

## Investment Objective

Invest in the Atmanirbhar Bharat theme - stocks favored by PLI, China+1 and Make In India. This is a high risk equity strategy to invest in stocks with high degrees of innovation and gaining from the government investment in new infrastructure segments.

## Investment Mechanism

Wright New India is a data-driven quantitative smart beta strategy investing in the innovative sectors and industries favoured by the Atmanirbhar India theme using position sizing techniques and market regime modelling using machine learning models.

Minimum Investment

**Rs. 74078**

Rebalancing Frequency

**Monthly**

	Inception	MTD	1M	3M	6M	1Y	2Y	3Y	YTD
<b>Newindia</b>	25.1	2.2	-15.2	-14.3	-9.1	-8.3	4.9	31.5	-12.4
<b>Smallcap</b>	12.1	4.3	-10.2	-14.2	-13.4	-5.5	-1.6	19.1	-10.5

## 10 Years Expected Performance

	Newindia	Smallcap
Annualized Returns	29.6	13.4
Annualized Risk	19.6	37.9
Sharpe Ratio	150.9	35.2
Max Drawdown	-30.5	-50.8
Corr	43.3	-

## Portfolio Performance

○ Wright New India Manufacturing Theme



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
2014	3.80	3.40	13.90	0.70	17.80	17.10	9.10	9.40	10.70	2.20	5.70	-0.90
2015	3.40	1.00	-3.90	-2.20	3.10	0.90	8.20	-7.60	0.90	4.60	-1.40	2.80
2016	-6.00	-6.60	7.30	2.20	1.50	8.70	5.00	3.80	-1.90	5.50	-4.20	-1.20
2017	1.70	4.70	9.10	4.70	0.20	1.40	4.20	-8.20	-1.80	0.40	-0.30	7.40
2018	-5.40	-3.10	-4.90	0.90	-4.20	-3.20	3.60	4.60	-10.20	0.10	1.70	1.80
2019	-3.50	-3.80	4.50	-4.90	0.60	-1.60	-5.40	3.00	4.80	7.20	0.20	2.80
2020	3.60	-3.10	-20.90	30.30	6.50	19.80	-3.00	6.90	-0.10	1.70	11.20	10.50
2021	-1.00	9.80	1.00	4.50	5.20	12.30	6.80	-1.40	2.90	3.90	-2.30	3.10
2022	15.30	-3.80	4.80	4.10	-7.40	-5.30	9.80	8.50	-2.10	4.90	1.80	0.50
2023	-1.90	-5.40	1.60	7.30	5.50	8.80	10.50	10.50	5.40	-1.40	15.60	9.50
2024	10.30	-1.60	-3.80	14.30	12.80	8.00	2.80	-3.10	3.50	-4.80	0.30	4.70
2025	-14.60	-10.20	8.90	-2.20	2.10	2.50	0.10	-4.80	3.40	6.70	0.00	-0.60
2026	-2.10	3.20	-15.20	2.20	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**  
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Inc42

## Disclosure

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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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