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Wright HNI Quant Advantage Model

Data driven multifactor investing strategy exclusively for HNI with active need based rebalances.

Investment Objective

This is a medium to high risk strategy which aims to outperform in all stages of the market cycle, the volatile and the trending. This is achieved by dynamic allocation to various factors and asset classes based on the changing market regime.

Investment Mechanism

The strategy seeks to achieve its investment objective through a diversified, multi-factor approach to take advantage of structural inefficiencies within the Indian equity market. The strategy is managed systematically and uses a combination of equity factor like momentum, low volatility, efficiency, value, growth etc along with machine learning driven risk modelling. We do asset allocation to 4 asset classes - equities, bonds, gold and liquid instruments

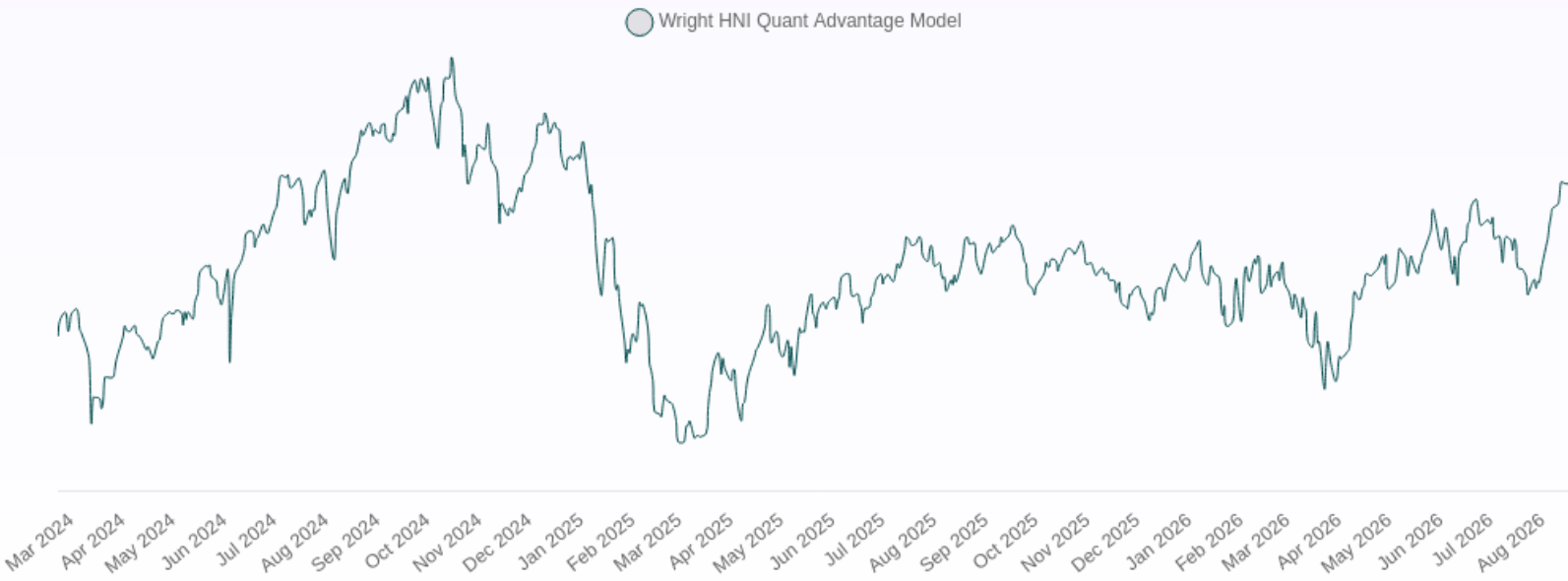
Minimum Investment
Rs. 508631

Rebalancing Frequency
Monthly

	Inception	MTD	1M	3M	6M	1Y	2Y	3Y	YTD
Hni-Quant-Plus	6.5	11.5	-4.4	1.7	2.0	-1.7	-4.4	0.4	11.6
BSE 500	4.9	-0.6	-0.2	3.4	0.8	3.8	-1.4	1.0	-2.2

10 Years Expected Performance	**Hni-Quant-Plus**	**BSE 500**
Annualized Returns	6.5	4.9
Annualized Risk	21.3	14.7
Sharpe Ratio	30.3	33.1
Max Drawdown	-30.3	-19.3
Corr	83.6	-

Portfolio Performance



Note: Live performance includes rebalances. It is a tool to communicate factual return information and should not be seen as advertisement or promotion.

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Month-on-Month Performance

month	1	2	3	4	5	6	7	8	9	10	11	12
2024	0.00	1.20	-3.50	4.80	1.50	6.80	5.20	3.50	3.20	-4.30	-2.40	1.20
2025	-15.40	-10.30	8.30	1.80	5.00	2.60	2.00	-1.90	-2.00	3.00	-2.50	1.80
2026	-1.90	0.90	-9.50	9.80	6.30	0.10	-4.40	11.50	0.00	0.00	0.00	0.00

Organisation Overview



Sonam Srivatsava
Founder, Portfolio Manager

- 10+ years experience in Quantitative Trading and Portfolio Management
- HSBC, Edelweiss, Qplum
- IIT Kanpur graduate, Masters in Financial Engineering Worldquant University



Vinod Reddy Kotha
CTO

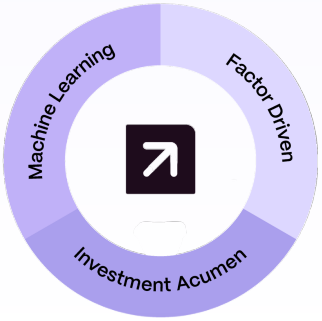
- 9+ years in Software Development
- Housing.com, Testbook.com, Buyceps.com
- B.Tech, CSE, IIT Bombay



Dr Miquel Alonso
Advisor, Machine Learning

- Founder Artificial Intelligence in Finance Institute
- Faculty - CQF, Columbia, NYU
- Executive Director - UBS

Data Driven Organisation



Our Accolades

Fintech Innovator
AI Game Changers
NASSCOM

2 Lakh+
Lifetime Investors

Nidhi SSS Awardee
Govt of India

Top 30 Startups to Watch
Inc42

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Disclosure

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- 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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