Mutual Funds - Balanced

Harmonious balance between risk & growth with Wright Research's Balanced Mutual Fund Basket

Investment Objective

Direct Mutual Funds. Debt Allocation: 40% - 59.99%; No credit risk debt funds

Investment Mechanism

This portfolio is constructed using the best in class MFs in various categories. The allocation to various MFs is done to maximize the expected returns for the given level of risk. The maximum exposure to various sectors & themes is capped. Debt Allocation: 40% - 59.99%; No credit risk debt funds

Minimum Investment
Rs. 10000

Rebalancing Frequency
Half-Yearly

	Inception	MTD	1M	3M	6M	1Y	2Y	3Y	YTD
Mf-Balanced	15.2	1.2	5.1	8.2	5.4	5.4	5.8	12.4	4.8
Nifty	11.5	0.1	2.2	1.6	-3.7	-1.6	-1.1	7.3	-6.6

10 Years Expected Performance	**Mf-Balanced**	**Nifty**
Annualized Returns	15.2	11.5
Annualized Risk	8.6	17.2
Sharpe Ratio	176.7	67.0
Max Drawdown	-13.0	-38.4
Corr	61.3	-

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
2019	0.00	0.00	0.00	0.00	0.00	0.00	-0.30	1.40	-1.40	1.60	0.40	1.50
2020	1.30	1.90	-5.60	11.00	1.00	1.60	7.40	-1.40	3.30	1.90	3.90	6.00
2021	-0.60	0.80	3.40	3.40	1.00	4.10	2.30	0.10	1.40	1.60	-0.40	3.00
2022	-1.70	-1.60	3.80	-3.40	-1.20	-1.80	3.40	0.30	-0.50	2.80	2.10	-2.30
2023	0.30	-0.90	-0.60	1.80	3.20	3.80	3.30	1.80	1.30	-1.70	4.60	4.60
2024	3.00	2.10	-1.30	-0.40	0.90	3.40	6.30	3.70	1.00	-1.20	1.90	1.00
2025	-2.60	-5.40	2.60	1.10	2.20	2.70	-0.50	-1.00	-0.80	2.90	1.20	-0.50
2026	-1.80	-3.20	-3.30	4.00	1.90	1.10	5.10	1.20	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

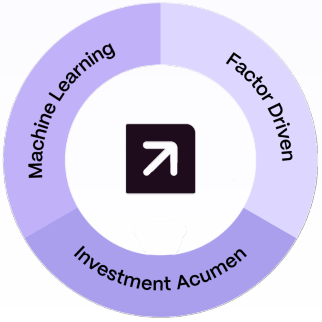


Dr Miquel Alonso

Advisor, Machine Learning

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

Data Driven Organisation



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Inc42

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