

Investment by EPFO

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Investment of funds is made as per the Pattern of Investment notified by the Department of Financial Services, Ministry of Finance, Government of India vide Notification number 11/14/2013-PR dated 2nd March, 2015 as amended from time to time and guidelines issued by CBT, EPF from time to time. Accordingly, EPFO has investment in both Debt Securities and Exchange Traded Funds as per prescribed pattern. As per approval of 207th meeting of the Central Board of Trustees, EPF held on 31.03.2015, EPFO has started investment in Exchange Traded Funds from August 2015 onwards.

Total corpus of various funds managed by EPFO was Rs. 24.75 Lakh Crore as on 31.03.2024.

(Rs in Crs)

Debt Investments (including amount held in Public Account of India)	ETF Investments
22,40,922.30	2,34,921.49

EPFO regularly invests in Equity markets through Exchange Traded Funds (ETFs) replicating BSE-SENSEX and NSE NIFTY-50 indices. In addition, EPFO has also invested from time-to-time in ETFs constructed specifically for disinvestment of shareholding of the Government of India in body corporates, namely ETFs tracking Bharat 22 and CPSE Indices.

Year-wise investments made by EPFO in ETFs is as below:-

EPFO's ETF investment data in last 7 years (Rs. in Crores)

Financial Year	ETF
2017-18	22,765.99
2018-19	27,974.25
2019-20	31,501.11
2020-21	32,070.84
2021-22	43,568.08
2022-23	53,081.26
2023-24	57,184.24
2024-25 (up to October 2024)	34,207.93

EPFO does not invest directly in any of the individual stocks in equity market.

This information was given by Union Minister of State for Labour and Employment, Sushri Shobha Karandlaje in a written reply in Lok Sabha today.

Himanshu Pathak

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