Mutual Funds - Conservative

Invest in stability and security with Wright Research's Conservative Mutual Fund portfolio.

Investment Objective

This is a multi asset mutual fund portfolio suited for the investor with the conservative risk profile.The allocations are dynamically adjusted semi annually.

Investment Mechanism

This portfolio is constructed using the best in class MFs in various categories. The allocation to various MFs is done to maximize the expected returns for the given level of risk. The maximum exposure to various sectors & themes is capped. Direct Mutual Funds; Debt Allocation 80% or more; No credit risk debt funds, Banking &PSU funds or sectoral equity funds

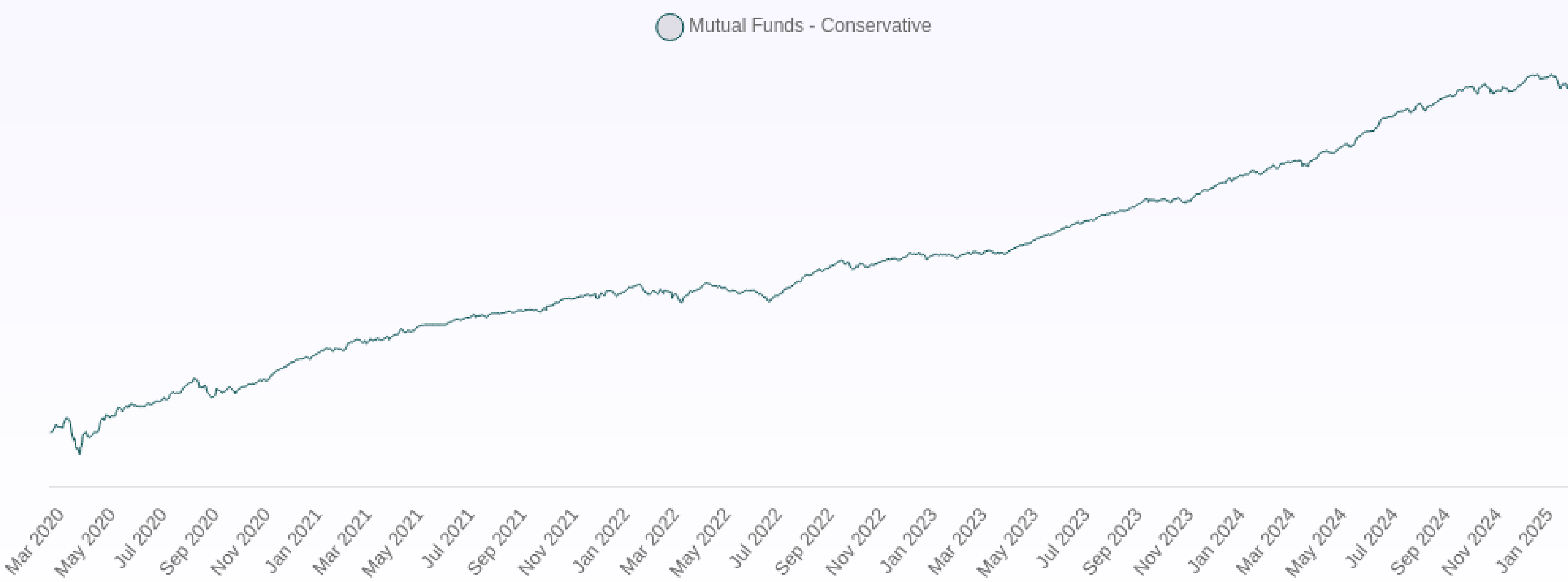
Minimum Investment
Rs. 10000

Rebalancing Frequency
Half-Yearly

	Inception	MTD	1M	3M	6M	1Y	2Y	3Y	YTD
Mf-Conservative	10.2	-1.0	-1.2	0.4	1.9	10.1	11.1	9.1	-2.2
Bond	5.4	0.0	1.3	2.5	4.8	10.1	9.2	6.6	1.4

10 Years Expected Performance	**Mf-Conservative**	**Bond**
Annualized Returns	7.1	3.1
Annualized Risk	5.7	2.7
Sharpe Ratio	122.7	114.4
Max Drawdown	-32.1	-6.3
Corr	15.5	-

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.

Mutual Funds - Conservative

Invest in stability and security with Wright Research's Conservative Mutual Fund portfolio.

Month-on-Month Performance

month	1	2	3	4	5	6	7	8	9	10	11	12
2000	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2001	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2002	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2003	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2004	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2005	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2006	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2007	-0.10	-3.90	0.00	3.90	4.70	1.80	2.70	-0.10	5.20	5.10	1.70	7.40
2008	-10.50	-1.00	-7.10	4.30	-1.80	-9.40	2.20	1.20	-2.40	-7.40	-1.30	4.10
2009	-0.90	-1.10	2.70	5.30	10.00	0.60	3.70	1.40	4.10	-1.30	3.70	3.50
2010	-1.70	-0.20	2.90	1.90	-1.00	2.40	1.50	2.00	4.70	0.30	-0.70	1.40
2011	-4.80	-1.60	4.40	0.50	-1.30	0.90	-0.10	-4.30	0.40	1.40	-3.10	-1.50
2012	5.70	2.80	0.30	0.20	-1.70	2.70	0.70	0.40	3.80	0.00	2.60	1.80
2013	0.50	-3.00	-0.60	2.70	0.90	-1.30	-1.70	-1.90	3.30	0.70	1.20	1.20
2014	-0.50	1.40	3.10	1.10	3.70	2.80	0.70	1.90	2.40	3.20	3.00	2.60
2015	2.60	0.40	0.30	-0.90	0.80	-1.00	2.30	-0.40	1.40	0.60	-0.60	-0.10
2016	0.70	-0.40	2.40	1.50	-0.40	2.30	3.70	2.00	1.20	1.10	2.50	-2.30
2017	1.70	-0.50	0.50	0.60	0.60	0.70	1.50	0.40	0.40	1.40	0.30	0.80
2018	0.40	-0.40	0.70	1.40	1.30	0.70	0.70	2.00	0.70	-0.50	-0.60	0.70
2019	0.20	0.10	1.90	0.00	0.10	1.00	1.80	1.10	-0.70	1.20	0.20	1.20
2020	1.20	2.80	-0.90	3.00	1.80	1.10	2.90	-2.10	1.10	1.40	2.90	1.60
2021	0.40	1.10	1.20	1.60	0.20	1.20	0.60	0.40	0.70	1.10	0.50	0.70
2022	-0.20	-0.30	1.00	-0.20	-0.20	-0.80	2.60	1.60	0.10	0.60	0.80	0.00
2023	0.00	0.30	0.20	1.60	1.50	1.20	1.10	1.00	0.60	-0.20	1.50	1.80
2024	0.80	0.80	0.60	1.40	1.70	1.90	1.40	0.80	1.10	-0.40	0.80	0.70
2025	-1.20	-1.00	0.00	0.00	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

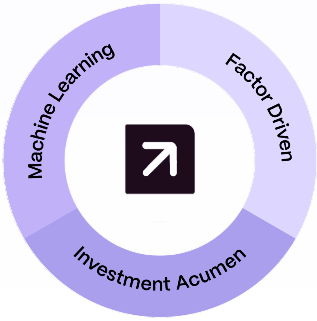
- 9+ years in Software Development
- Housing.com, Testbook.com, Buyceps.com

- 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 Watch
Inc42

Wright.

Mutual Funds - Conservative

Invest in stability and security with Wright Research's Conservative Mutual Fund portfolio.

Disclosure

Wryght Research & Capital Private Limited (hereinafter referred to as “the Company”) is a SEBI Registered Investment Advisor having registration number - INA100015717 under SEBI (Investment Advisor) Regulations, 2013 and having Principal Officer Siddharth Singh Bhaisora. The registered address of the company is 102, Shagun Vatika, Prag Narayan Road, Lucknow - 226001. The Company is involved in investment advisory activities in Indian capital markets.

- The Company has neither been suspended nor debarred from doing business by any Stock Exchange / SEBI or any other authorities; nor has its certificate of registration been cancelled by SEBI at any point of time.
- The Company is not engaged in merchant banking, investment banking or any brokerage services.
- Unless otherwise stated, the percentage returns displayed on the website or any other marketing materials are Absolute Returns.
- Reports or research material prepared by the company are not to be construed as an offer to buy /sell or thesolicitation of an offer to buy / sell any security in any jurisdiction where such offer or solicitation would be illegal. Reports or research material prepared by the company do not constitute a personal recommendation or take into account the particular investment objectives, financial situations, risk profile and needs of individual clients.
- The content and data available in the material prepared by the company and on the website of the company, including but not limited to index value, return numbers and rationale are for information and illustration purposes only. Charts and performance numbers might include backtested/simulated results calculated via a standard methodology and do not include the impact of transaction fee and other related costs. Data used for calculation of historical returns and other information is provided by exchange approved third party data vendors and has neither been audited nor validated by the Company. “Back-testing” is the application of a quantitative model to historical market data to generate hypothetical performance during a prior period. Use of back-tested data has inherent limitations including the following:
- The results do not reflect the results of actual trading or the effect of material economic and market conditions on the decision-making process, but were achieved by means of retrospective application, which may have been designed with the benefit of hindsight.
- Calculation of such back-tested performance data is based on assumptions integral to the model which may or may not be testable and are therefore subject to losses.
- Actual performance may differ significantly from back-tested performance. Back-tested results are not adjusted to reflect the reinvestment of dividends and other income and, except where otherwise indicated, do not include the effect of back-tested transaction costs.

- Back-tested returns do not represent actual returns and should not be interpreted as an indication of such.
- Information present in the material prepared by the company and on the website of the company shall not be considered as a recommendation or solicitation of an investment or investment strategy. Investors are responsible for their investment decisions and are responsible to validate all the information used to make the investment decision. Investor should understand that his/her investment decision is based on personal investment needs and risk tolerance, and information present in the material prepared by the company and on the website of the company is one among many other things that should be considered while making an investment decision. Past performance does not guarantee future returns and performances of the portfolios created by the company are subject to market risk. Investments in securities market are subject to market risks and investors should read all the related documents carefully before investing. Derivatives are sophisticated investment products. The investor is requested to take into consideration all the risk factors before actually trading in derivative contracts.
- While we endeavour to update the information / material on various products and reports created by us, on a reasonable basis, there may be regulatory, compliance or other reasons that prevent us from doing so.
- We and our associates, officers, directors, and employees, Investment Advisor (including relatives) worldwide may: (a) from time to time, have long or short positions in, and buy or sell the securities thereof, of company (ies) forming part of the products or reports created by the company or (b) may have other potential/material conflict of interest with respect to any company(ies) in various products or reports created by the company. Any such positions of conflict of interest will be appropriately disclosed and dealt with in accordance with applicable law.
- The Company does not provide any promise or assurance of favourable view for a particular industry or sector or business group in any manner. The investor is requested to take into consideration all the risk factors including their financial condition, suitability to risk return profile and take professional advice before investing.
- The analysts for various products or reports created by the company certify that all of the information /material therein accurately reflect his or her personal views about the subject company or companies and its or their securities, and no part of his or her compensation was, is or will be, directly or indirectly related to company(ies) in various products or reports created by the company. No part of this material may be duplicated in any form and/or redistributed without the prior written consent of the Company.

Wright.

Company Name: Wright Research & Capital Pvt Ltd I SEBI
Registered Portfolio Manager Reg No: **INP000007979**
(Validity: Apr 03, 2023 - Perpetual)
SEBI Registered Investment Advisor Reg No: **INA100015717**
(Validity: Jan 12, 2021 - Perpetual)
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

Supports

[Investment Charter]

[Smart ODR]

[Complaints]

[Disclosure]

[Accredited Investors]

[FAQ]

Company

[Our Team]

[Philosophy]

[Policies]

[Career]

[Sitemaps]

The information provided by Wright Research through its website is for informational and educational purposes only and is not a solicitation to buy any of our products.