



EQUITY

MF Activity Report

January 2025

(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)	
	Dec-24	Jan-25	Dec-24	Jan-25
Shriram Finance Ltd.(Erstwhile Shriram Transport Finance Company Limited)	11,47,147	10,83,432	397.05	1,992.52
Macrotech Developers Ltd.	98,956	1,08,031	71.22	89.69
JSW Energy Ltd.	2,24,564	2,15,045	349.43	422.82
Varun Beverages Ltd.	8,82,879	8,32,202	1,382.74	1,550.45
Axis Bank Ltd.	92,17,469	94,37,019	8,656.95	9,569.82
Godrej Consumer Products Ltd.	8,15,946	9,31,884	754.07	831.11
Pidilite Industries Ltd.	5,99,849	6,38,887	206.54	222.48
Zomato Ltd.	43,98,940	37,43,662	15,820.94	16,989.62
Hindalco Industries Ltd.	17,98,216	19,02,747	2,984.86	3,201.66
GAIL (India) Ltd.	12,61,559	12,38,058	6,605.62	6,989.82

TOP 10 SELLS

Name	Market Value (Rs in Lakhs)		No Of Shares (in Lakhs)	
	Dec-24	Jan-25	Dec-24	Jan-25
Adani Green Energy Ltd.	59,069	44,827	56.76	44.94
Havells India Ltd.	5,23,404	4,53,982	312.46	289.86
Indian Railway Finance Corporation Ltd.	49,603	46,995	332.81	311.35
Hero Motocorp Ltd.	13,47,294	13,37,940	323.82	308.34
Bank Of Baroda	11,97,684	10,12,555	4,978.96	4,745.09
Cholamandalam Investment & Finance Company Ltd.	13,33,387	13,85,323	1,124.32	1,077.36
Adani Energy Solutions Ltd.	1,84,735	1,64,340	229.14	219.60
Bajaj Finserv Ltd.	12,84,122	13,67,043	818.91	787.35
Hindustan Aeronautics Ltd.	12,97,968	11,78,955	310.64	299.47
Power Finance Corporation Ltd.	17,16,682	15,60,887	3,827.65	3,694.40

Data as on 31st January 2025

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)	
	Dec-24	Jan-25	Dec-24	Jan-25
Adani Wilmar Ltd.	1,679	2,89,535	5.45	1,085.82
IDBI Bank Ltd.	2,073	4,790	27.10	59.05
Indraprastha Gas Ltd.	3,86,340	3,72,008	929.48	1,843.45
Hindustan Zinc Ltd.	19,747	26,033	44.48	57.83
IDFC First Bank Ltd. (Erstwhile IDFC Bank Ltd.)	2,13,846	2,47,109	3,386.85	3,907.49
Godrej Properties Ltd.	4,73,436	4,54,173	169.90	194.97
Yes Bank Ltd.	46,667	51,837	2,382.16	2,695.61
Aditya Birla Capital Ltd.	1,59,528	1,82,010	897.13	1,014.60
IRB Infrastructure Developers Ltd.	1,59,816	1,78,857	2,792.04	3,120.33
One 97 Communications Ltd.	7,27,454	6,16,101	714.70	794.20

TOP 10 SELLS

Name	Market Value (Rs in Lakhs)		No Of Shares (in Lakhs)	
	Dec-24	Jan-25	Dec-24	Jan-25
Tata Technologies Ltd.	69,862	45,436	78.38	57.69
Poonawalla Fincorp Ltd. (Erstwhile Magma Fincorp Ltd.)	1,40,434	1,03,499	446.74	333.44
UPL Ltd. (Erstwhile United Phosphorus Ltd.)	3,56,341	3,56,341	3,56,341	3,56,341
Tata Chemicals Ltd.	2,78,158	2,25,522	264.36	228.70
Steel Authority Of India Ltd.	2,37,603	1,97,454	2,100.27	1,837.99
Mangalore Refinery & Petrochemicals Ltd.	36,060	28,397	242.97	219.28
Kalyan Jewellers India Ltd.	9,30,112	5,51,366	1,213.85	1,095.94
Endurance Technologies Ltd.	2,14,032	1,83,192	99.55	92.08
Polycab India Ltd.	9,47,060	7,34,046	130.23	121.57
Star Health and Allied Insurance Company Ltd.	2,91,143	2,51,373	613.00	580.20

Data as on 31st January 2025

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)	
	Dec-24	Jan-25	Dec-24	Jan-25
Garware Technical Fibres Ltd.	89,699	80,420	18.85	97.98
PTC India Ltd.	877	4,500	6.05	31.25
Optiemus Infracom Ltd.	2,183	7,907	3.13	12.17
Brooks Laboratories Ltd.	1,825	4,628	10.13	29.16
Surya Roshni Ltd.	4,013	3,643	6.75	13.88
Senco Gold Ltd.	64,980	58,476	60.58	124.47
Welspun Enterprises Ltd.	13,055	22,944	21.25	38.00
South Indian Bank Ltd.	24,784	45,349	990.58	1,752.27
Onesource Speciality Pharma Ltd.	87,569	1,43,896	52.86	90.99
Happy Forgings Ltd.	70,772	1,16,471	70.88	109.79

TOP 10 SELLs

Name	Market Value (Rs in Lakhs)		No Of Shares (in Lakhs)	
	Dec-24	Jan-25	Dec-24	Jan-25
Suven Life Sciences Ltd.	2,920	3	22.82	0.02
Avantel Ltd.	3,260	1,249	21.27	9.13
Epack Durable Ltd.	3,849	1,612	6.96	3.48
TVS Supply Chain Solutions Ltd.	1,916	786	10.71	5.51
Aarti Pharmalabs Ltd.	24,458	12,561	35.64	21.49
Dilip Buildcon Ltd.	40,217	24,741	89.29	56.93
GMR Power And Urban Infra Ltd.	2,846	1,682	23.55	15.78
Bajaj Housing Finance Ltd.	49,280	30,402	386.76	261.16
Waaree Energies Ltd.	1,19,174	68,912	41.75	28.80
MOIL Ltd.	20,085	13,560	60.63	44.26

Data as on 31st January 2025

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)	
	Dec-24	Jan-25	Dec-24	Jan-25
Deepak Fertilizers & Petrochemicals Corporation Ltd.	570	22,061	0.48	19.42
Gujarat Gas Ltd.	461	6,750	0.93	13.89
Mazagon Dock Shipbuilders Ltd.	357	4,595	0.16	1.84
Concord Biotech Ltd.	585	4,107	0.26	1.91
Mangalore Chemicals & Fertilizers Ltd.	118	850	0.77	5.07
Dalmia Bharat Ltd.	7,270	47,700	4.11	25.56
Garware Technical Fibres Ltd.	33,789	30,860	7.10	37.60
Shriram Finance Ltd.(Erstwhile Shriram Transport Finance Company Limited)	1,89,044	1,60,986	65.43	296.07
Astral Ltd. (Erstwhile Astral Poly Technik Ltd.)	3,045	11,897	1.84	7.89
One 97 Communications Ltd.	1,849	5,967	1.82	7.69

ICICI PRUDENTIAL MUTUAL FUND

Name	Market Value (Rs in Lakhs)		No Of Shares (in Lakhs)	
	Dec-24	Jan-25	Dec-24	Jan-25
Adani Wilmar Ltd.	173	85,684	0.56	321.33
Vinati Organics Ltd.	119	8,713	0.07	5.21
India Cements Ltd.	123	790	0.33	2.99
Shriram Finance Ltd.(Erstwhile Shriram Transport Finance Company Limited)	39,970	38,540	13.83	70.88
Jubilant Ingrevia Ltd.	158	677	0.19	0.97
Ashok Leyland Ltd.	2,404	8,401	10.90	38.74
Advanced Enzyme Technologies Ltd.	3,038	9,840	8.72	29.84
PB Fintech Ltd.	10,403	27,681	4.93	16.03
Kirloskar Ferrous Industries Ltd.	685	1,823	1.07	3.20
Mahanagar Gas Ltd.	1,932	5,419	1.50	3.93

Data as on 31st January 2025

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)	
	Dec-24	Jan-25	Dec-24	Jan-25
Global Health Ltd.	192	2,678	0.18	2.58
Colgate Palmolive (India) Ltd.	5,013	28,351	1.87	10.05
Shriram Finance Ltd.(Erstwhile Shriram Transport Finance Company Limited)	87,632	82,396	30.33	151.53
FSN E-Commerce Ventures Ltd.	7,634	34,208	46.62	202.54
Godrej Properties Ltd.	11,862	33,305	4.26	14.30
Vishal Mega Mart Pvt. Ltd. (Erstwhile Rishanth Wholesale Trading Pvt. Ltd.)	29,191	78,943	274.28	731.29
Alkem Laboratories Ltd.	2,612	5,604	0.46	1.11
NMDC Ltd.	2,115	4,929	32.09	74.57
Indraprastha Gas Ltd.	1,53,911	1,60,752	370.29	796.59
Yes Bank Ltd.	1,630	3,353	83.20	174.35

AXIS MUTUAL FUND

Name	Market Value (Rs in Lakhs)		No Of Shares (in Lakhs)	
	Dec-24	Jan-25	Dec-24	Jan-25
Aptus Value Housing Finance India Ltd.	7	9,413	0.025	31.06
Praj Industries Ltd.	12	2,779	0.01	4.40
PTC Industries Ltd.	9	1,947	0.00	0.14
IRB Infrastructure Developers Ltd.	14	120	0.24	2.09
Hitachi Energy India Ltd.	8,586	30,497	0.60	2.37
Shriram Finance Ltd.(Erstwhile Shriram Transport Finance Company Limited)	12,791	7,932	4.43	14.59
Maruti Suzuki India Ltd.	14,515	46,433	1.34	3.77
One 97 Communications Ltd.	830	1,782	0.82	2.30
Jio Financial Services Ltd.	3,301	6,955	11.05	28.78
Petronet Lng Ltd.	1,738	3,284	5.02	10.38

Data as on 31st January 2025

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)	
	Dec-24	Jan-25	Dec-24	Jan-25
Adani Wilmar Ltd.	594	59,999	1.93	225.01
Craftsman Automation Ltd.	768	17,280	0.14	4.14
Sumitomo Chemical India Ltd.	763	10,477	1.43	20.48
Navin Fluorine International Ltd.	2,154	16,485	0.66	3.97
Shriram Finance Ltd.(Erstwhile Shriram Transport Finance Company Limited)	58,092	57,106	20.11	105.02
Indiamart Intermesh Ltd.	1,698	6,110	0.76	2.96
Mahanagar Gas Ltd.	1,872	4,702	1.46	3.41
JBM Auto Ltd.	398	433	0.26	0.54
Biocon Ltd.	16,623	32,442	45.50	89.48
Indraprastha Gas Ltd.	30,548	28,728	73.49	142.36

SHRIRAM MUTUAL FUND

Name	Market Value (Rs in Lakhs)		No Of Shares (in Lakhs)	
	Dec-24	Jan-25	Dec-24	Jan-25
IPCA Laboratories Ltd.	108	1,705	0.06	1.18
BSE Ltd.	126	1,362	0.02	0.26
Himadri Speciality Chemical Ltd.	42	183	0.07	0.37
Fortis Healthcare Ltd.	329	1,488	0.46	2.33
One 97 Communications Ltd.	460	1,610	0.45	2.07
Blue Star Ltd.	278	940	0.13	0.52
Bajaj Holdings & Investment Ltd.	445	1,034	0.04	0.09
Lupin Ltd.	1,379	2,726	0.59	1.31
Infosys Ltd.	205	434	0.11	0.23
Aditya Birla Sun Life Amc Ltd.	170	207	0.20	0.30

Data as on 31st January 2025

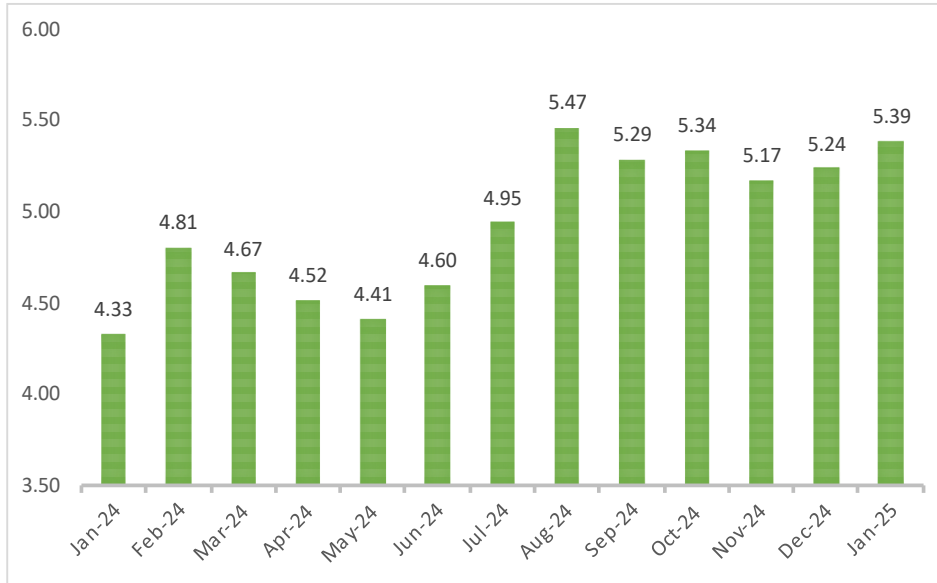
Source: MFI Explorer, W2W MF Research


SECTOR HOLDINGS
INDUSTRY WISE HOLDINGS

Sector Name								
	Jun-24	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25
Automobile and Auto Components	8.43	8.36	8.26	8.29	8.06	7.89	7.67	7.91
Capital Goods	7.43	7.05	6.70	6.77	6.84	6.99	6.84	6.36
Chemicals	2.34	2.44	2.37	2.37	2.39	2.35	2.26	2.33
Commodity	0.09	0.09	0.09	0.09	0.09	0.10	0.09	0.06
Construction	3.19	3.37	3.20	3.11	3.17	3.15	3.14	3.10
Construction Materials	2.09	2.02	1.94	1.98	2.00	1.99	1.99	2.11
Consumer Durables	3.37	3.48	3.53	3.62	3.48	3.41	3.57	3.24
Consumer Services	3.68	3.70	4.00	4.19	4.02	4.46	4.77	4.46
Diversified	0.10	0.11	0.10	0.10	0.10	0.09	0.09	0.09
Fast Moving Consumer Goods	5.08	5.55	5.60	5.67	5.50	5.39	5.34	5.48
Financial Services	27.57	26.40	26.28	26.65	27.44	27.23	26.84	27.20
Forest Materials	0.12	0.11	0.11	0.13	0.13	0.12	0.11	0.11
Healthcare	6.93	7.30	7.56	7.42	7.68	7.54	8.03	7.73
Information Technology	8.44	9.13	9.41	8.94	9.03	9.41	9.64	9.77
Media, Entertainment & Publication	0.33	0.35	0.34	0.33	0.32	0.32	0.29	0.26
Metals & Mining	2.11	1.99	1.92	2.03	2.01	2.01	1.90	1.91
Miscellaneous	-0.06	-0.11	-0.06	-0.07	-0.03	0.00	0.01	0.06
Oil, Gas & Consumable Fuels	7.03	6.95	6.95	6.54	6.14	5.98	5.81	6.16
Power	3.47	3.61	3.52	3.57	3.45	3.26	3.13	3.13
Realty	1.21	1.17	1.11	1.20	1.12	1.13	1.17	1.06
Services	1.95	1.96	1.99	1.92	1.89	1.94	2.00	1.95
Telecommunication	3.03	2.97	3.05	3.13	3.04	3.07	3.04	3.19
Textiles	0.62	0.64	0.64	0.65	0.68	0.69	0.73	0.67
Utilities	0.01	0.01	0.01	0.01	0.01	0.02	0.02	0.02
Total	98.56	98.65	98.63	98.63	98.57	98.54	98.49	98.35



INDUSTRY CASH LEVELS (% OF TOTAL EQUITY AUM)



Data as on 31st January 2025

Source: MFI Explorer, W2W MF Research

UNIQUE STOCKS BOUGHT BY MUTUAL FUNDS

Name	Market Value (Rs in Lakhs)	
	Jan-25	Jan-25
Dr. Agarwals Health Care Ltd.	18650	46
ITC Hotels Ltd.	221320	1,355
Laxmi Dental Ltd.	29953	61
Quadrant Future Tek Ltd.	10162	18
Standard Glass Lining Technologies Ltd.	6158	37

Data as on 31st January 2025

Source: MFI Explorer, W2W MF Research

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