investments.

Source: NSDL, SEBI