

Investment Objective

Invest in Disruptive Innovation : Electric Mobility, Biotech, Ecommerce, Digital Revolution, Fintech This is a high risk equity strategy to invest in stocks with high degrees of innovation.

### Investment Mechanism

Wright Innovation is a data-driven quantitative innovation smart beta strategy investing in Electric Mobility, Biotech, Ecommerce, Digital Revolution, Fintech using position sizing techniques and market regime modelling using machine learning models. This portfolio is expected to generate consistent high returns over time.

Minimum Investment  
**Rs. 69421**

Rebalancing Frequency  
**Monthly**

	Inception	MTD	1M	3M	6M	1Y	2Y	3Y	YTD
Innovation	29.0	7.4	3.1	10.6	21.4	-1.0	20.1	24.3	0.6
Smallcap	20.4	5.2	-4.1	-3.7	17.2	-10.8	18.6	21.4	-3.4

### 10 Years Expected Performance

	Innovation	Smallcap
Annualized Returns	28.8	15.3
Annualized Risk	20.6	38.6
Sharpe Ratio	139.9	39.8
Max Drawdown	-37.8	-50.8
Corr	411	-

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.

## Month-on-Month Performance

month	1	2	3	4	5	6	7	8	9	10	11	12
2014	6.80	2.20	8.60	-0.30	14.60	10.80	2.90	6.00	7.30	2.00	1.60	-1.60
2015	1.50	4.70	-4.70	-7.10	0.80	0.40	11.20	-6.70	1.00	4.40	1.80	1.10
2016	-6.10	-1.90	5.90	1.70	3.60	5.50	4.10	2.80	-0.10	4.70	-1.60	0.50
2017	4.10	4.40	5.60	2.50	0.50	3.80	6.60	5.10	2.70	0.10	8.70	6.10
2018	-0.60	-6.80	-0.40	-2.70	-4.50	-9.30	4.30	11.10	-4.40	-0.40	-2.90	10.40
2019	-2.30	-2.50	-5.50	-5.00	-0.70	-2.30	-11.00	-7.40	4.50	9.80	2.10	8.20
2020	8.40	-5.00	-12.90	7.90	7.40	3.50	17.80	8.40	6.20	4.30	5.00	0.80
2021	4.90	19.40	5.10	11.90	11.50	8.90	7.30	1.80	4.50	2.90	2.90	3.20
2022	-2.40	-11.50	7.30	-3.20	-7.10	-4.40	3.20	7.50	-2.50	5.20	1.10	-4.20
2023	-1.50	-5.30	-1.20	5.80	7.00	10.40	6.80	8.90	1.70	1.70	14.80	6.00
2024	6.80	-3.10	-3.90	7.30	-1.40	6.10	2.70	0.90	1.60	-4.10	4.30	4.00
2025	-15.90	-8.30	2.00	0.20	7.40	5.90	1.20	3.10	7.40	0.00	0.00	0.00

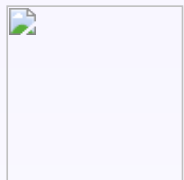
## Organisation Overview



### 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

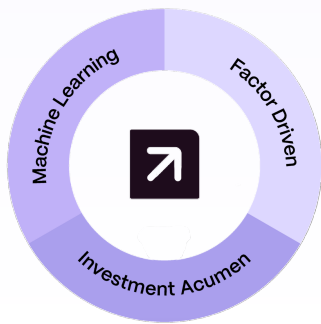


### Dr Miquel Alonso

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**

**50,000+**  
**Active Investors**

**Nidhi SSS Awardee**  
**Govt of India**

**Top 30 Startups to**  
**Watch**  
**Inc42**

## Disclosure


Wright Research & Capital Private Limited (hereinafter referred to as “the Company”) is a SEBI Registered Investment Advisor having registration number - INA100015717 under SEBI (Investment Advisor) Regulations, 2013 and having Principal Officer Siddharth Singh Bhaishora. The registered address of the company is 102, Shagun Vatika, Prag Narayan Road, Lucknow - 226001. The Company is involved in investment advisory activities in Indian capital markets.

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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.
- Information present in the material prepared by the company and on the website of the company shall not be considered as a recommendation or solicitation of an investment or investment strategy. Investors are responsible for their investment decisions and are responsible to validate all the information used to make the investment decision. Investor should understand that his/her investment decision is based on personal investment needs and risk tolerance, and information present in the material prepared by the company and on the website of the company is one among many other things that should be considered while making an investment decision. Past performance does not guarantee future returns and performances of the portfolios created by the company are subject to market risk. Investments in securities market are subject to market risks and investors should read all the related documents carefully before investing. Derivatives are sophisticated investment products. The investor is requested to take into consideration all the risk factors before actually trading in derivative contracts.
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(Validity: Jan 12, 2021 - Perpetual)  
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(Validity: Jul 03, 2024 - Perpetual)  
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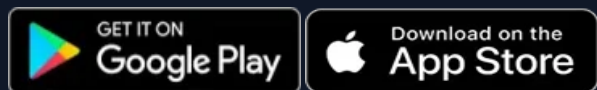
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