# Wright.

Empowering the Right Investment

STRICTLY CONFIDENTIAL

## Quantitative Genius, Optimized Returns

Hi, I am Sonam Srivastava!

I am a globally recognized quant researcher with 10+ years experience at HSBC, Edelweiss. I am a IIT Kanpur graduate who built a 500 cr+ successful advisory business using quant strategies which I believe can revolutionize the PMS market as well.

- India's premier quantitative portfolio management fund.
- Thousands investors have fallen in love with our quantitative philosophy in last 4 years
- PMS managing 90 cr is AUM in 6 months, 32%+ outperformance over benchmark
- In smallcase we have delivered excellent performance - 330% returns in 4 years (100% above benchmark)
- Efficient use of factor investing, regime modeling, artificial intelligence in forecasting and allocation strategies.

Invest in the Future of Investing with Wright Research!

# Investing Philosophy

### Factor Investing
Finding what drives the market

### Momentum Investing
In line with the trends

### Artificial Intelligence
Finding complex patterns

### Risk Management
Stronger in tough times

### Tactical Investing
For dynamic markets of India

### Hedging
Protect and grow in the downside

# Investing Philosophy

Our unique models allocates to mutual funds in five baskets of different risk profiles based on quantitative asset allocation models with focus on returns at low risk.

Direct Funds

Growth Options

Asset Allocation

Diverse Categories

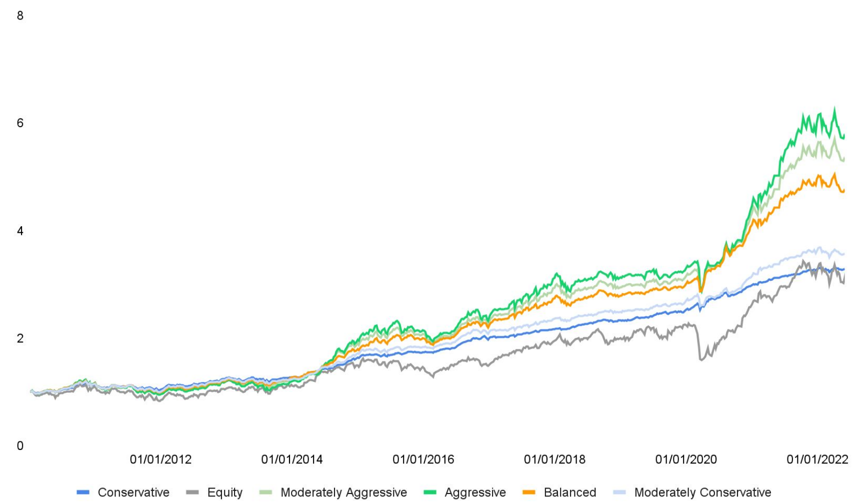
Tactical

Quantitative Models

Dynamic, Cost Aware

AI Driven Regimes

Position Sizing



## Wright Factor Fund

The objective of the portfolio is long-term wealth generation at a low risk using tactical allocation to debt mutual funds and ETFS in the market within appropriate risk management. Investment decisions will be taken after rigorous research and due diligence while factoring for risk exposures leading to an appropriate fair value. We believe our investment approach ensures building a portfolio with long term wealth generation prospects within the appropriate risk return parameters.

Minimum Investment
**Rs. 50 lac**

Rebalancing Frequency
**Six Monthly**

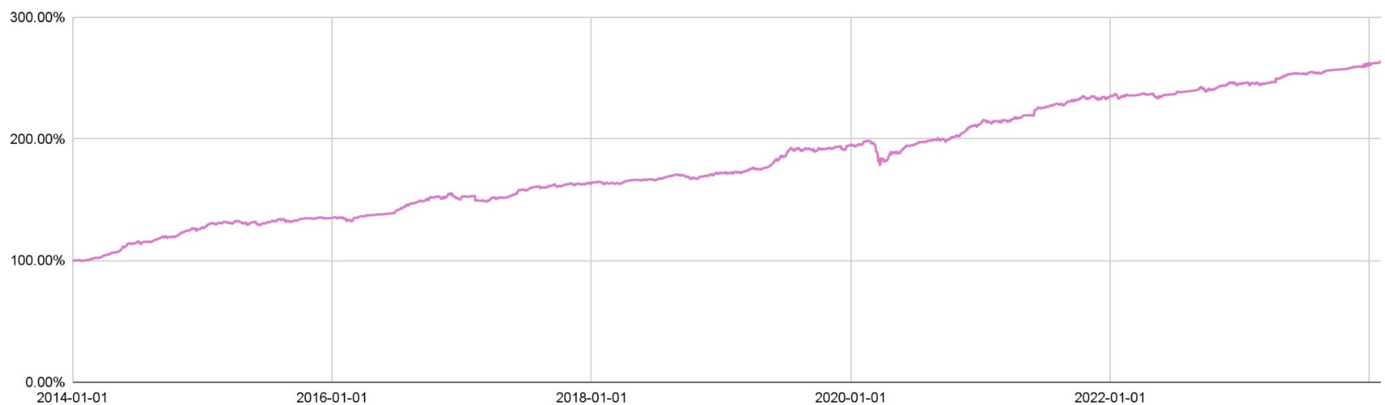
Universe
**Debt Mutual Funds**

Number of MFs
**5-10**

Per Fund Allocation
**<20%**

Backtested Performance - Wright Factor Fund

| | 1-mth | 3-mth | 6-mth | YTD | 1-yr | 3-yr |
|---|---|---|---|---|---|---|
| **WDF** | 0.4% | 2.1% | 3.6% | 0.6% | 7.4% | 7.3% |




| 10 years | **WDF** |
|---|---|
| Annualized Returns | 10.0% |
| Annualized Volatility | 3.7% |
| Worst Drawdown | -10.0% |
| Correlation | 40.1% |
| Sharpe Ratio | 96.6% |

## Contact Us

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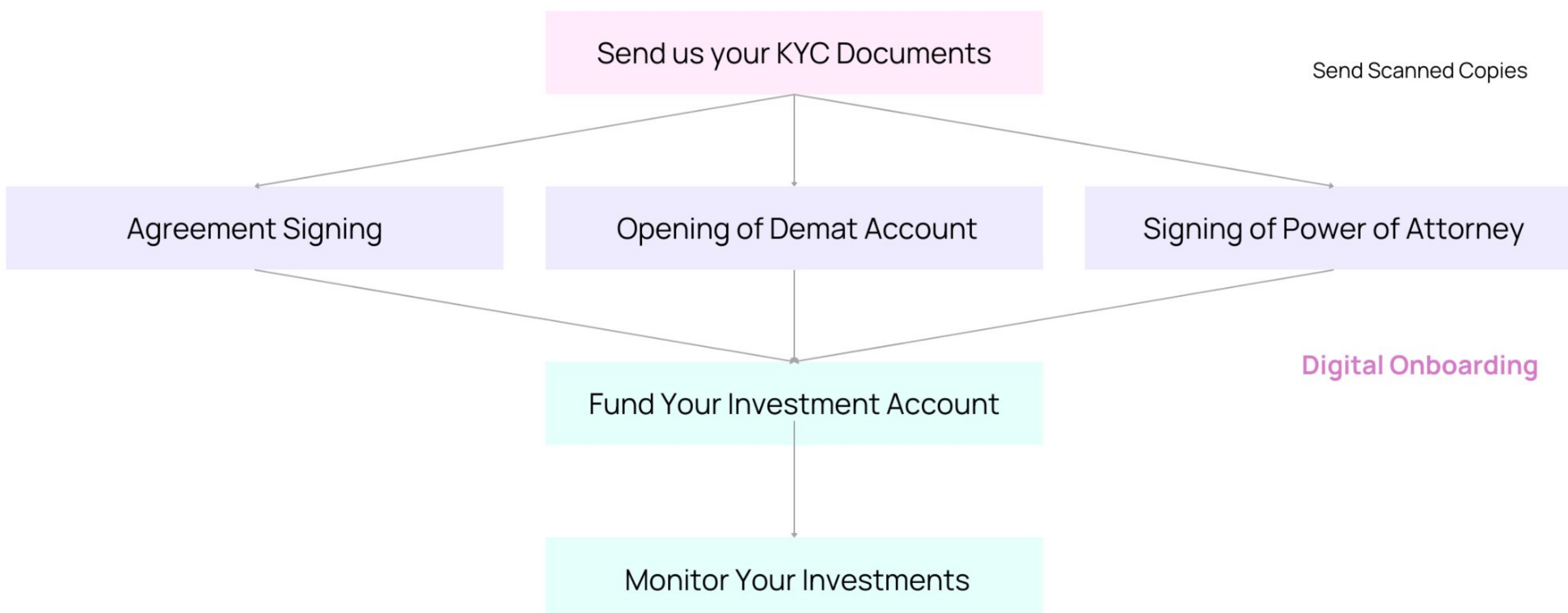
## A easy to follow assisted process



## Competitive Pricing

| Fund Management Fee | Operational Charges |
|---|---|
| Cost Structure I - Flat Fee | Broking Fee (4 bps) |
| Cost Structure II - Variable Fee, Fixed Hurdle | Custody + Demat + Fund Accounting (5 bps) |
| Cost Structure III - Variable Fee, Variable Hurdle | Bank Charges, RTA Charges, Audit |
| | Entry/Exit Load - None |

# Disclaimer

Wryght Research & Capital Private Limited (hereinafter referred to as “the Company”) is a SEBI registered Portfolio Manager having registration number - INP000007979.. The registered address of the company is 102, Shagun Vatika, Prag Narayan Road, Lucknow - 226001. The Company is involved in portfolio management and investment advisory activities in Indian capital markets.

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• Unless otherwise stated, the percentage returns displayed on the website or any other marketing materials are Absolute Returns.

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• The backtesting results do not reflect the results of actual trading or the effect of material economic and market conditions on the decision-making process, but were achieved by means of retrospective application, which may have been designed with the benefit of hindsight. Calculation of such back-tested performance data is based on assumptions integral to the model which may or may not be testable and are therefore subject to losses. Actual performance may differ significantly from back-tested performance. Back-tested results are not adjusted to reflect the reinvestment of dividends and other income and, except where otherwise indicated, do not include the effect of back-tested transaction costs. Back-tested returns do not represent actual returns and should not be interpreted as an indication of such.

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• While we endeavour to update the information / material on various products and reports created by us, on a reasonable basis, there may be regulatory, compliance or other reasons that prevent us from doing so.

• We and our associates, officers, directors, and employees, Investment Advisor (including relatives) worldwide may: (a) from time to time, have long or short positions in, and buy or sell the securities thereof, of company (ies) forming part of the products or reports created by the company or (b) may have other potential/material conflict of interest with respect to any company(ies) in various products or reports created by the company. Any such positions of conflict of interest will be appropriately disclosed and dealt with in accordance with applicable law.

• The Company does not provide any promise or assurance of favourable view for a particular industry or sector or business group in any manner. The investor is requested to take into consideration all the risk factors including their financial condition, suitability to risk return profile and take professional advice before investing.

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