

June Market Pulse: Monthly Investment Insights

June Snapshot: DIIs Power Ahead, FPIs Turn Equity Buyers, Mutual Funds Stay Selective

❖ FPI Buying Back on Track with IPO Push

- **FPIs Stay in Buy Mode for 3rd Straight Month:** Foreign Portfolio Investors (FPIs) turned **net buyers** in **June**, with **₹14,590 Cr equity inflows**, marking their **third consecutive month of investment**. While the **first half** saw mild outflows, **aggressive second-half buying** of ₹19,991 Cr — including **₹6,124 Cr in primary markets (IPOs)** — helped reverse the trend and boost sentiment.
- **Debt Outflows Deepen Amid Global Rate Worries:** FPIs **pulled out ₹22,527 Cr from Indian debt** in June, including **₹5,996 Cr from corporate bonds**, as US Fed uncertainty and elevated global yields weakened the appeal of Indian fixed-income assets.
- **YTD Snapshot:** FPIs remain net equity sellers on a year-to-date basis, **with total outflows of ₹77,901 Cr**, while debt investments have declined to ₹14,121 Cr during the same period.

❖ DII Inflows Surge in June

- **DIIs Record One of the Strongest Monthly Buys:** Domestic Institutional Investors (DIIs) maintained their **bullish momentum**, investing a staggering **₹72,674 Cr** into equities in **June**, surpassing the **₹67,642 Cr** seen in **May**. Both halves of the month witnessed **robust participation**, driven by **long-term conviction** and **domestic economic resilience**.
- **YTD Snapshot:** For the calendar year to date, DIIs have infused over **₹3.57 Lakh Cr** into equities, firmly cementing their position as the **market's stabilizing force** during turbulent times.

❖ Mutual Funds Slow Down but Stay Positive in Equities

- **Mutual Funds Cool Off After May Frenzy:** Mutual Funds poured **₹45,519 Cr** into equities in **June**, easing slightly from their **robust ₹56,302 Cr** inflow in **May**. While the buying spree continued, the **pace moderated in the second half of the month**, hinting at **profit booking** and **tactical realignment** by fund managers.
- **YTD Snapshot:** Cumulatively, Mutual Funds have contributed a significant **₹2.39 Lakh Cr** in equities in 2025 so far, underlining steady SIP-driven flows.

Monthly Investment Insights

Tracking Flows by Market Participants

Market Participants	For the month of June						Jan, 2025 - Jun, 2025	
	Equity (Cr)			Debt (Cr)			Equity (Cr)	Debt (Cr)
	1st - 15th	16th - 30th	Total	1st - 15th	16th - 30th	Total		
FPI	(5,401)	19,991	14,590	(27,063)	4,536	(22,527)	(77,901)	14121
DII	44,151	28,523	72,674	-	-	-	357,575	-
Mutual Funds	30,271	15,248	45,519	(11,914)	(18,998)	(30,911)	238,895	(338,475)

*DII investments include MFs Investments.

Source: NSDL, SEBI, NSE

Mapping FPI Investments: Sector-wise Insights in Indian Equities

Sector Shuffle: FPIs Load Up on Financials & Oil, Trim Power & FMCG

❖ Sectors in Demand: FPIs Chase Financials, Oil & Auto in June

- **Financial Services** led FPI inflows in June with a hefty **₹8,946 Cr**, closely followed by **Oil & Gas** at **₹6,137 Cr**, signaling strong confidence in India's core sectors. A sharp turnaround was seen in **Automobiles** and **Telecommunication**, where early exits flipped into aggressive second-half buying, resulting in net inflows of **₹4,724 Cr** and **₹2,733 Cr** respectively.
- **Chemicals** also drew steady interest with **₹2,392 Cr**, while **Consumer Services** witnessed renewed traction, ending with **₹1,348 Cr**. FPIs added **₹910 Cr** in **Realty** and showed a mild positive stance on **IT**, with net inflows of **₹1,166 Cr**, reversing early selling pressure.

❖ FPIs Exit Power, FMCG & Durables in June

- **Power** led the **FPI outflows** in June with a sharp withdrawal of **₹6,311 Cr**, followed by **FMCG** where net selling amounted to **₹3,985 Cr**, reflecting **profit booking** in defensives. **Consumer Durables** saw an outflow of **₹2,493 Cr**, while **Capital Goods** faced net selling of **₹1,831 Cr** as FPIs rotated away from **cyclical exposures**.
- **Diversified** sectors witnessed net withdrawals of **₹1,162 Cr**, while **Healthcare** and **Metals & Mining** saw outflows of **₹1,092 Cr** and **₹1,016 Cr** respectively. **Construction** too saw mild selling pressure with FPIs pulling out **₹748 Cr**, suggesting a broader **recalibration of sectoral positions**.

Sector-Wise FPI Equity Purchases: June 2025 (Amount in Crs)				Sector-Wise FPI Equity Sales: June 2025 (Amount in Crs)			
Sector	1st - 15th	16th - 30th	Total	Sector	1st - 15th	16th - 30th	Total
Financial Services	4,685	4,261	8,946	Power	(3,120)	(3,191)	(6,311)
Oil & Gas	1,199	4,938	6,137	FMCG	(3,626)	(359)	(3,985)
Automobile	(296)	5,020	4,724	Consumer Durables	(1,893)	(600)	(2,493)
Telecommunication	(887)	3,620	2,733	Capital Goods	1,191	(3,022)	(1,831)
Chemicals	1,405	987	2,392	Diversified	(353)	(102)	(455)
Consumer Services	(1,461)	2,809	1,348	Healthcare	39	(442)	(403)
Realty	431	910	1,341	Metals & Mining	(558)	201	(357)
IT	(1,713)	2,879	1,166	Construction	(224)	(14)	(238)

Sector-Wise FPI Equity Purchases from Jan-Jun, 25		Sector-Wise FPI Equity Sales from Jan-Jun, 25	
Sector	Amount (Crs)	Sector	Amount (Crs)
Telecommunication	26,685	Information Technology	(30,600)
Financial Services	13,717	Fast Moving Consumer Goods	(18,178)
Services	7,294	Power	(15,422)
Chemicals	5,850	Consumer Durables	(11,896)
Media, Entertainment & Publication	931	Consumer Services	(11,608)
Textiles	530	Automobile and Auto Components	(11,038)
		Healthcare	(9,490)
		Construction	(9,336)

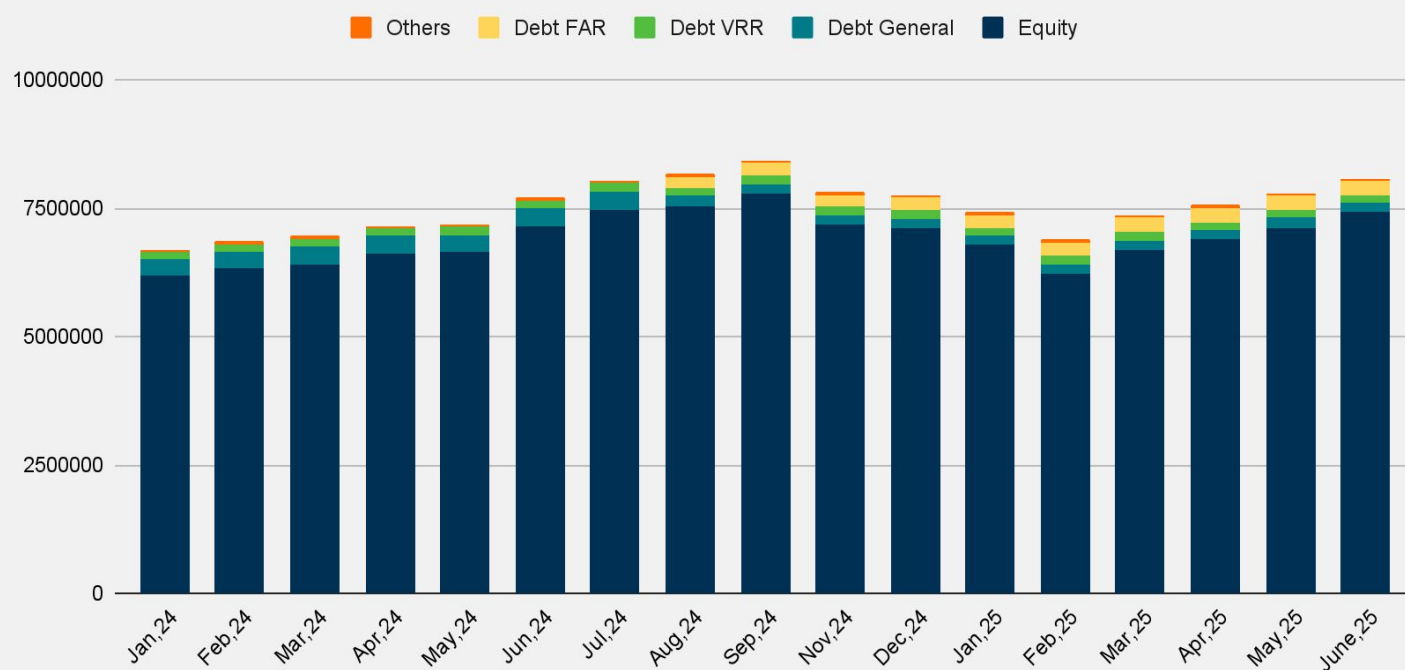
*All data is updated as of 30th June. DII investments include MF investments.

Tracking FPI's AUC in Indian Markets

FPI Holdings Jump ₹2.8 Lakh Cr in June, Cross ₹80 Lakh Cr for First Time in 2025

- **Total Foreign Portfolio Investors AUC(Assets Under Custody)** rose to **₹80.83 Lakh Cr** in June, up from **₹78.03 Lakh Cr** in May, marking a monthly increase of **₹2.8 Lakh Cr**. The surge was primarily driven by **equity AUC**, which jumped from **₹71.26 Lakh Cr** in May to **₹74.19 Lakh Cr** in June – an addition of nearly **₹2.93 Lakh Cr**, reflecting strong market performance and inflows.
- **Debt segments** (General, VRR, FAR) saw a marginal decline, especially **Debt FAR**, down from ₹2.68 Lakh Cr to **₹2.54 Lakh Cr**, in line with the **June net debt outflow** by FPIs. Despite muted flows in debt, the **overall AUC crossed the ₹80 Lakh Cr mark** for the first time in CY25.
- Over H1CY25, **FPI total AUC increased by ₹3.18 Lakh Cr**, from **₹77.64 Lakh Cr in December** to **₹80.83 Lakh Cr in June**. The growth was led by **equities**, which contributed the bulk of the gain – rising **₹2.99 Lakh Cr** over the six-month period.

Asset Under Custody(AUC) of FPIs (INR Cr)

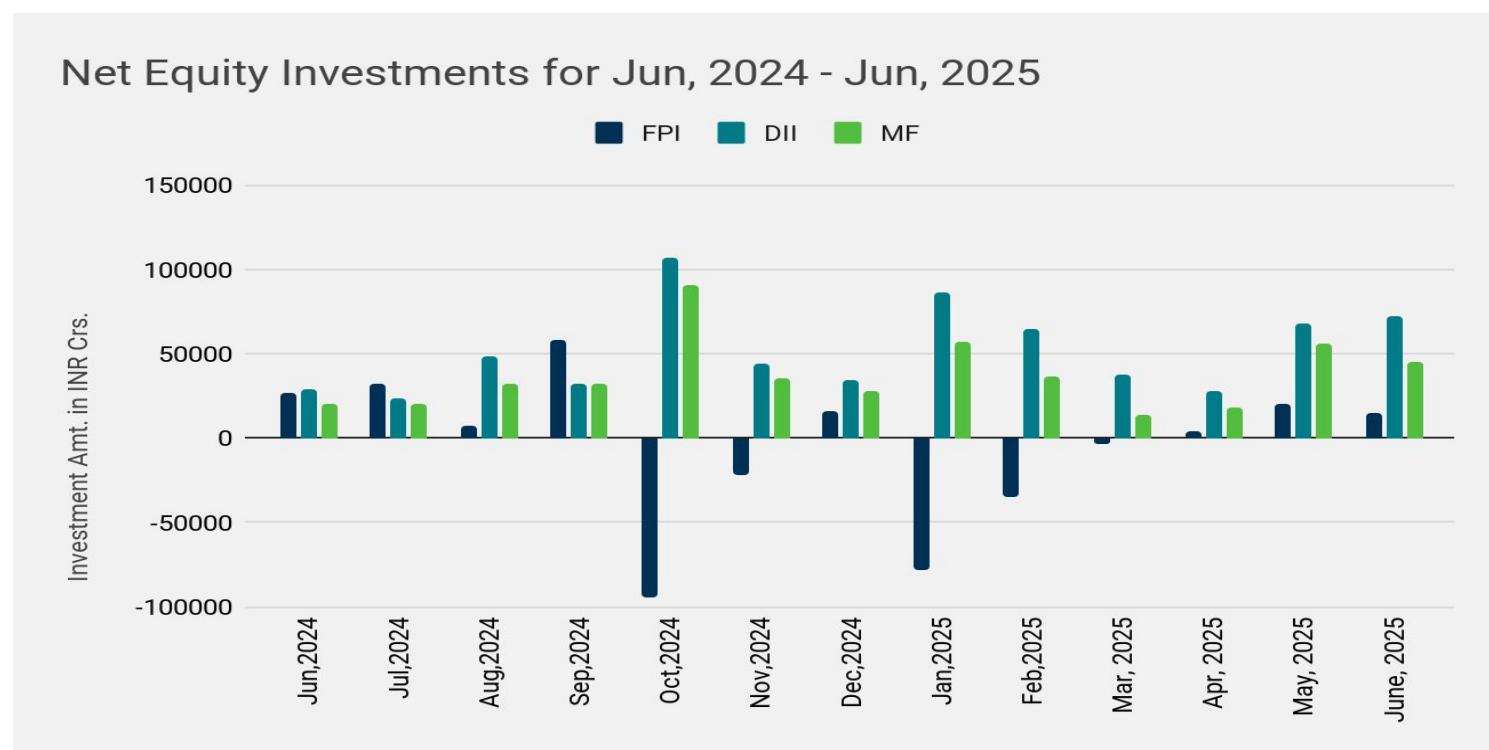


Indian Benchmark Indices: Tracking Performance

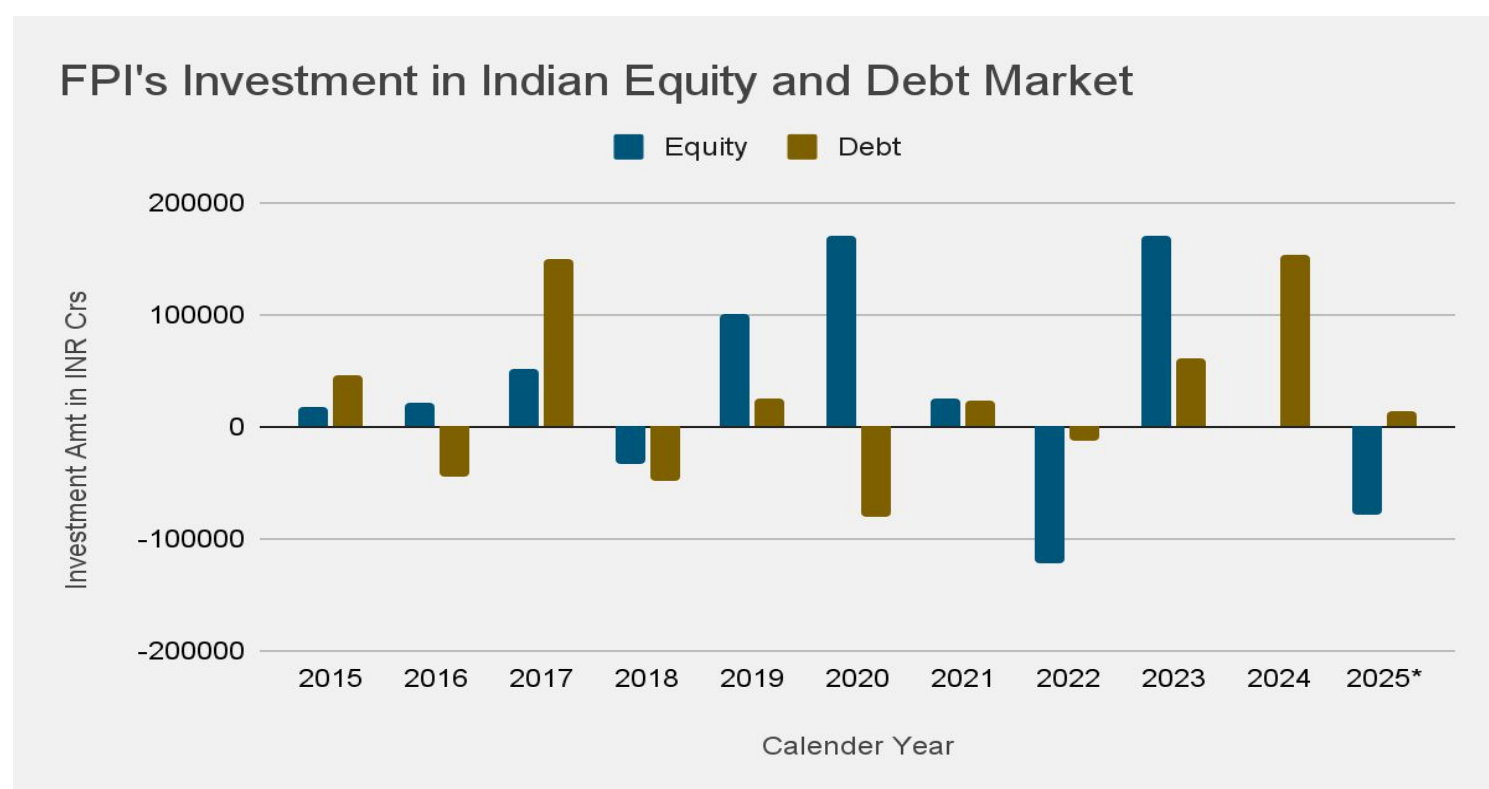
Absolute Returns: A Snapshot of Indices Performance(%)

Benchmark	June	H1CY25
Sensex	2.65	7.00
Nifty 50	3.10	7.92
Nifty Midcap 150	4.09	4.01
Nifty Smallcap 250	5.73	0.26

Equity Investment Breakdown by Participant



FPI's Strategic Investments in Equity and Debt Markets



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Source: NSDL, SEBI