

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
Mf-Moderately-Conservative	12.1	0.4	1.6	1.8	6.7	8.1	14.2	12.4	6.3
Bond	5.7	0.5	0.8	0.4	1.6	8.2	9.4	8.8	7.5

10 Years Expected Performance	Mf-Moderately-Conservative	Bond
Annualized Returns	7.6	3.2
Annualized Risk	7.4	2.7
Sharpe Ratio	101.7	119.5
Max Drawdown	-38.4	-6.3
Corr	12.6	-

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	n-on-M	onth F	Perfori	mance	;							
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	-5.30	-1.00	4.80	5.00	1.90	3.00	-0.50	7.30	5.10	1.60	8.30
2008	-12.90	-0.40	-9.00	5.30	-2.50	-11.50	3.20	1.70	-3.50	-10.30	-2.10	4.80
2009	-1.10	-0.90	2.70	5.30	10.00	0.60	3.70	2.20	5.00	-2.10	4.60	3.70
2010	-2.50	-0.20	4.00	2.10	-1.40	3.10	1.80	2.40	5.80	0.50	-2.30	1.70
2011	-6.70	-2.70	6.00	0.70	-1.70	0.90	0.00	-5.70	-0.20	2.30	-4.40	-2.50
2012	7.10	3.20	0.50	0.30	-2.90	3.50	0.50	0.30	5.10	-0.30	2.80	1.80
2013	0.90	-3.60	-0.90	2.60	0.40	-1.60	-2.10	-2.00	3.90	0.70	1.60	1.30
2014	-0.70	2.10	4.90	1.20	4.90	4.30	0.30	2.90	2.70	3.30	3.90	3.10
2015	3.30	0.40	0.20	-1.40	1.40	-0.70	3.20	-1.70	1.30	0.90	-0.40	-0.20
2016	0.40	-1.00	3.40	1.30	-0.90	3.40	4.30	2.70	1.10	1.70	0.60	-2.50
2017	2.20	0.00	0.10	0.90	0.50	0.70	2.10	0.10	0.40	2.60	0.30	1.60
2018	0.50	-1.30	-0.40	2.60	1.00	0.10	0.20	2.40	0.50	1.00	-0.80	-0.40
2019	1.10	0.20	0.60	0.10	-0.20	1.50	1.20	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	0.00

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



Our Accolades

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