

# 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	16.3	1.1	2.9	1.1	5.5	3.7	16.0	14.7	1.9
Nifty	14.2	1.9	4.5	3.9	5.7	6.3	16.1	12.6	10.8

### 10 Years Expected Performance

Annualized Returns

Annualized Risk

Sharpe Ratio

Max Drawdown

Corr

### Mf-Balanced

9.0

8.8

103.3

-40.0

63.5

### Nifty

11.4

21.7

52.7

-59.9

-

## 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
2000	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2001	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2002	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2003	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2004	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2005	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2006	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2007	-0.50	-4.80	-0.60	4.30	4.50	1.90	3.70	-1.00	7.50	6.50	1.20	7.20
2008	-13.00	-0.30	-9.40	5.10	-2.90	-12.00	3.80	1.70	-4.20	-11.10	-2.30	4.80
2009	-1.60	-1.20	3.50	6.60	12.10	0.50	4.00	2.00	5.60	-2.50	4.80	3.60
2010	-2.60	0.10	4.10	2.30	-1.70	3.50	2.10	2.10	6.00	0.50	-2.40	1.70
2011	-7.10	-3.30	6.30	0.70	-1.40	1.30	-0.30	-6.60	-0.10	1.70	-4.20	-2.50
2012	6.10	3.60	0.20	0.20	-2.80	3.50	0.50	0.40	5.20	-0.20	3.00	1.60
2013	1.10	-3.80	-0.80	2.60	0.30	-1.90	-2.20	-2.10	3.50	3.20	1.30	3.40
2014	-0.10	3.00	4.30	0.40	2.40	6.70	2.60	4.10	5.50	1.70	4.00	1.10
2015	4.00	-0.30	4.60	-1.00	2.00	-0.30	4.20	-2.20	1.40	1.20	-2.60	-0.20
2016	-2.40	-3.30	4.90	1.50	-0.80	4.10	5.70	2.70	0.20	2.40	0.10	-3.00
2017	4.50	0.60	0.70	2.30	1.00	1.00	4.70	-0.20	-0.70	3.00	1.50	2.50
2018	0.00	-2.40	-2.60	4.30	0.80	0.30	1.30	3.60	-0.20	-0.70	-1.50	-0.70
2019	1.50	0.30	-0.30	0.30	0.30	1.40	0.20	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	1.10	0.00

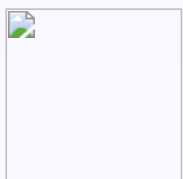
## Organisation Overview



### 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

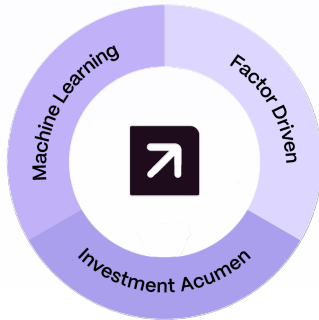


## Dr Miquel Alonso

Advisor, Machine Learning

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

## Data Driven Organisation



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