



EQUITY

MF Activity Report

July 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)	
	Jun-25	Jul-25	Jun-25	Jul-25
Lodha Developers Ltd.	115,479	170,912	83.43	138.77
Samvardhana Motherson International Ltd. (Erstwhile Motherson Sumi Systems Ltd.)	1,756,573	1,624,200	11,345.17	16,715.05
CG Power & Industrial Solutions Ltd.	934,844	1,085,272	1,370.44	1,640.13
Canara Bank	440,395	480,347	3,856.35	4,478.76
Swiggy Ltd.	992,444	1,146,448	2,478.63	2,839.50
State Bank Of India	9,481,860	10,242,714	11,558.31	12,858.98
Cholamandalam Investment & Finance Company Ltd.	1,715,740	1,637,138	1,053.89	1,134.38
Info Edge (India) Ltd.	1,035,364	1,036,155	695.67	744.20
Tata Consultancy Services Ltd.	6,474,798	6,045,562	1,870.31	1,990.72
Havells India Ltd.	545,850	559,964	351.91	373.16

TOP 10 SELLs

Name	Market Value (Rs in Lakhs)		No Of Shares (in Lakhs)	
	Jun-25	Jul-25	Jun-25	Jul-25
Zydu Lifesciences Ltd.	692,996	508,068	700.03	523.89
Coal India Ltd.	3,201,347	2,388,682	8,167.74	6,346.91
Power Grid Corporation Of India Ltd.	4,245,391	3,467,031	14,156.52	11,914.45
ABB India Ltd.	585,504	476,070	96.29	86.40
Indian Oil Corporation Ltd.	663,937	596,630	4,517.84	4,097.09
Dr Reddys Laboratories Ltd.	1,610,648	1,471,092	1,255.08	1,158.07
Indian Railway Finance Corporation Ltd.	47,638	40,140	336.14	312.76
Interlobe Aviation Ltd.	3,938,179	3,638,810	658.94	615.65
Varun Beverages Ltd.	1,021,902	1,097,353	2,233.42	2,099.79
Cipla Ltd.	2,625,673	2,551,641	1,743.59	1,641.35

Data as on 31st July 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)	
	Jun-25	Jul-25	Jun-25	Jul-25
Ashok Leyland Ltd.	575,334	544,291	2,292.99	4,496.41
Motherson Sumi Wiring India Ltd.	384,076	356,601	6,431.28	9,611.87
HDB Financial Services Ltd.	140,782	545,614	190.25	719.29
Oberoi Realty Ltd.	631,792	683,777	331.54	419.47
360 ONE WAM LTD.(Erstwhile IIFL WEALTH MANAGEMENT LIMITED)	293,702	320,530	245.88	304.48
Container Corporation Of India Ltd.	435,664	407,410	573.39	704.62
L&T Finance Ltd.(Erstwhile L&T Finance Holding Ltd.)	416,236	480,032	2,020.46	2,369.48
Housing & Urban Development Corporation Ltd. (Hudco)	106,386	107,271	447.83	505.35
Motilal Oswal Financial Services Ltd.	253,548	297,562	291.42	326.63
Yes Bank Ltd.	153,539	157,177	7,548.59	8,307.44

TOP 10 SELLs

Name	Market Value (Rs in Lakhs)		No Of Shares (in Lakhs)	
	Jun-25	Jul-25	Jun-25	Jul-25
Indian Renewable Energy Development Agency (Ireda)	26,895	10,151	158.09	68.88
Hindustan Copper Ltd.	80,159	9,496	287.00	39.02
ACC Ltd.	433,106	326,314	225.91	182.46
Tata Technologies Ltd.	45,983	39,756	64.67	56.61
Hindustan Zinc Ltd.	153,018	126,989	339.40	299.47
Balkrishna Industries Ltd.	961,102	936,144	393.04	349.80
Aditya Birla Fashion & Retail Ltd.	91,780	79,953	1,223.73	1,097.20
Mangalore Refinery & Petrochemicals Ltd.	28,492	22,965	198.78	182.10
Indraprastha Gas Ltd.	318,960	291,285	1,463.99	1,420.55
Gland Pharma Ltd.	924,198	1,018,058	504.03	493.05

Data as on 31st July 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)	
	Jun-25	Jul-25	Jun-25	Jul-25
SBFC Finance Ltd.	177,219.19	166,753	1,580.48	1,592.37
CESC Ltd.	400,818.83	399,099	2,333.73	2,354.43
Krishna Institute of Medical Sciences Ltd.	756,377	852,091	1,122.89	1,134.31
Restaurant Brands Asia Ltd.	141,957	141,913	1,719.65	1,742.98
Niva Bupa Health Insurance Company Ltd.	122,545	133,186	1,498.65	1,521.25
Carborundum Universal Ltd.	504,476	494,198	522.53	531.05
PNC Infratech Ltd.	201,245	207,772	652.12	663.17
Nippon Life India Asset Management Ltd.	449,022	464,689	561.24	572.03
Aptus Value Housing Finance India Ltd.	239,989	247,463	740.82	755.27
EIH Ltd.	292,344	303,792	791.51	809.03

TOP 10 SELLs

Name	Market Value (Rs in Lakhs)		No Of Shares (in Lakhs)	
	Jun-25	Jul-25	Jun-25	Jul-25
Dreamfolks Services Ltd.	3,912	457	16.48	3.33
Utkarsh Small Finance Bank Ltd.	1,515	398	61.91	18.20
Capital Small Finance Bank Ltd.	6,008	2,112	20.52	6.94
HP Adhesives Ltd.	612	229	11.84	4.69
Radiant Cash Management Services Ltd.	1,539	578	24.19	10.11
Orient Cement Ltd.	3,136	1,510	12.96	6.11
Enviro Infra Engineers Ltd.	5,455	3,147	23.05	12.44
NRB Bearings Ltd.	64,040	34,768	211.70	120.30
Fiem Industries Ltd.	61,520	35,158	31.93	18.28
D.B.Corp Ltd.	33,053	18,046	116.12	66.90

Data as on 31st July 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)	
	Jun-25	Jul-25	Jun-25	Jul-25
Aditya Birla Sun Life Amc Ltd.	463	3,147	0.58	3.67
HDB Financial Services Ltd.	17,300	77,648	23.38	102.36
Titagarh Rail Systems Ltd.	603	2,373	0.64	2.76
L&T Finance Ltd.(Erstwhile L&T Finance Holding Ltd.)	547	2,136	2.66	10.55
Oberoi Realty Ltd.	36,636	1,24,347	19.23	76.28
Patanjali Foods Ltd.	5,461	21,155	3.31	11.29
Syngene International Ltd.	3,829	11,118	5.99	15.57
Central Depository Services (India) Ltd.	2,553	4,872	1.42	3.29
Kalyan Jewellers India Ltd.	5,423	13,038	9.76	21.92
Poonawalla Fincorp Ltd. (Erstwhile Magma Fincorp Ltd.)	1,075	2,186	2.31	5.18

ICICI PRUDENTIAL MUTUAL FUND

Name	Market Value (Rs in Lakhs)		No Of Shares (in Lakhs)	
	Jun-25	Jul-25	Jun-25	Jul-25
Akzo Nobel India Ltd.	169	43,504	0.05	11.54
Emcure Pharmaceuticals Ltd.	92	6,446	0.07	4.57
Amara Raja Energy & Mobility Ltd.	397	13,806	0.41	14.33
Finolex Industries Ltd.	175	3,108	0.80	15.07
Inventurus Knowledge Solutions Ltd.	120	1,708	0.07	1.08
Aadhar Housing Finance Ltd.(Erstwhile DHFL Vysya Housing Finance Ltd.)	136	1,076	0.30	2.12
JB Chemicals & Pharmaceuticals Ltd.	1,183	7,660	0.70	4.33
Titagarh Rail Systems Ltd.	454	2,483	0.48	2.89
Ajanta Pharmaceuticals Ltd.	556	1,747	0.22	0.63
Ashok Leyland Ltd.	23,956	32,854	95.48	271.41

Data as on 31st July 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)	
	Jun-25	Jul-25	Jun-25	Jul-25
Oberoi Realty Ltd.	1,743	15,249	0.91	9.35
TBO TEK Ltd.	458	1,581	0.33	1.17
PG Electroplast Ltd.	1,067	3,664	1.41	4.51
KFIN Technologies Ltd.	1,538	3,349	1.14	3.09
ICICI Prudential Life Insurance Company Ltd.	9,077	18,506	13.80	30.05
CG Power & Industrial Solutions Ltd.	19,944	41,765	29.24	63.12
Sagar Cements Ltd.	2,115	4,612	8.84	18.93
Dodla Dairy Ltd.	13,253	24,466	9.24	19.24
IFGL Refractories Ltd.	17,743	15,884	33.97	67.94
Insecticides India Ltd.	25,538	56,542	26.38	52.73

AXIS MUTUAL FUND

Name	Market Value (Rs in Lakhs)		No Of Shares (in Lakhs)	
	Jun-25	Jul-25	Jun-25	Jul-25
360 ONE WAM LTD.(Erstwhile IIFL WEALTH MANAGEMENT LIMITED)	36	4,599	0.03	4.37
APL Apollo Tubes Ltd.	47	3,622	0.03	2.26
Gland Pharma Ltd.	3,496	28,291	1.91	13.70
Tube Investments Of India Ltd.	2,911	15,760	0.94	5.55
Glenmark Pharmaceuticals Ltd.	1,475	8,269	0.84	3.87
HDB Financial Services Ltd.	10,000	31,480	13.51	41.50
Syrma SGS Technology Ltd.	944	3,758	1.66	4.97
Ellenbarrie Industrial Gases Ltd.	4,010	17,005	10.03	29.44
Lodha Developers Ltd.	1,408	3,290	1.02	2.67
NMDC Ltd.	1,026	2,469	14.66	34.88

Data as on 31st July 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)	
	Jun-25	Jul-25	Jun-25	Jul-25
HDB Financial Services Ltd.	15,000	96,210	20.27	126.83
LIC Housing Finance Ltd.	5,536	21,661	8.95	36.96
Sharda Motor Industries Ltd.	7,794	12,227	4.15	11.63
Amber Enterprises India Ltd.	2,628	7,700	0.39	0.97
L&T Finance Ltd.(Erstwhile L&T Finance Holding Ltd.)	12,934	30,927	62.79	152.66
Ashok Leyland Ltd.	72,370	70,080	288.43	578.94
ICRA Ltd.	20,523	37,255	3.03	5.62
Blue Star Ltd.	38,350	68,778	23.45	39.57
KEI Industries Ltd.	11,190	18,735	2.95	4.87
Akums Drugs & Pharmaceuticals Ltd.	5,821	8,132	9.94	15.66

SHRIRAM MUTUAL FUND

Name	Market Value (Rs in Lakhs)		No Of Shares (in Lakhs)	
	Jun-25	Jul-25	Jun-25	Jul-25
CSB Bank Ltd. (Formerly The Catholic Syrian Bank Ltd.)	185	1,197	0.47	2.85
Tech Mahindra Ltd.	186	897	0.11	0.61
REC Ltd.	222	836	0.55	2.12
Can Fin Homes Ltd.	291	839	0.37	1.12
Tata Consultancy Services Ltd.	521	994	0.15	0.33
Coforge Ltd.	364	699	0.19	0.40
Infosys Ltd.	537	1,067	0.34	0.71
Cholamandalam Financial Holdings Ltd.	599	1,073	0.28	0.57
Force Motors Ltd.	659	1,328	0.04	0.08
Mahindra & Mahindra Ltd.	1,125	2,161	0.35	0.67

Data as on 31st July 2025

Source: MFI Explorer, W2W MF Research



SECTOR HOLDINGS

INDUSTRY WISE HOLDINGS

Sector Name								
	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25	Jul-25
Automobile and Auto Components	7.8	8.0	7.8	7.56	7.62	7.87	7.58	7.56
Capital Goods	6.7	6.3	5.6	6.00	5.92	6.56	6.52	6.64
Chemicals	2.2	2.3	2.2	2.34	2.41	2.50	2.46	2.48
Construction	3.2	3.1	3.0	3.02	2.84	2.99	2.90	2.92
Construction Materials	2.0	2.1	2.2	2.25	2.21	2.04	2.04	2.09
Consumer Durables	3.6	3.2	3.3	3.14	3.08	3.09	3.24	3.47
Consumer Services	4.7	4.5	4.5	4.45	4.50	4.44	4.83	5.00
Diversified	0.1	0.1	0.1	0.07	0.07	0.07	0.06	0.07
Fast Moving Consumer Goods	5.4	5.5	5.4	5.43	5.45	5.48	5.05	5.28
Financial Services	27.5	28.0	29.4	29.56	30.08	29.54	29.67	29.59
Forest Materials	0.1	0.1	0.1	0.09	0.09	0.09	0.10	0.09
Healthcare	8.0	7.7	7.8	7.85	7.73	7.56	7.52	7.94
Information Technology	9.5	9.8	9.5	8.64	8.34	8.27	8.31	7.89
Media, Entertainment & Publication	0.3	0.2	0.2	0.22	0.22	0.22	0.21	0.20
Metals & Mining	2.2	2.2	2.3	2.39	2.20	2.23	2.25	2.23
Miscellaneous	0.0	0.0	0.0	0.04	0.03	0.04	0.04	0.04
Oil, Gas & Consumable Fuels	6.3	6.5	6.5	6.69	6.89	6.57	6.57	6.23
Power	3.2	3.2	3.2	3.42	3.35	3.07	3.21	3.07
Realty	1.2	1.1	1.0	1.00	1.03	1.14	1.07	1.11
Services	2.1	2.1	2.0	2.02	2.00	2.27	2.33	2.26
Telecommunication	3.0	3.2	3.2	3.24	3.33	3.24	3.38	3.19
Textiles	0.7	0.6	0.6	0.57	0.59	0.70	0.63	0.61
Utilities	0.0	0.0	0.0	0.03	0.03	0.03	0.03	0.03



INDUSTRY CASH LEVELS (% OF TOTAL EQUITY AUM)



Data as on 31st July 2025

Source: MFI Explorer, W2W MF Research

UNIQUE STOCKS BOUGHT BY MUTUAL FUNDS

Name	Market Value (Rs in Lakhs)	
	Jul-25	Jul-25
Brigade Hotel Ventures Ltd.	30725	360
Anthem Biosciences Ltd.	268648	354
Indiqube Spaces Ltd.	31946	146
Travel Food Services Ltd.	69918	67
Sri Lotus Developers And Realty Ltd.	8000	53
National Securities Depository Ltd.	41079	51
M & B Engineering Ltd	17250	45
Smartworks Coworking Spaces Ltd.	15019	35
Aditya Infotech Ltd.	23649	35
Petroleo Brasileiro Sa Petrobras	30965	28
Crizac Ltd.	9237	28
Gng Electronics Ltd.	7851	24

Data as on 31st July 2025

Source: MFI Explorer, W2W MF Research



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