

November Market Pulse: Monthly Investment Insights

- ❖ **FPIs Turn Net Sellers in 2024 as November Records Slower Selloffs Amid Volatility**
 - FPIs pulled **₹21,612 Crs** from the markets in November, citing expensive valuations and weak Q2 earnings, a notable slowdown compared to October's sharp selloff.
 - The November selloff pushed FPIs into net selling territory for the calendar year 2024, with total year-to-date selloff amounting to **₹15,019 Crs**, reflecting increased market pressures and cautious sentiment.
 - Despite market weakness in November, FPIs invested **₹17,704 Crs** in primary markets and briefly turned buyers, infusing ₹15,829 Crs between November 22-26 before resuming sales.
- ❖ **FPI Muted in Debt Market: November Witnesses Minor Selloff**
 - FPIs sold a modest **₹36 Crs** in India's debt market in November 2024, reflecting subdued activity in the segment.
 - This marginal selloff brought the cumulative debt market investments for the calendar year down to **₹1,40,263 Crs**, highlighting reduced foreign interest.
- ❖ **DII Buying Shields Markets from FPI Selloff in November**
 - Domestic Institutional Investors (DIIs) set a record in 2024 with net purchases exceeding ₹4.92 trillion, breaking the ₹2.8 trillion annual investment record from 2022.
 - In November, DIIs countered heavy FPI selloffs by injecting **₹44,484 Crs**, providing stability and cushioning the market against foreign selloffs.
- ❖ **Mutual Funds Drive DII Surge with ₹4.05 Trillion in 2024**
 - Mutual Funds led the charge in record-breaking DII investment, contributing ₹4.05 trillion out of the ₹4.92 trillion total in 2024.
 - In November, they bolstered the Indian equity markets with an investment of **₹35,633 Crs**, cementing their role as a market stabilizer.

Monthly Investment Insights

Tracking Flows by Market Participants

Market Participants	For the month of November		Jan-Nov, 2024	
	Equity (Crs)	Debt (Crs)	Equity (Crs)	Debt (Crs)
FPI	(21,612)	(36)	(15,019)	140263
DII	44,484	-	492,350	-
Mutual Funds	35,633	(32,395)	405,510	(309,874)

*DII investments include MFs Investments.

Indian Benchmark Indices: Tracking Performance

Absolute Gains: A Snapshot of Indices Performance(%)

Benchmark	November	YTD
Sensex	0.52	10.47
Nifty 50	-0.31	11.04
Nifty Midcap 150	0.14	22.43
Nifty Smallcap 250	-0.20	26.17

Source: NSDL, SEBI, NSE

Mapping FPI Investments: Sector-wise Insights in Indian Equities

- ❖ **FPI Record Selloff Hits Key Sectors: Oil & Gas, Auto, Telecom and More**
 - In November, FPIs significantly reduced holdings across crucial sectors like Oil & Gas, Automobile & Auto Components, Telecommunication, Services, Construction Materials, FMCG, Metal & Mining and Power. This widespread selloff underscores rising global uncertainties and intensifying market pressures.
- ❖ **FPIs Bet on IT, Financials and Realty Amid November Selloff**
 - Amid selloffs in November, FPIs made investments in the Information Technology, Financial Services, Realty, Construction, Healthcare, Textiles and Utilities, indicating cautious, sector-specific interest despite broader market challenges.
- ❖ **FPIs Top Picks in 2024: Capital Goods, Healthcare, IT and More**
 - In 2024, FPIs have shown a clear preference for sectors like Capital Goods, Healthcare, Telecommunication, Consumer Services, Realty, Services, Information Technology and Chemicals, highlighting their strategic focus on these high-growth industries.
- ❖ **FPI Exit in 2024: Major Selloff in Financials, Oil & Gas, FMCG and More**
 - In 2024, FPIs have heavily offloaded their holdings in sectors like Financial Services, Oil & Gas, FMCG, Construction, Automobile & Auto Components, Construction Materials, Power and Media, reflecting a broad exit from these key areas.

Sector-Wise FPI Equity Purchases in November	
Sector	Amount (Cr₹)
Information Technology	5,516
Financial Services	2,505
Realty	2,061
Construction	2,006
Healthcare	480
Textiles	412
Utilities	139
Forest Materials	74

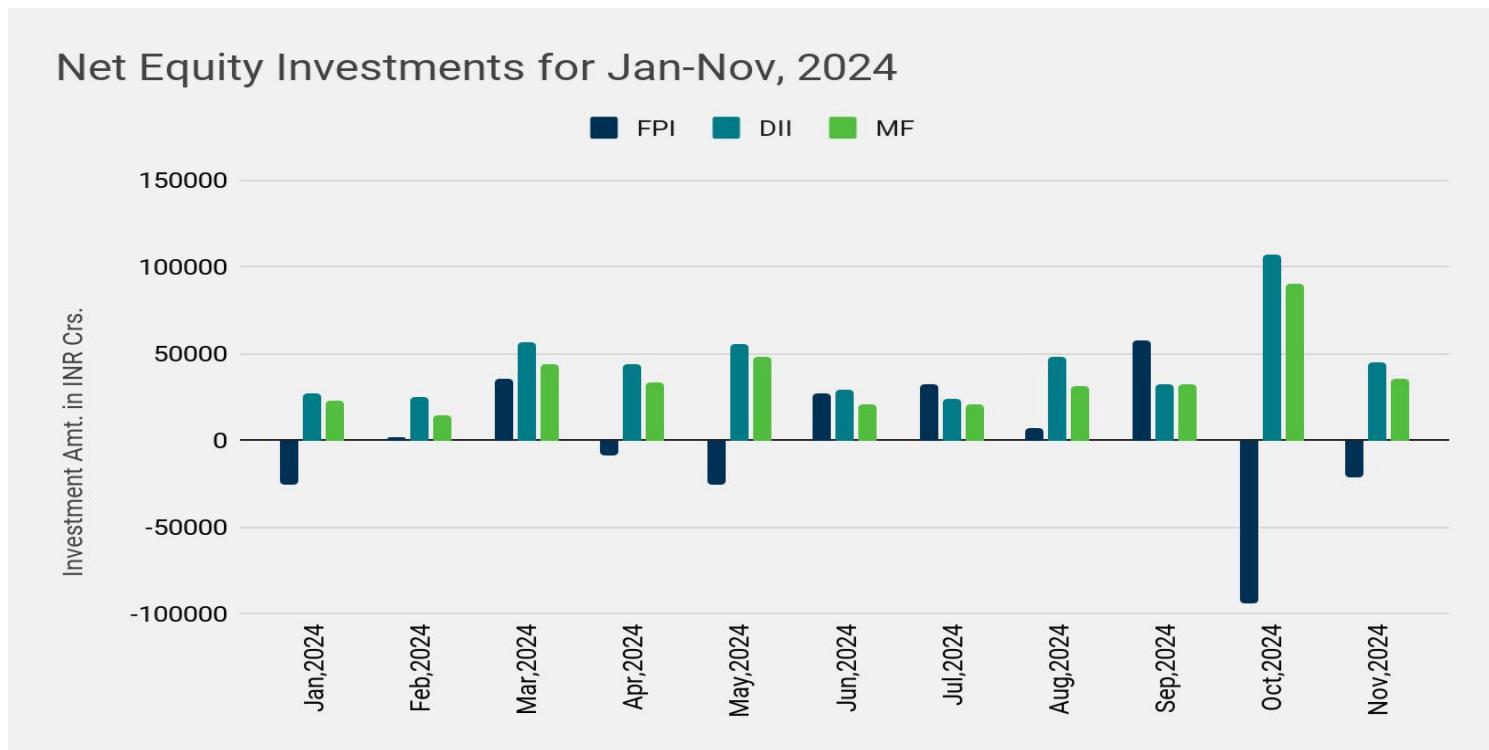
Sector-Wise FPI Equity Sales in November	
Sector	Amount (Cr₹)
Oil, Gas & Consumable Fuels	-13,346
Automobile and Auto Components	-7,464
Telecommunication	-5,078
Services	-3,722
Construction Materials	-2,715
Fast Moving Consumer Goods	-1,405
Metals & Mining	-1,205
Power	-797

Sector-Wise FPI Equity Purchases from Jan-Nov, 24	
Sector	Amount (Cr₹)
Capital Goods	26,354
Healthcare	24,589
Telecommunication	23,365
Consumer Services	17,513
Realty	15,492
Services	8,847
Information Technology	5,864
Chemicals	3,712

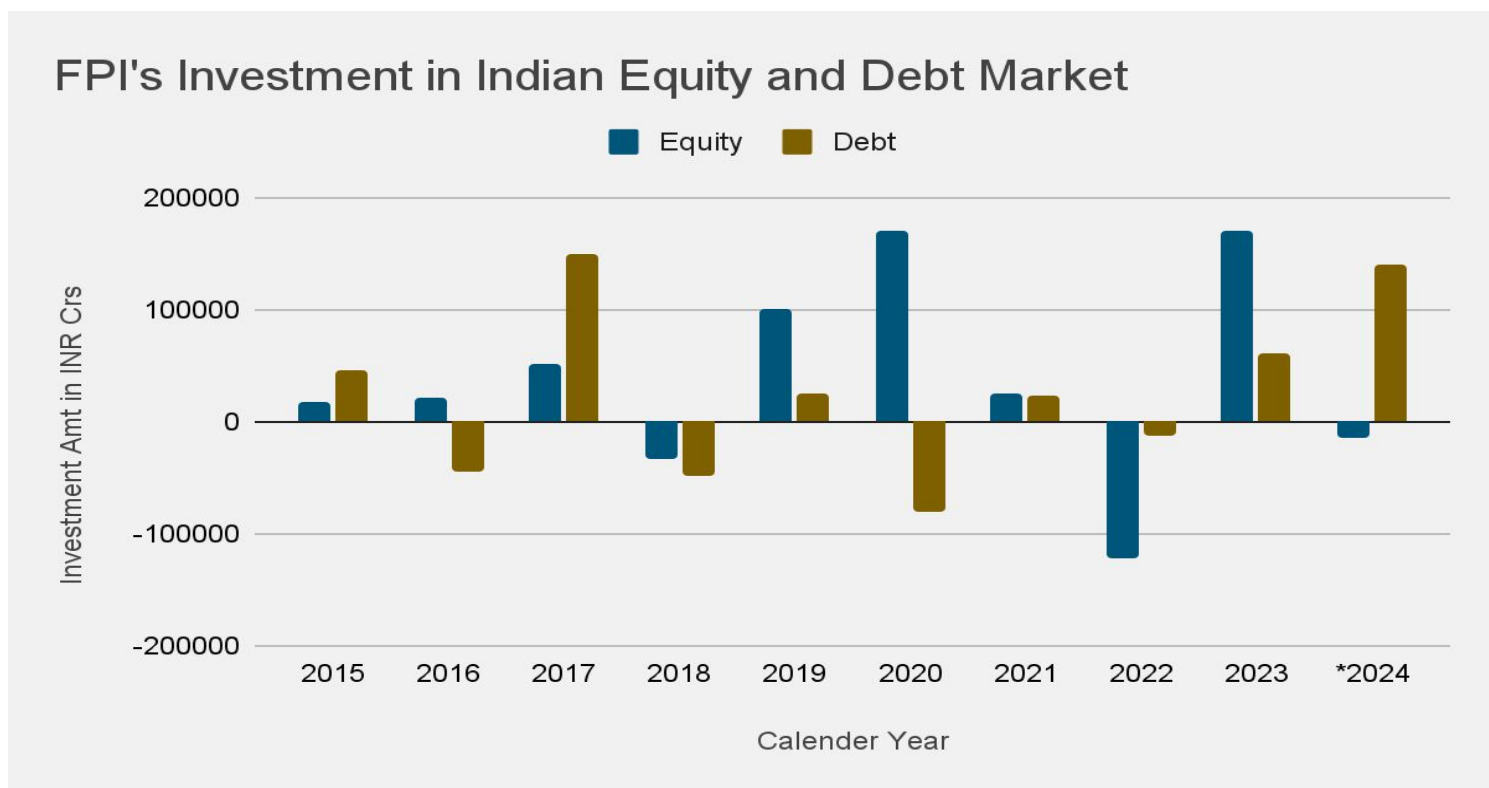
Sector-Wise FPI Equity Sales from Jan-Nov, 24	
Sector	Amount (Cr₹)
Financial Services	-61,366
Oil, Gas & Consumable Fuels	-45,514
Fast Moving Consumer Goods	-17,402
Construction	-12,946
Automobile and Auto Components	-12,325
Construction Materials	-8,191
Power	-5,946
Media, Entertainment & Publication	-2,259

*For CY 2024, all data considered till 30th November. 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 30th November. DII investments include MF investments.

Source: NSDL, SEBI