



# Mutual Funds - Moderately Conservative

Invest with balance and confidence with Wright Research's Moderately Conservative basket.

## Investment Objective

This is a multi asset mutual fund portfolio suited for the investor with the moderately 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. Debt 60% - 79.99%; No credit risk debt funds or sectoral equity funds

Minimum Investment  
**Rs. 10000**

Rebalancing Frequency  
**Half-Yearly**

	Inception	MTD	1M	3M	6M	1Y	2Y	3Y	YTD
<b>Mf-Moderately-Conservative</b>	11.0	3.5	-5.0	-5.2	-3.7	3.0	6.6	10.6	-1.9
<b>Bond</b>	5.3	0.3	-0.8	-0.2	0.7	3.8	6.9	7.4	0.1

10 Years Expected Performance	Mf-Moderately-Conservative	Bond
Annualized Returns	11.0	5.3
Annualized Risk	6.1	3.6
Sharpe Ratio	178.9	146.5
Max Drawdown	-11.7	-4.8
Corr	18.6	-

## Portfolio Performance

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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
2019	0.00	0.00	0.00	0.00	0.00	0.00	-0.30	1.30	-1.10	1.50	0.30	1.50
2020	1.40	2.20	-5.70	5.40	-0.20	1.40	3.80	-2.30	1.10	1.50	5.40	2.50
2021	0.60	3.20	1.50	1.60	0.30	2.50	1.00	0.30	0.80	1.60	0.10	1.20
2022	-0.90	-1.00	1.30	-0.60	-0.60	-1.50	4.20	2.10	-0.40	1.10	0.90	-0.50
2023	-0.60	-0.10	-0.20	2.50	2.20	1.80	1.60	1.10	0.70	-0.80	2.40	3.10
2024	1.00	1.10	0.80	2.10	2.20	3.20	2.00	1.00	1.60	-1.60	1.10	0.90
2025	-2.70	-3.30	3.60	1.80	2.60	2.30	-0.10	-0.40	0.60	1.60	0.40	-0.40
2026	-1.50	1.30	-5.00	3.50	0.00	0.00	0.00	0.00	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

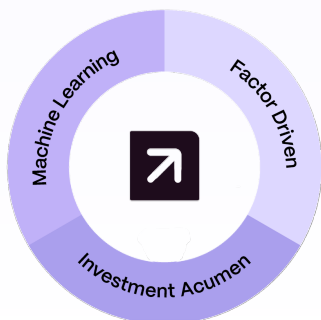


### Dr Miquel Alonso

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

**50,000+**  
Active Investors

**Nidhi SSS Awardee**  
Govt of India

**Top 30 Startups to Watch**  
Inc42

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 [info@wrightresearch.in](mailto:info@wrightresearch.in)

 +91 - 6360127635

 Wright Research,  
The Capital  
815A/B-Wing, opp.  
ICICI Bank,  
G Block, BKC Bandra  
Kurla  
Complex, Bandra  
East Mumbai,  
Maharashtra 400051

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