

## January Market Pulse: Monthly Investment Insights

### ❖ FPIs Selloff: Global Sentiment Turns Cautious

- FPIs withdrew **₹78,027 crore** from Indian equities in January, signaling risk-off sentiment due to global uncertainties. Notably, there was net buying on just one trading day out of the 23 sessions in January, highlighting persistent selling pressure.
- In contrast to the secondary market sell-off, FPIs showed interest in the **primary markets** with purchases worth **₹3,877 crore**.
- A modest inflow of **₹571 crore** was recorded in the **debt segment**, reflecting selective interest in fixed-income securities.
- For April,24 - January,25, FPIs reported an equity outflow of **₹88,493 crore** while **debt inflows** remained strong at **₹94,858 crore**.

### ❖ DII Power Play: Strong Support Amid Market Volatility

- DIIs infused **₹86,592 crore** into equities in January, providing strong support amid foreign outflows.
- Their consistent buying reflects robust confidence in India's economic fundamentals and growth prospects.
- Between April 2024 and January 2025, DIIs have invested a massive **₹5.05 Lakh crore** in equities, **showcasing their critical role in market stability**.

### ❖ Mutual Funds Momentum: Equity Resilience

- Mutual Funds reported strong equity inflows of **₹57,619 crore** in January, driven by sustained retail participation and SIP flows.
- Cumulatively from April 2024 to January 2025, mutual funds invested **₹4.09 Lakh crore** in equities, highlighting equity market resilience.

## Monthly Investment Insights

### Tracking Flows by Market Participants

Market Participants	For the month of January		Apr, 2024 - Jan, 2025	
	Equity (Cr₹)	Debt (Cr₹)	Equity (Cr₹)	Debt (Cr₹)
FPI	(78,027)	571	(88,493)	94,858
DII	86,592	-	504,702	-
Mutual Funds	57,619	(55,209)	409,728	(302,152)

\*DII investments include MFs Investments.

## Indian Benchmark Indices: Tracking Performance

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

Benchmark	January 2025	FY25 Till Date
Sensex	-0.82	5.23
Nifty 50	-0.58	5.29
Nifty Midcap 150	-6.10	11.74
Nifty Smallcap 250	-10.71	10.61

Source: NSDL, SEBI, NSE

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

### ❖ January's Aggressive FPI Selloff in Key Sectors

- FPIs offloaded heavily in **Financial Services** (₹24,949 crore), with notable outflows in **Consumer Services** and **Information Technology**, amid global slowdown fears. Auto & Auto Components, Capital Goods, Healthcare, FMCG and Power also faced significant sell-offs due to cautious sentiment and valuation concerns.

### ❖ Selective FPI Bets Amid Bearish Trend

- Despite a broad selloff, FPIs showed interest in select sectors with **Textiles** leading at ₹602 crore, followed by **Chemicals**, **Diversified**, **Media & Entertainment** and **Telecommunication**, reflecting confidence in export-driven growth, specialty chemicals, and digital infrastructure.

### ❖ April 2024 - January 2025: Sector-Wise FPI Selloff

- FPIs trimmed exposure in **Oil & Gas** (₹55,557 crore) and **Financial Services** (₹46,704 crore) amid energy price volatility and macroeconomic concerns. Significant outflows were also seen in **Auto & Auto Components** (₹27,606 crore), **FMCG** (₹24,738 crore), **Power** (₹13,121 crore) and **Construction** (₹10,346 crore) due to demand slowdown and profit booking.

### ❖ April 2024 - January 2025: Focus on Growth Sectors

- FPIs favored growth-centric sectors with top inflows in **Healthcare** (₹20,097 crore), **Telecommunication** (₹17,202 crore), **Capital Goods** (₹15,394 crore), **Realty** (₹12,918 crore) and **Chemicals**. Apart from these, Information Technology, Textiles and Services also attracted notable traction.

Sector-Wise FPI Equity Purchases in January	
Sector	Amount (Cr₹)
Textiles	602
Chemicals	355
Diversified	227
Media, Entertainment & Publication	180
Telecommunication	144

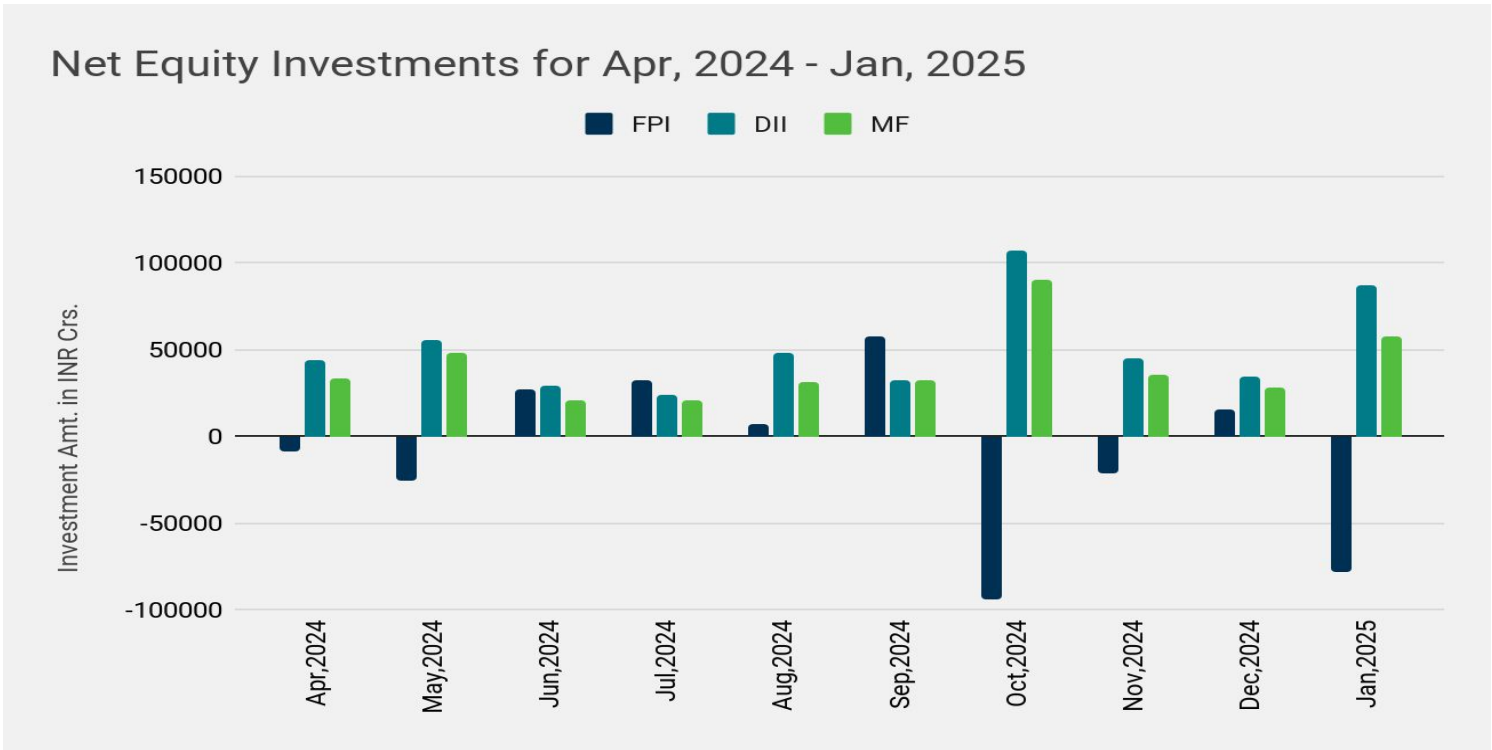
Sector-Wise FPI Equity Sales in January	
Sector	Amount (Cr₹)
Financial Services	-24,949
Consumer Services	-8,347
Information Technology	-6,471
Automobile and Auto Components	-5,823
Capital Goods	-5,697
Fast Moving Consumer Goods	-5,428
Healthcare	-4,372
Power	-4,198

Sector-Wise FPI Equity Purchases from Apr,24-Jan,25	
Sector	Amount (Cr₹)
Healthcare	20,097
Telecommunication	17,202
Capital Goods	15,394
Realty	12,918
Chemicals	5,672
Information Technology	3,420
Textiles	2,860
Services	1,045

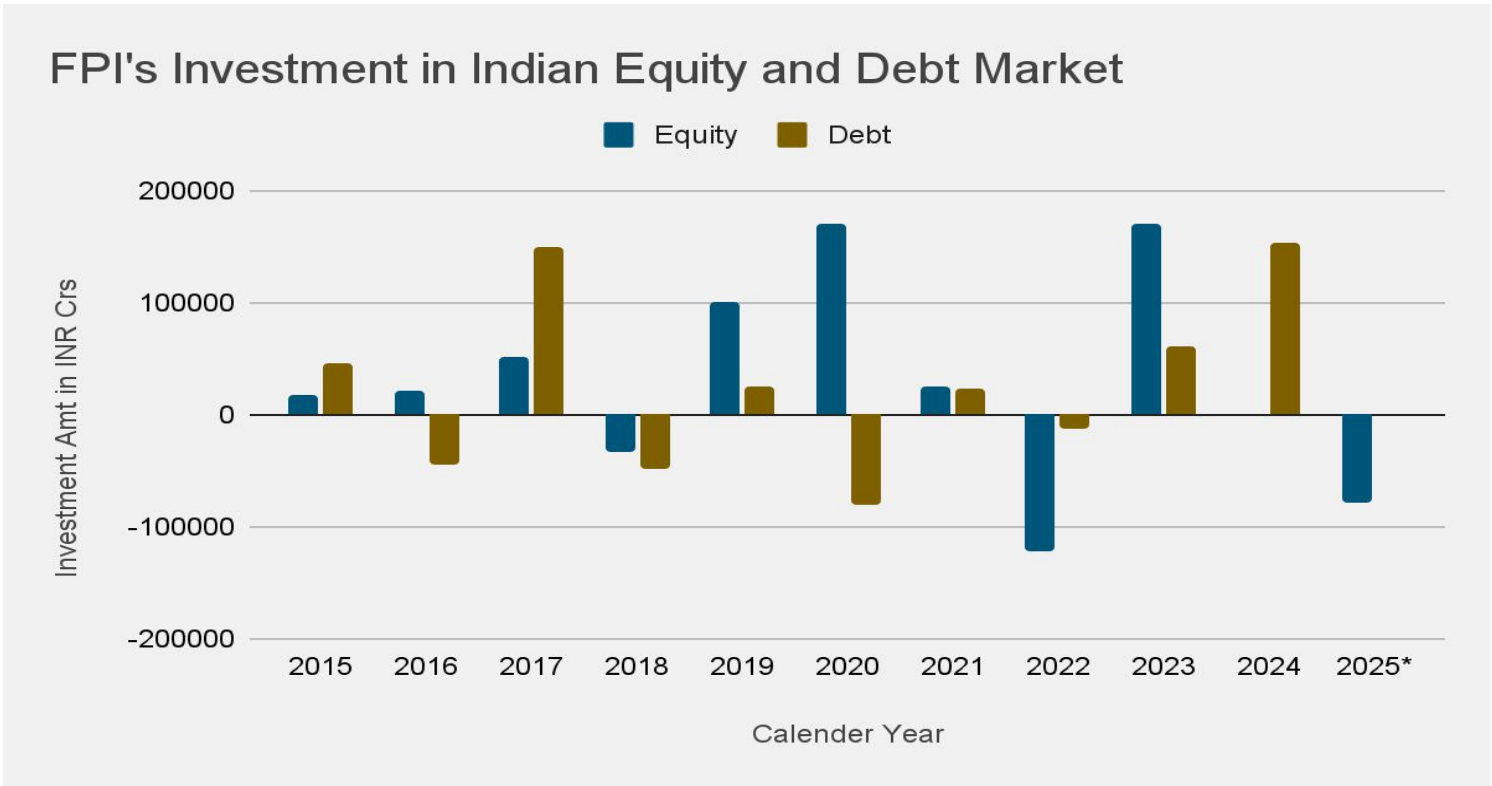
Sector-Wise FPI Equity Sales from Apr,24-Jan,25	
Sector	Amount (Cr₹)
Oil, Gas & Consumable Fuels	-55,557
Financial Services	-46,704
Automobile and Auto Components	-27,606
Fast Moving Consumer Goods	-24,738
Power	-13,121
Construction	-10,436
Construction Materials	-10,367
Metals & Mining	-1,960

\*All data is updated as of 31st January. DII investments include MF investments.

## Equity Investment Breakdown by Participant



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



\*All data is updated as of 31st January. DII investments include MF investments.

Source: NSDL, SEBI