



# Mutual Funds - Moderately Aggressive

Embrace risk and aim for potential growth with Wright's Moderately Aggressive Basket.

## Investment Objective

This is a multi asset mutual fund portfolio suited for the investor with the moderately aggressive 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. Debt 20% - 39.99%; No credit risk debt funds

Minimum Investment

**Rs. 10000**

Rebalancing Frequency

**Half-Yearly**

	Inception	MTD	1M	3M	6M	1Y	2Y	3Y	YTD
<b>Mf-Moderately-Aggressive</b>	19.9	3.8	-7.2	-10.3	-9.3	5.8	20.7	15.2	-7.6
<b>Nifty</b>	13.9	6.3	-5.9	-8.3	-12.3	0.6	13.1	9.6	-0.5

### 10 Years Expected Performance

Annualized Returns

### Mf-Moderately-Aggressive

9.6

### Nifty

11.2

Annualized Risk

10.0

21.9

Sharpe Ratio

96.2

51.5

Max Drawdown

-42.5

-59.9

Corr

64.7

-

## Portfolio Performance

Mutual Funds - Moderately Aggressive



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
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	-0.70	-5.30	-0.50	4.60	4.40	1.90	3.80	-1.40	7.80	7.50	0.80	6.80
2008	-13.00	-0.30	-10.00	5.40	-3.30	-12.80	4.00	1.90	-4.50	-12.90	-2.70	5.30
2009	-2.10	-1.10	3.50	6.60	12.10	0.50	4.00	2.10	6.30	-3.10	5.30	3.70
2010	-2.90	0.00	4.40	2.30	-1.80	3.60	2.00	2.00	6.40	0.60	-2.80	1.70
2011	-7.60	-3.60	6.50	0.70	-1.60	1.30	-0.50	-7.10	-0.20	2.00	-4.40	-2.60
2012	6.40	3.60	0.00	0.10	-3.00	3.90	0.40	0.40	6.20	-0.40	3.30	1.90
2013	0.60	-4.80	-1.30	3.40	0.40	-2.60	-3.30	-2.70	4.50	4.20	1.50	4.10
2014	0.20	3.80	4.40	1.20	1.40	9.20	3.80	5.30	6.00	1.50	4.40	1.40
2015	4.50	-0.50	4.40	-1.40	2.40	-0.10	4.60	-4.10	1.00	1.40	-3.00	0.10
2016	-4.00	-5.00	6.60	1.60	-0.60	4.30	6.10	3.20	-0.20	3.10	-1.10	-2.80
2017	5.10	0.90	0.40	2.80	1.00	0.80	5.60	-0.20	-0.60	4.40	1.40	3.30
2018	0.00	-3.20	-3.40	5.30	0.70	-0.10	0.90	3.90	-0.30	0.50	-2.50	-1.10
2019	1.50	0.40	-0.50	0.50	1.10	1.10	-1.80	1.30	-1.10	2.00	0.80	1.50
2020	1.90	1.30	-9.50	13.40	-0.20	1.60	7.40	-1.40	3.40	2.00	6.10	6.80
2021	-0.80	2.40	3.80	4.00	1.20	6.00	3.10	0.40	1.90	1.60	-0.60	3.50
2022	-1.50	-2.40	4.40	-2.80	-1.60	-2.50	4.80	1.10	-0.30	2.90	2.40	-2.50
2023	0.20	-1.00	-0.90	2.80	4.20	4.60	4.10	2.50	1.40	-1.80	5.50	5.40
2024	3.30	1.70	-1.60	1.20	1.20	4.60	6.90	3.40	1.00	-1.70	1.80	0.80
2025	-4.10	-7.20	3.80	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

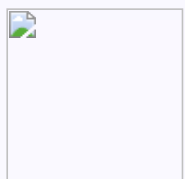
## Organisation Overview



### 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

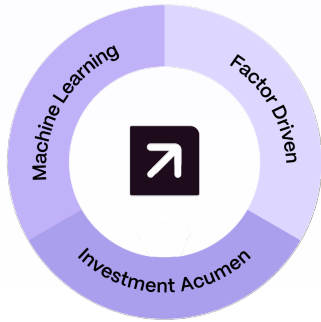


### Dr Miquel Alonso

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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AI Game Changers  
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Active Investors

**Nidhi SSS Awardee**  
Govt of India

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Inc42



**Mutual Funds - Moderately Aggressive**  
Embrace risk and aim for potential growth with Wright's Moderately Aggressive Basket.

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(Validity: Jan 12, 2021 - Perpetual)


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