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

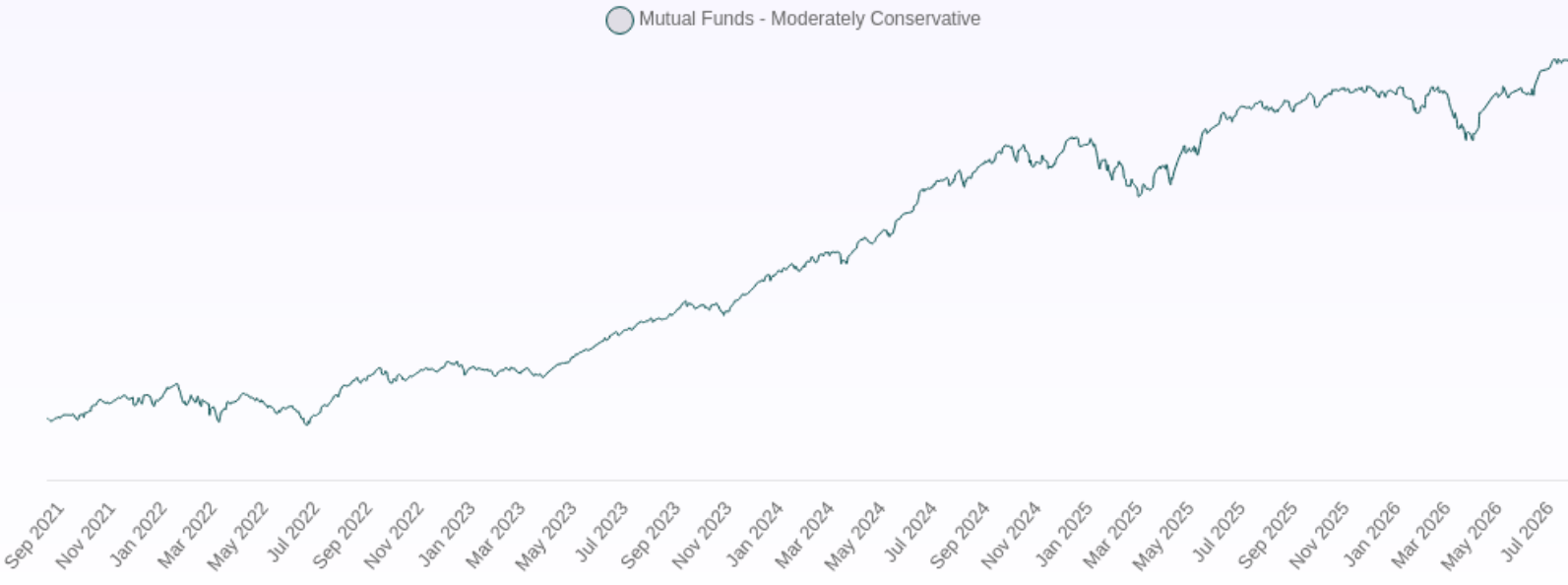
Minimum Investment
Rs. 10000

Rebalancing Frequency
Half-Yearly

	Inception	MTD	1M	3M	6M	1Y	2Y	3Y	YTD
Mf-Moderately-Conservative	11.3	0.8	0.8	4.0	4.9	5.1	6.2	10.8	4.1
Bond	5.5	0.6	0.6	2.7	2.4	2.9	6.7	7.5	2.9

10 Years Expected Performance	Mf-Moderately-Conservative	Bond
Annualized Returns	11.3	5.5
Annualized Risk	6.2	21.3
Sharpe Ratio	184.0	25.8
Max Drawdown	-11.7	-7.8
Corr	1.6	-

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-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	4.80	0.50	2.60	0.80	0.80	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

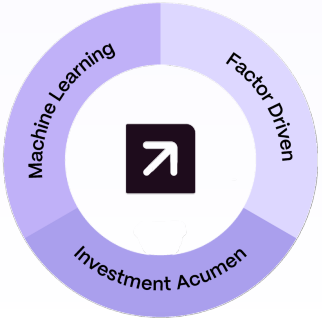
- 9+ years in Software Development
- Housing.com, Testbook.com, Buyceps.com
- B.Tech, CSE, IIT Bombay

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

2 Lakh+
Lifetime Investors

Nidhi SSS Awardee
Govt of India

Top 30 Startups to Watch
Inc42

Wright.

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- Calculation of such back-tested performance data is based on assumptions integral to the model which may or may not be testable and are therefore subject to losses.
- 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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