

Wright Smallcaps Tracker Small Stocks, Big Potential: Unleash the Wright Smallcaps Revolution.

Investment Objective

This is a high risk equity strategy to participate in high quality small cap stocks. This strategy is specifically build to take advantage of the smallcap rally.

Investment Mechanism

Wright Smallcaps is a data-driven quantitative multi factor tactical strategy based on multiple equity factors based on smart beta & technical combined using position sizing techniques and market regime modelling using machine learning models. This portfolio is expected to generate consistent high returns over time.

Minimum Investment

Rs. 68873

Rebalancing Frequency

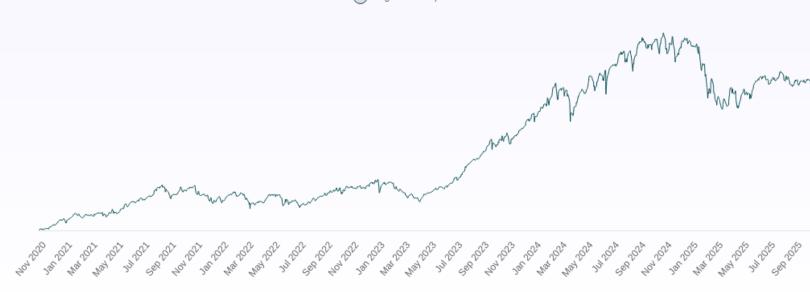
Monthly

	Inception	MTD	1M	3M	6M	1Y	2Y	3Y	YTD
Smallcaps	35.9	3.1	-0.7	-4.2	3.4	-18.7	16.8	27.6	-14.0
Smallcap	31.6	3.2	1.9	-7.9	9.1	-8.4	17.4	23.0	-3.4

10 Years Expected Performance	Smallcaps	Smallcap		
Annualized Returns	31.0	10.9		
Annualized Risk	21.5	34.4		
Sharpe Ratio	144.7	31.6		
Max Drawdown	-37.5	-50.8		
Corr	39.3	-		

Portfolio Performance

Wright Smallcaps Tracker



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	lonth F	Perfor	mance	e							
month	1	2	3	4	5	6	7	8	9	10	11	12
2009	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2010	7.00	3.10	3.20	2.10	0.20	8.00	-3.00	12.20	3.80	11.30	-5.40	2.90
2011	-2.40	1.60	2.00	4.60	2.40	4.60	3.70	-4.50	-8.50	0.70	-9.50	-9.70
2012	3.20	5.70	3.40	-0.60	1.80	10.50	-3.70	0.90	5.30	2.00	1.00	2.00
2013	0.10	-2.30	-7.90	-2.30	6.30	-1.60	-6.50	0.30	4.40	9.90	2.90	7.70
2014	0.70	15.50	18.00	10.90	37.60	10.80	2.00	-1.40	-0.10	7.50	5.00	6.80
2015	2.00	1.70	-2.40	-2.00	8.90	0.10	4.70	-2.50	0.20	0.60	5.90	5.10
2016	3.20	-0.60	4.30	1.10	2.00	7.90	-3.50	8.90	1.80	3.60	-9.80	-1.40
2017	2.60	5.80	11.10	5.70	5.60	4.90	4.30	6.00	1.70	3.80	8.10	8.90
2018	-4.60	-7.40	5.00	-1.40	-9.20	-2.30	9.30	0.40	-17.10	1.20	-0.30	8.90
2019	-2.10	1.40	-8.10	-5.10	4.70	0.70	-11.40	-6.00	1.40	9.70	1.40	7.10
2020	11.30	-0.60	-2.50	6.60	9.20	7.30	20.80	4.50	0.40	3.50	8.20	10.30
2021	0.30	4.20	1.70	6.60	9.30	6.00	11.40	-7.40	4.90	-5.60	-9.10	7.70
2022	2.40	-9.30	2.70	6.40	-7.90	-2.00	5.70	10.40	1.10	1.20	3.90	0.20
2023	-1.90	-11.30	-1.00	9.40	3.90	9.40	16.50	9.80	5.30	1.40	10.10	6.60
2024	11.30	-0.50	-5.20	14.90	0.00	4.80	7.00	5.00	-0.50	-1.10	0.80	-2.40
2025	-17.60	-9.20	7.90	-1.10	9.40	-0.20	0.30	-3.80	-0.70	3.10	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

- 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



Al Game Changers **NASSCOM**

Nidhi SSS Awardee Govt of India

Top 30 Startups to Watch Inc42

Active Investors



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Disclosure

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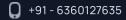
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