

## Investment Objecti

This is a multi asset mutual fund port annually.

## Investment Mech

This portfolio is constructed using class MFs in various categories. Various MFs is done to maximize returns for the given level of risk, exposure to various sectors & the Direct Mutual Funds; Debt Allocation; No credit risk debt funds, B funds or sectoral equity funds

Minimum Investment  
Rs. 10000

Rebalancing Frequency  
Half-Yearly

## Portfolio Performan



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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 Returns

month	1	2
2000	0.00	0.00
2001	0.00	0.00
2002	0.00	0.00
2003	0.00	0.00
2004	0.00	0.00
2005	0.00	0.00
2006	0.00	0.00
2007	-0.10	-3.90
2008	-10.50	-1.00
2009	-0.90	-1.10
2010	-1.70	-0.20
2011	-4.80	-1.60
2012	5.70	2.80
2013	0.50	-3.00
2014	-0.50	1.40
2015	2.60	0.40
2016	0.70	-0.40
2017	1.70	-0.50
2018	0.40	-0.40
2019	0.20	0.10
2020	1.20	2.80
2021	0.40	1.10
2022	-0.20	-0.30
2023	0.00	0.30
2024	0.80	0.80

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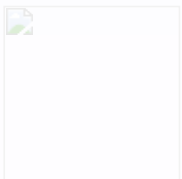
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### Organisation Overview



**Sonam Srivastava**  
Founder, Portfolio Manager

- 10+ years in Investment Management
- HSBC, JP Morgan Chase
- IIT Kanpur



**Vinod Reddy**  
CTO

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



50
40
30
20
10
0
-10
-20
-30
-40
-50
-60
-70
-80
-90
-100



Dr Miquel Alonso

Advisor, Machine Learning

- Founder Artificial Intelligence in Finance Institute
- Faculty - CQF, Columbia, NYU
- Executive Director - UBS

## Data Driven Organisation



## Our Accolades



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[info@wrightresearch.in](mailto:info@wrightresearch.in)

+91 - 6360127635

Wright Research, 1233-A EFC Limited, Sector 17, Gurgaon, Haryana

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