

## December Market Pulse: Fortnightly Investment Insights

- ❖ **FPIs Back with a Bang: ₹22,766 Cr Pours into Indian Equities in December's First Half**
  - FPIs shifted gears in December, becoming net buyers after October and November sell-off.
  - Equity purchases through secondary markets hit **₹14,435 Cr** in the first half of December, sparking a recovery from November lows.
  - Total FPI investment, including primary market investments and others, surged to **₹22,766 Cr**.
- ❖ **FPIs Spark Record-Breaking Debt Market Investment in 2024**
  - FPIs poured **₹12,374 Cr** into the Indian debt market in the first half of December.
  - Cumulative FPI debt investment surged to **₹1,52,637 Cr**, marking an all-time high for Indian debt markets. This milestone surpasses the previous record of ₹1,48,808 Cr set in 2017.
  - 2024 is shaping up as a landmark year for FPI investments in Indian debt markets.
- ❖ **MFs Tap the Brakes: Slower Investment Pace in December's First Half**
  - Mutual Funds eased their investment momentum in the first half of December, adding **₹5,945 Cr** to Indian equity markets.
  - In 2024, MFs have driven DII equity inflows, investing an astounding ₹4.11 trillion out of the total ₹4.97 trillion.
  - This is more than double the ₹1.86 trillion invested in 2022, showcasing their rising dominance.
  - Steady MF inflows have countered FPI outflows, highlighting the critical role of domestic investors in market stability.
- ❖ **DII's Shift Gears: Profit Booking Amid Record Annual Investments**
  - DIIs, excluding Mutual Funds, turned sellers in early December, booking profits with over ₹1,000 cr in Indian equity markets.
  - Despite this, DIIs have net bought a **record ₹4.97 trillion in 2024**, shattering the previous high of ₹2.8 trillion in 2022.
  - This remarkable milestone underscores the strength of domestic support in driving market stability.

## Fortnightly Investment Insights

### Tracking Investments of Market Participants

Market Participants	For the Period 1st to 15th Dec, 2024		For the Period 1st Jan, 2024 to 15th Dec, 2024	
	Equity (Cr)	Debt (Cr)	Equity (Cr)	Debt (Cr)
FPI	22,766	12,374	7,747	152,637
DII	4,672	-	497,023	-
Mutual Funds	5,945	(37,612)	411,455	(347,485)

\*DII investments include MFs Investments. Data updated till 15th December.

### Absolute Gains: A Snapshot of Indices Performance(%)

Benchmark	December's First Half	YTD
Sensex	2.92	13.69
Nifty 50	2.64	13.97
Nifty Midcap 150	4.02	27.35
Nifty Smallcap 250	3.09	30.07

## Mapping FPI Investments: Sector-wise Insights in Indian Equities

- ❖ **FPIs Shift to Buying Mode: Focus on Financials, IT, Realty and More**
  - Following significant selloffs in October and November, FPIs have turned buyers in the first half of December, signaling a shift in strategy. Their investments are now focused on sectors like Financial Services, Information Technology and Realty, along with Consumer Services, Capital Goods, Healthcare, Construction and Metal & Mining.
- ❖ **FPIs Divest Aggressively in Oil & Gas Sector**
  - In the first half of December, FPIs executed a significant selloff in the Oil & Gas sector, disinvesting ₹5,337 crore. Other sectors that witnessed selloffs include Automobiles & Auto Components, FMCG, Consumer Durables, Power and Construction Materials, reflecting a strategic reallocation of investments by foreign players.
- ❖ **FPIs Top Picks in 2024: Capital Goods, Healthcare, Telecom and More**
  - In 2024, FPIs have shown a clear preference for sectors like Capital Goods, Healthcare, Telecommunication, Consumer Services, Realty, Information Technology, Services and Chemicals. This strategic focus underscores their confidence in high-growth industries.
- ❖ **FPI Exit in 2024: Major Selloff in Financials, Oil & Gas, FMCG, Auto and More**
  - In 2024, FPIs have heavily offloaded their holdings in sectors like Financial Services, Oil & Gas, FMCG, Automobile & Auto Components, Construction, Construction Materials, Power and Media, reflecting a broad exit from these key areas.

### Sector-Wise FPI Equity Purchases: 1st–15th Dec 2024

Sector	Amount (Crs)
Financial Services	7,424
Information Technology	6,754
Realty	4,689
Consumer Services	2,715
Capital Goods	2,657
Healthcare	1,917
Construction	1,148
Metals & Mining	847

### Sector-Wise FPI Equity Sales: 1st–15th Dec 2024

Sector	Amount (Crs)
Oil, Gas & Consumable Fuels	-5,337
Automobile and Auto Components	-1,823
Fast Moving Consumer Goods	-1,655
Consumer Durables	-748
Power	-552
Construction Materials	-174
Diversified	-96

### Sector-Wise FPI Equity Purchases from Jan-Dec, 24

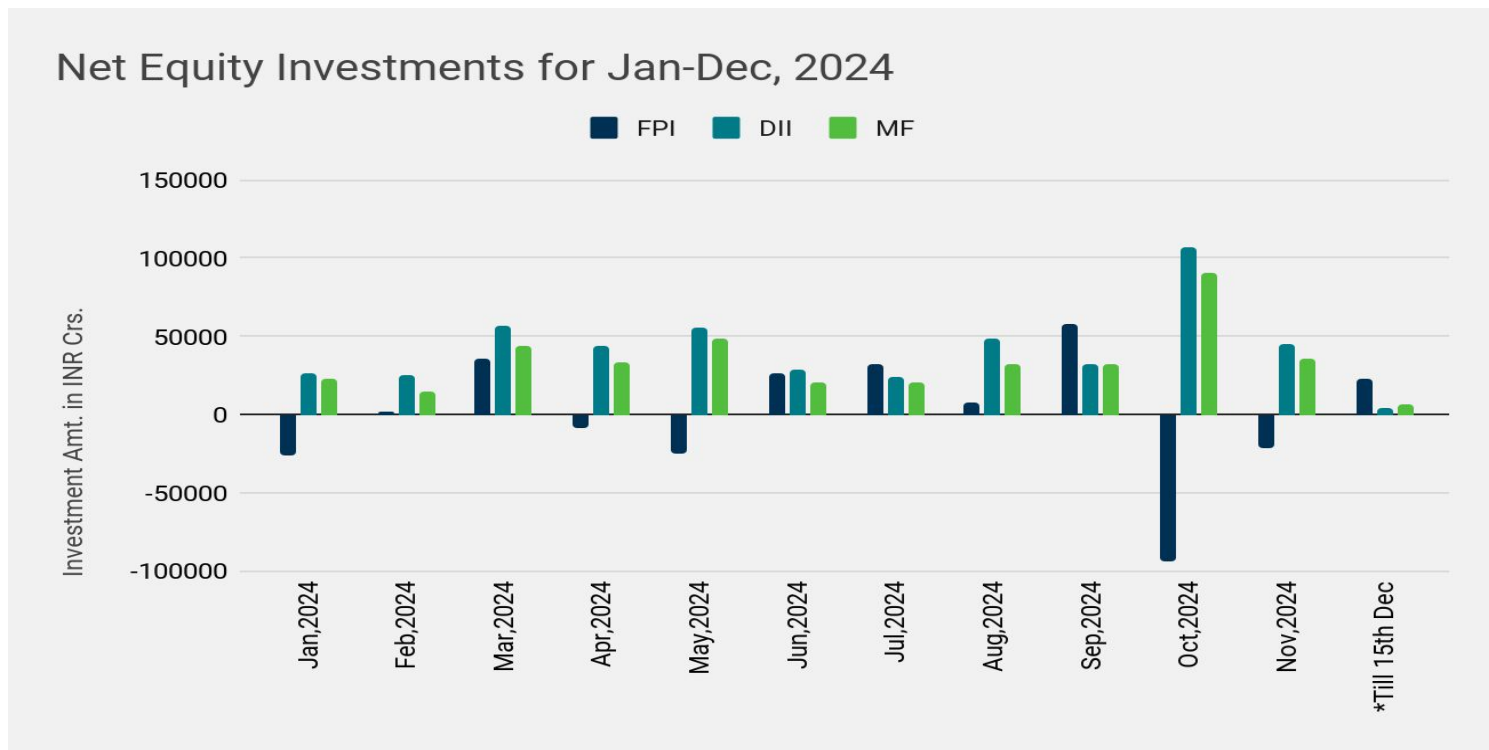
Sector	Amount (Crs)
Capital Goods	29,011
Healthcare	26,506
Telecommunication	23,992
Consumer Services	20,228
Realty	20,181
Information Technology	12,618
Services	9,400
Chemicals	4,358

### Sector-Wise FPI Equity Sales from Jan-Dec, 24

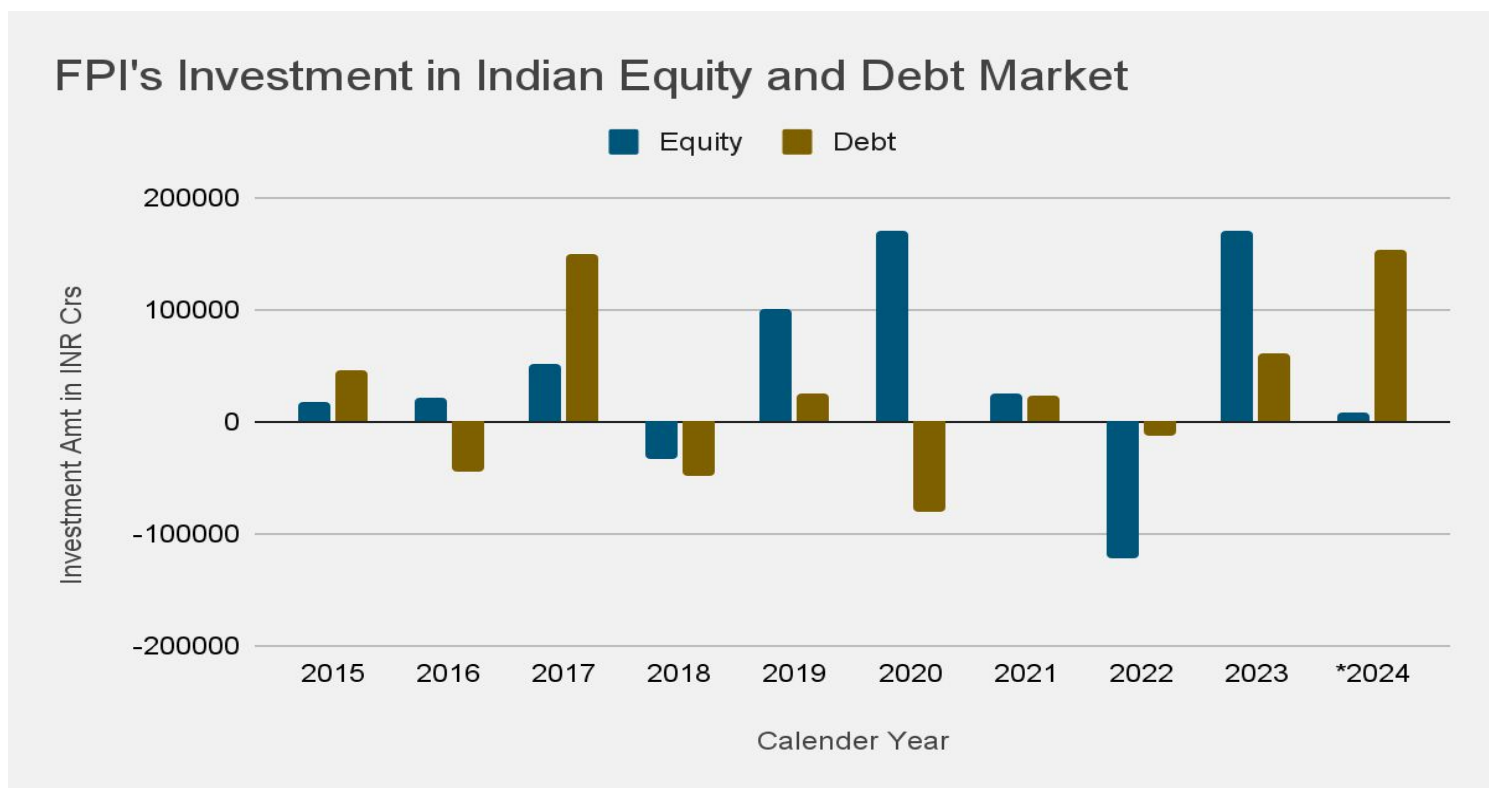
Sector	Amount (Crs)
Financial Services	-53,942
Oil, Gas & Consumable Fuels	-50,851
Fast Moving Consumer Goods	-19,057
Automobile and Auto Components	-14,148
Construction	-11,798
Construction Materials	-8,365
Power	-6,498
Media, Entertainment & Publication	-2,244

\*For CY 2024, all data considered till 15th December. DII investments include MFs Investments.

## Equity Investment Breakdown by Participant



## FII's Strategic Investments in Equity and Debt Markets



\*For CY 2024, all other data is updated till 15th December. DII investments include MF investments.

Source: NSDL, SEBI