

Investment Objective

Invest in Disruptive Innovation : Electric Mobility, Biotech, Ecommerce, Digital Revolution, Fintech This is a high risk equity strategy to invest in stocks with high degrees of innovation.

Investment Mechanism

Wright Innovation is a data-driven quantitative innovation smart beta strategy investing in Electric Mobility, Biotech, Ecommerce, Digital Revolution, Fintech 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. 66889

Rebalancing Frequency

Monthly

| | Inception | MTD | 1M | 3M | 6M | 1Y | 2Y | 3Y | YTD |
|-------------------|-----------|-----|------|------|------|------|------|------|------|
| Innovation | 34.0 | 0.3 | -4.1 | -1.7 | 5.7 | 37.2 | 35.8 | 21.1 | 13.1 |
| Smallcap | 26.0 | 0.3 | 0.3 | -3.4 | 11.7 | 31.6 | 36.7 | 20.5 | 23.6 |

10 Years Expected Performance

| | Innovation | Smallcap |
|--------------------|-------------------|-----------------|
| Annualized Returns | 30.4 | 16.8 |
| Annualized Risk | 20.3 | 39.4 |
| Sharpe Ratio | 149.7 | 42.6 |
| Max Drawdown | -37.8 | -50.8 |
| Corr | 39.4 | - |

Portfolio Performance

Wright Innovation



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 | 6.80 | 2.20 | 8.60 | -0.30 | 14.60 | 10.80 | 2.90 | 6.00 | 7.30 | 2.00 | 1.60 | -1.60 |
| 2015 | 1.50 | 4.70 | -4.70 | -7.10 | 0.80 | 0.40 | 11.20 | -6.70 | 1.00 | 4.40 | 1.80 | 1.10 |
| 2016 | -6.10 | -1.90 | 5.90 | 1.70 | 3.60 | 5.50 | 4.10 | 2.80 | -0.10 | 4.70 | -1.60 | 0.50 |
| 2017 | 4.10 | 4.40 | 5.60 | 2.50 | 0.50 | 3.80 | 6.60 | 5.10 | 2.70 | 0.10 | 8.70 | 6.10 |
| 2018 | -0.60 | -6.80 | -0.40 | -2.70 | -4.50 | -9.30 | 4.30 | 11.10 | -4.40 | -0.40 | -2.90 | 10.40 |
| 2019 | -2.30 | -2.50 | -5.50 | -5.00 | -0.70 | -2.30 | -11.00 | -7.40 | 4.50 | 9.80 | 2.10 | 8.20 |
| 2020 | 8.40 | -5.00 | -12.90 | 7.90 | 7.40 | 3.50 | 17.80 | 8.40 | 6.20 | 4.30 | 5.00 | 0.80 |
| 2021 | 4.90 | 19.40 | 5.10 | 11.90 | 11.50 | 8.90 | 7.30 | 1.80 | 4.50 | 2.90 | 2.90 | 3.20 |
| 2022 | -2.40 | -11.50 | 7.30 | -3.20 | -7.10 | -4.40 | 3.20 | 7.50 | -2.50 | 5.20 | 1.10 | -4.20 |
| 2023 | -1.50 | -5.30 | -1.20 | 5.80 | 7.00 | 10.40 | 6.80 | 8.90 | 1.70 | 1.70 | 14.80 | 6.00 |
| 2024 | 6.80 | -3.10 | -3.90 | 7.30 | -1.40 | 6.10 | 2.70 | 0.90 | 1.60 | -4.10 | 0.30 | 0.00 |

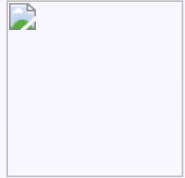
Organisation Overview



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

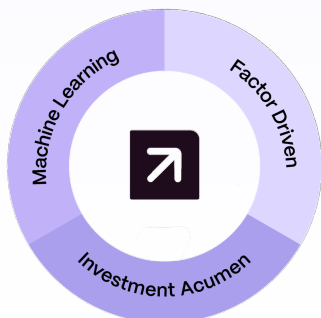


Dr Miquel Alonso

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
Watch
Inc42

Disclosure


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(Validity: Jan 12, 2021 - Perpetual)
SEBI Registered Research Analyst No: **INH000017295**
(Validity: Jul 03, 2024 - Perpetual)
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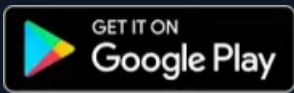
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