Wright ETFs Asset Allocation

Navigate market volatility with confidence - invest in Wright Tactical ETFs

Investment Objective

This is a medium risk strategy which aims to outperform in all stages of the market cycle, the volatile and the trending. This is achieved by dynamic allocation to various ETFs based on the changing market regime.

Investment Mechanism

The strategy seeks to achieve its investment objective through a diversified approach to take advantage of structural inefficiencies within the Indian equity market. The strategy is managed systematically and uses a combination of ETFs along with machine learning driven risk modelling. We do asset allocation to 4 asset classes - equities, bonds, gold and liquid instruments

Minimum Investment
Rs. 3296

Rebalancing Frequency
Monthly

	Inception	MTD	1M	3M	6M	1Y	2Y	3Y	YTD
Tactical-Etfs	12.3	0.4	1.1	3.8	4.6	7.0	1.9	12.2	1.9
Nifty	10.4	0.1	2.2	1.6	-3.7	-1.6	-1.1	7.3	-6.6

10 Years Expected Performance	**Tactical-Etfs**	**Nifty**
Annualized Returns	11.0	9.3
Annualized Risk	12.7	13.6
Sharpe Ratio	86.8	68.6
Max Drawdown	-20.1	-17.2
Corr	77.2	-

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.

Wright.

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Month-on-Month Performance

month	1	2	3	4	5	6	7	8	9	10	11	12
2021	0.00	-3.50	-1.50	0.50	2.50	1.80	1.10	4.20	3.40	1.40	-3.40	0.40
2022	-5.00	0.10	1.30	-0.20	-4.60	-2.90	3.50	4.70	-2.30	6.20	6.60	0.50
2023	-5.00	-1.40	2.50	2.70	1.10	3.70	5.40	-0.50	2.90	-2.70	3.70	6.30
2024	4.10	2.60	4.70	3.70	1.00	1.70	3.70	0.10	2.20	-7.10	0.30	-1.10
2025	-5.00	-8.20	8.70	4.00	3.70	3.90	-3.00	-2.50	1.80	5.20	1.30	-0.40
2026	-3.00	2.60	-12.20	11.90	1.20	1.50	1.10	0.40	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

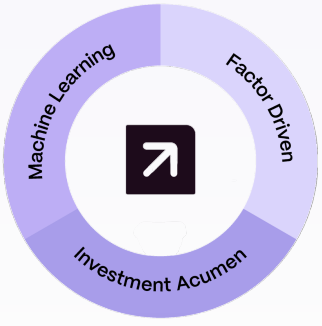
- 9+ years in Software Development
- Housing.com, Testbook.com, Buyceps.com
- B.Tech, CSE, IIT Bombay

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

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SEBI Registered Research Analyst No: **INH000017295**
(Validity: Jul 03, 2024 - Perpetual)
CIN: **U67100UP2019PTC123244**

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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