Mutual Funds - Conservative

Invest in stability and security with Wright Research's Conservative Mutual Fund portfolio.

Investment Objective

This is a multi asset mutual fund portfolio suited for the investor with the conservative risk profile.The allocations are dynamically adjusted semi annually.

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. Direct Mutual Funds; Debt Allocation 80% or more; No credit risk debt funds, Banking &PSU funds or sectoral equity funds

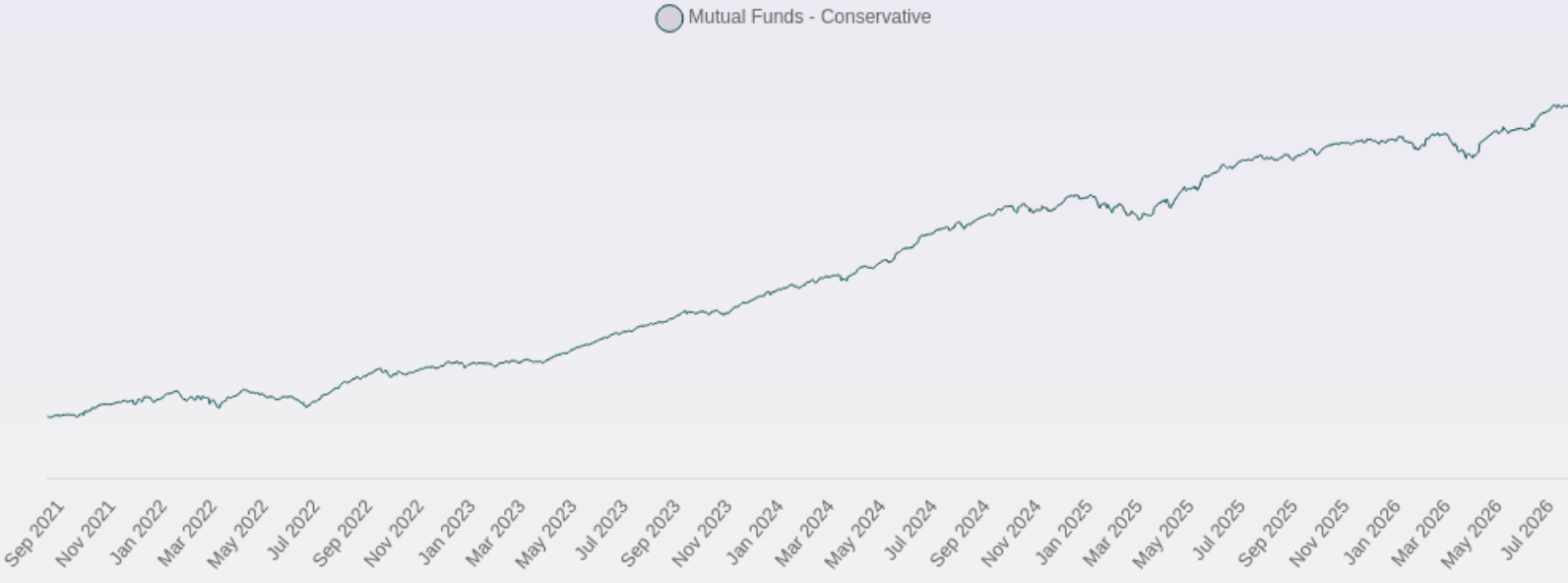
Minimum Investment
Rs. 10000

Rebalancing Frequency
Half-Yearly

	Inception	MTD	1M	3M	6M	1Y	2Y	3Y	YTD
Mf-Conservative	10.0	0.6	0.4	3.0	4.3	5.9	6.9	9.3	4.3
Bond	5.5	0.6	0.6	2.7	2.4	2.9	6.7	7.5	2.9

10 Years Expected Performance	Mf-Conservative	Bond
Annualized Returns	10.0	5.5
Annualized Risk	3.6	21.3
Sharpe Ratio	279.0	25.8
Max Drawdown	-6.4	-7.8
Corr	4.1	-

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	0.00	1.10	-0.70	1.20	0.20	1.20
2020	1.20	2.80	-0.90	3.00	1.80	1.10	2.90	-2.10	1.10	1.40	2.90	1.60
2021	0.40	1.10	1.20	1.60	0.20	1.20	0.60	0.40	0.70	1.10	0.50	0.70
2022	-0.20	-0.30	1.00	-0.20	-0.20	-0.80	2.60	1.60	0.10	0.60	0.80	0.00
2023	0.00	0.30	0.20	1.60	1.50	1.20	1.10	1.00	0.60	-0.20	1.50	1.80
2024	0.80	0.80	0.60	1.40	1.70	1.90	1.40	0.80	1.10	-0.40	0.80	0.70
2025	-1.20	-1.60	2.30	1.40	1.80	1.50	0.40	-0.20	0.70	1.10	0.50	0.10
2026	-0.60	1.20	-2.60	2.80	0.50	2.10	0.40	0.60	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

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Vinod Reddy Kotha

CTO

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

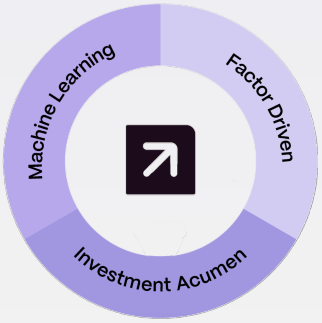


Dr Miquel Alonso

Advisor, Machine Learning

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

Data Driven Organisation



Our Accolades

Fintech Innovator
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Top 30 Startups to Watch
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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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