



EQUITY

MF Activity Report

November 2024

(What MFs Bought & Sold For The Month)


TOP BUYS & SELLS ACROSS MF INDUSTRY - LARGE CAP
TOP 10 BUYS

Name	Market Value (Rs in Lakhs)		No Of Shares (in Lakhs)	
	Oct-24	Nov-24	Oct-24	Nov-24
Punjab National Bank	446,335	631,785	4,559.10	6,022.73
Varun Beverages Ltd.	573,921	779,453	960.13	1,254.75
Adani Ports and Special Economic Zone Ltd.	1,211,074	1,325,899	880.08	1,114.21
Adani Energy Solutions Ltd.	154,259	166,015	158.02	197.52
Zomato Ltd.	3,134,006	4,187,229	12,963.83	14,967.22
Bajaj Finserv Ltd.	1,279,820	1,295,032	730.95	819.66
Indusind Bank Ltd.	1,949,020	2,056,904	1,846.34	2,065.39
Trent Ltd.	2,416,561	2,544,233	339.01	374.41
Havells India Ltd.	491,931	564,689	300.25	328.69
Britannia Industries Ltd.	1,046,104	978,172	182.66	197.96

TOP 10 SELLS

Name	Market Value (Rs in Lakhs)		No Of Shares (in Lakhs)	
	Oct-24	Nov-24	Oct-24	Nov-24
Adani Enterprises Ltd.	871,384	647,415	295.66	262.84
JSW Energy Ltd.	216,550	197,947	318.85	302.37
Power Grid Corporation Of India Ltd.	3,773,863	3,716,456	11,762.03	11,281.59
Indian Railway Catering & Tourism Corporation Ltd.	217,150	206,927	264.40	253.60
Hindustan Aeronautics Ltd.	1,472,454	1,490,586	346.73	332.95
HDFC Bank Ltd.	27,402,805	27,264,731	15,788.49	15,178.88
Macrotech Developers Ltd.	69,265	69,304	57.42	55.30
Zydus Lifesciences Ltd.	691,590	654,299	690.73	677.36
HCL Technologies Ltd.	4,025,598	4,142,527	2,279.18	2,241.46
Grasim Industries Ltd.	1,215,847	1,159,051	451.01	444.72

Data as on 30th November 2024

Source: MFI Explorer, W2W MF Research


TOP BUYS & SELLS ACROSS MF INDUSTRY - MID CAP
TOP 10 BUYS

Name	Market Value (Rs in Lakhs)		No Of Shares (in Lakhs)	
	Oct-24	Nov-24	Oct-24	Nov-24
Housing & Urban Development Corporation Ltd. (HUDCO)	31,916	53,294	146.92	223.35
Mazagon Dock Shipbuilders Ltd.	63,823	101,747	15.64	22.15
KEI Industries Ltd.	535,575	722,575	132.18	167.52
Yes Bank Ltd.	15,586	18,894	764.00	946.58
Aditya Birla Capital Ltd.	151,552	172,441	745.72	887.36
Indraprastha Gas Ltd.	309,719	281,776	737.16	861.57
UPL Ltd. (Erstwhile United Phosphorus Ltd.)	361,363	381,529	652.69	753.53
Marico Ltd.	478,469	553,251	747.61	857.82
ZF Commercial Vehicle Control Systems India Ltd.	527,687	518,756	36.72	41.56
Cochin Shipyard Ltd.	117,726	137,808	78.63	87.37

TOP 10 SELLS

Name	Market Value (Rs in Lakhs)		No Of Shares (in Lakhs)	
	Oct-24	Nov-24	Oct-24	Nov-24
The New India Assurance Company Ltd.	3,642	1,784	18.59	9.18
Tata Elxsi Ltd.	85,119	50,781	12.12	7.61
Oberoi Realty Ltd.	718,823	629,070	365.48	313.38
Voltas Ltd.	1,282,795	1,155,986	777.69	697.11
BSE Ltd.	613,661	582,877	137.42	124.79
Alkem Laboratories Ltd.	1,034,917	930,258	179.07	164.87
Tata Technologies Ltd.	99,733	86,156	99.11	91.80
Godrej Properties Ltd.	366,481	329,403	127.44	118.65
Coforge Ltd.	1,938,044	2,077,634	254.20	239.20
Vodafone Idea Ltd.	251,836	245,570	31,014.31	29,374.35

Data as on 30th November 2024

Source: MFI Explorer, W2W MF Research


TOP BUYs & SELLs ACROSS MF INDUSTRY - SMALL CAP
TOP 10 BUYs

Name	Market Value (Rs in Lakhs)		No Of Shares (in Lakhs)	
	Oct-24	Nov-24	Oct-24	Nov-24
Shakti Pumps (India) Ltd.	56,770	54,245	12.63	69.52
Chennai Petroleum Corporation Ltd.	2,702	10,210	4.22	16.29
Wockhardt Ltd.	55,013	164,365	45.53	117.05
JTL Industries Ltd.	6,314	8,066	32.13	79.29
Easy Trip Planners Ltd.	1,096	1,107	33.17	61.56
Mahanagar Gas Ltd.	80,855	92,332	56.09	77.48
Patel Engineering Ltd.	890	1,253	17.26	23.54
MOIL Ltd.	10,373	13,170	31.48	41.71
Nazara Technologies Ltd.	73,253	97,824	77.69	98.51
Equinox India Developments Ltd.	23,442	36,287	212.45	264.96

TOP 10 SELLs

Name	Market Value (Rs in Lakhs)		No Of Shares (in Lakhs)	
	Oct-24	Nov-24	Oct-24	Nov-24
Electrosteel Castings Ltd.	16,892	5,545	102.53	36.34
Dish TV India Ltd.	4,179	1,742	323.74	161.27
DCM Shriram Ltd.	5,477	3,365	5.23	2.92
BLS International Services Ltd.	22,341	12,550	56.15	32.31
Freshworks Inc.	5,888	5,559	5.98	4.11
Interarch Building Products Ltd.	14,267	8,598	8.12	5.62
Thirumalai Chemicals Ltd.	2,980	2,611	9.78	6.95
Honasa Consumer Ltd.	52,853	25,433	134.09	96.36
Indegene Ltd.	24,431	21,181	38.99	31.05
Ircon International Ltd.	6,692	5,144	30.75	24.52

Data as on 30th November 2024

Source: MFI Explorer, W2W MF Research



TOP STOCKS BOUGHT BY AMCs

SBI MUTUAL FUND

Name	Market Value (Rs in Lakhs)		No Of Shares (in Lakhs)	
	Oct-24	Nov-24	Oct-24	Nov-24
Varun Beverages Ltd.	5,156	29,507	8.63	47.50
Shakti Pumps (India) Ltd.	23,718	20,187	5.28	25.87
Astral Ltd. (Erstwhile Astral Poly Technik Ltd.)	594	2,610	0.34	1.46
Dalmia Bharat Ltd.	1,428	5,893	0.78	3.24
Housing & Urban Development Corporation Ltd. (Hudco)	267	1,035	1.23	4.34
CARE Ratings Ltd.	1,317	4,381	0.90	2.89
Mahanagar Gas Ltd.	557	1,224	0.39	1.03
Au Small Finance Bank Ltd.	10,328	24,228	16.86	41.53
Easy Trip Planners Ltd.	132	150	3.99	8.34
Marico Ltd.	6,131	12,084	9.58	18.74

ICICI PRUDENTIAL MUTUAL FUND

Name	Market Value (Rs in Lakhs)		No Of Shares (in Lakhs)	
	Oct-24	Nov-24	Oct-24	Nov-24
Kirloskar Ferrous Industries Ltd.	5	412	0.01	0.69
PNB Housing Finance Ltd.	233	4,021	0.24	4.51
Housing & Urban Development Corporation Ltd. (Hudco)	364	3,210	1.68	13.45
Teamlease Services Ltd.	13	108	0.47	3.71
Chennai Petroleum Corporation Ltd.	1,433	8,826	2.24	14.08
HFCL Ltd.	258	1,201	2.12	9.31
KEI Industries Ltd.	20,139	51,711	4.97	11.99
Gulf Oil Lubricants India Ltd.	1,002	2,224	0.85	2.01
Supreme Industries Ltd.	1,158	2,719	0.27	0.58
Easy Trip Planners Ltd.	47	53	1.42	2.96

Data as on 30th November 2024

Source: MFI Explorer, W2W MF Research



TOP STOCKS BOUGHT BY AMCs

HDFC MUTUAL FUND

Name	Market Value (Rs in Lakhs)		No Of Shares (in Lakhs)	
	Oct-24	Nov-24	Oct-24	Nov-24
Wockhardt Ltd.	3,488	25,657	2.89	18.27
Suzlon Energy Ltd.	1,607	8,706	24.01	138.23
Manappuram Finance Ltd.	752	2,637	4.79	16.88
Adani Energy Solutions Ltd.	20,858	55,732	21.37	66.31
Easy Trip Planners Ltd.	115	138	3.47	7.65
JSW Steel Ltd.	82,269	163,440	85.36	169.19
Orient Electric Ltd.	742	1,219	3.00	5.20
Zomato Ltd.	98,555	195,112	407.67	697.43
Punjab National Bank	16,036	28,346	163.80	270.22
Indraprastha Gas Ltd.	91,075	115,247	216.77	352.38

AXIS MUTUAL FUND

Name	Market Value (Rs in Lakhs)		No Of Shares (in Lakhs)	
	Oct-24	Nov-24	Oct-24	Nov-24
Welspun Corporation Ltd.	11	12,552	0.01	16.2
Pfizer Ltd.	9	139	0.00	0.03
Neuland Laboratories Ltd.	537	3,611	0.04	0.22
Chambal Fertilisers & Chemicals Ltd.	284	1,685	0.59	3.27
Punjab National Bank	2,453	8,949	25.0	85.3
360 ONE WAM LTD.(Erstwhile IIFL WEALTH MANAGEMENT LIMITED)	976	2,226	0.89	2.00
Muthoot Finance Ltd.	586	1,190	0.30	0.62
Easy Trip Planners Ltd.	2	3	0.07	0.14
Dr. Lal Path Labs Ltd.	39	74	0.01	0.02
RBL Bank Ltd.	1,963	3,257	11.5	21.0

Data as on 30th November 2024

Source: MFI Explorer, W2W MF Research



TOP STOCKS BOUGHT BY AMCs

NIPPON INDIA MUTUAL FUND

Name	Market Value (Rs in Lakhs)		No Of Shares (in Lakhs)	
	Oct-24	Nov-24	Oct-24	Nov-24
Indiamart Intermesh Ltd.	818	1,738	0.33	0.74
Aditya Birla Capital Ltd.	48,285	60,857	24.80	48.22
360 ONE WAM LTD.(Erstwhile IIFL WEALTH MANAGEMENT LIMITED)	1,667	2,117	1.44	2.06
Marico Ltd.	36,449	38,437	14.25	20.08
Mahanagar Gas Ltd.	30,623	30,112	0.61	0.77
Bajaj Auto Ltd.	4,027	4,333	6.29	7.94
Afcons Infrastructure Ltd.	16,766	18,802	23.42	28.97
HFCL Ltd.	56,614	53,355	9.42	11.47
Interglobe Aviation Ltd.	553	576	28.91	34.98
Punjab National Bank	230,357	271,416	493.21	580.14

SHRIRAM MUTUAL FUND

Name	Market Value (Rs in Lakhs)		No Of Shares (in Lakhs)	
	Oct-24	Nov-24	Oct-24	Nov-24
Divi Laboratories Ltd.	83	947	0.01	0.16
Indian Hotels Co. Ltd.	83	562	0.12	1.19
Grasim Industries Ltd.	109	597	0.03	0.26
PB Fintech Ltd.	49	221	0.05	0.30
Muthoot Finance Ltd.	84	242	0.06	0.32
Oracle Financial Services Software Ltd.	277	682	0.01	0.05
HCL Technologies Ltd.	567	1,054	0.11	0.55
Oil India Ltd.	99	173	0.10	0.45
Hindustan Aeronautics Ltd.	200	332	0.03	0.10
Aurobindo Pharma Ltd.	212	267	0.06	0.19

Data as on 30th November 2024

Source: MFI Explorer, W2W MF Research

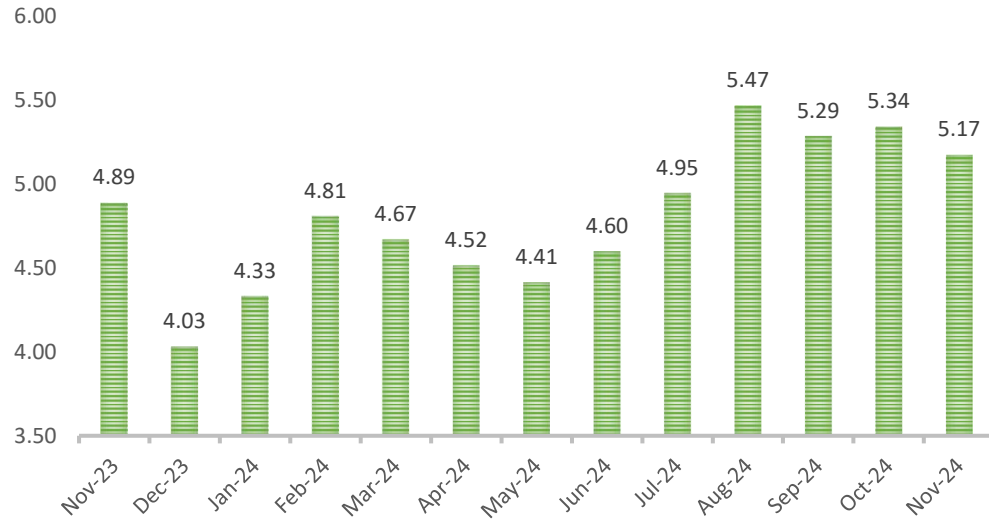


SECTOR HOLDINGS

Sector Name							
	May-24	Jun-24	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24
Automobile and Auto Components	7.94	8.08	8.01	8.00	8.12	7.95	7.81
Capital Goods	7.98	7.88	7.42	7.04	7.02	7.09	7.22
Chemicals	2.23	2.31	2.43	2.38	2.40	2.40	2.35
Construction	--	--	--	--	--	--	0.01
Construction Materials	3.44	3.17	3.32	3.16	3.06	3.15	3.15
Consumer Durables	2.04	2.11	2.02	1.96	2.00	2.04	2.03
Consumer Services	3.24	3.38	3.47	3.51	3.61	3.46	3.41
Diversified	3.54	3.61	3.63	3.95	4.11	3.95	4.38
Fast Moving Consumer Goods	0.10	0.10	0.10	0.10	0.10	0.10	0.09
Financial Services	5.28	5.17	5.55	5.62	5.69	5.57	5.49
Forest Materials	28.27	28.11	27.09	26.87	27.03	27.86	27.75
Healthcare	0.11	0.12	0.11	0.11	0.12	0.12	0.12
Information Technology	7.07	6.96	7.27	7.55	7.41	7.70	7.55
Media, Entertainment & Publication	7.87	8.43	9.06	9.34	8.99	9.06	9.41
Metals & Mining	0.37	0.32	0.34	0.33	0.32	0.31	0.32
Miscellaneous	2.62	2.47	2.32	2.29	2.45	2.37	2.27
Oil, Gas & Consumable Fuels	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Power	7.37	7.22	7.24	7.21	6.85	6.49	6.37
Realty	3.65	3.51	3.66	3.56	3.66	3.54	3.32
Services	1.30	1.27	1.23	1.18	1.25	1.18	1.17
Telecommunication	2.09	2.06	2.08	2.14	2.08	1.99	2.04
Textiles	2.94	3.11	3.02	3.06	3.08	3.01	3.07
Utilities	0.57	0.59	0.61	0.62	0.63	0.66	0.67



INDUSTRY CASH LEVELS (% OF TOTAL EQUITY AUM)



Data as on 30th November 2024
Source: MFI Explorer, W2W MF Research

UNIQUE STOCKS BOUGHT BY MUTUAL FUNDS

Name	Market Value (Rs in Lakhs)	
	Nov-24	Nov-24
NTPC Green Energy Ltd.	400564	3,209
Sagility India Ltd.	80216	2,167
Swiggy Ltd.	537746	1,142
Niva Bupa Health Insurance Company Ltd.	38449	510
Acme Solar Holdings Ltd	70952	259
Zinka Logistics Solutions Ltd.	42093	155
Enviro Infra Engineers Ltd.	8678	42
Suraksha Diagnostic Ltd	17100	39
Kilburn Engineering Ltd.	2772	6

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Source: MFI Explorer, W2W MF Research

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