

Mutual Funds - Moderately Conservative

Invest with balance and confidence with Wright Research's Moderately Conservative basket.

Investment Objective

This is a multi asset mutual fund portfolio suited for the investor with the moderately 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. Debt 60% - 79.99%; No credit risk debt funds or sectoral equity funds

Minimum Investment
Rs. 10000

Rebalancing Frequency
Half-Yearly

	Inception	MTD	1M	3M	6M	1Y	2Y	3Y	YTD
Mf-Moderately-Conservative	11.9	3.6	-3.3	-5.0	-4.0	7.4	12.5	10.1	-2.5
Bond	5.6	1.3	0.3	1.9	4.1	9.1	9.2	7.3	3.0

10 Years Expected Performance	Mf-Moderately-Conservative	Bond
Annualized Returns	7.4	3.1
Annualized Risk	7.5	2.7
Sharpe Ratio	99.1	116.5
Max Drawdown	-38.4	-6.3
Corr	12.5	-

Portfolio Performance

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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 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	-0.50	-5.30	-1.00	4.80	5.00	1.90	3.00	-0.50	7.30	5.10	1.60	8.30
2008	-12.90	-0.40	-9.00	5.30	-2.50	-11.50	3.20	1.70	-3.50	-10.30	-2.10	4.80
2009	-1.10	-0.90	2.70	5.30	10.00	0.60	3.70	2.20	5.00	-2.10	4.60	3.70
2010	-2.50	-0.20	4.00	2.10	-1.40	3.10	1.80	2.40	5.80	0.50	-2.30	1.70
2011	-6.70	-2.70	6.00	0.70	-1.70	0.90	0.00	-5.70	-0.20	2.30	-4.40	-2.50
2012	7.10	3.20	0.50	0.30	-2.90	3.50	0.50	0.30	5.10	-0.30	2.80	1.80
2013	0.90	-3.60	-0.90	2.60	0.40	-1.60	-2.10	-2.00	3.90	0.70	1.60	1.30
2014	-0.70	2.10	4.90	1.20	4.90	4.30	0.30	2.90	2.70	3.30	3.90	3.10
2015	3.30	0.40	0.20	-1.40	1.40	-0.70	3.20	-1.70	1.30	0.90	-0.40	-0.20
2016	0.40	-1.00	3.40	1.30	-0.90	3.40	4.30	2.70	1.10	1.70	0.60	-2.50
2017	2.20	0.00	0.10	0.90	0.50	0.70	2.10	0.10	0.40	2.60	0.30	1.60
2018	0.50	-1.30	-0.40	2.60	1.00	0.10	0.20	2.40	0.50	1.00	-0.80	-0.40
2019	1.10	0.20	0.60	0.10	-0.20	1.50	1.20	1.30	-1.10	1.50	0.30	1.50
2020	1.40	2.20	-5.70	5.40	-0.20	1.40	3.80	-2.30	1.10	1.50	5.40	2.50
2021	0.60	3.20	1.50	1.60	0.30	2.50	1.00	0.30	0.80	1.60	0.10	1.20
2022	-0.90	-1.00	1.30	-0.60	-0.60	-1.50	4.20	2.10	-0.40	1.10	0.90	-0.50
2023	-0.60	-0.10	-0.20	2.50	2.20	1.80	1.60	1.10	0.70	-0.80	2.40	3.10
2024	1.00	1.10	0.80	2.10	2.20	3.20	2.00	1.00	1.60	-1.60	1.10	0.90
2025	-2.70	-3.30	3.60	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

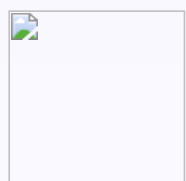
Organisation Overview



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

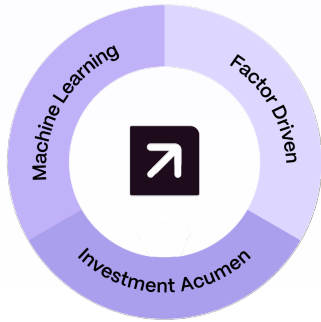


Dr Miquel Alonso

Advisor, Machine Learning

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

Data Driven Organisation



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(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)

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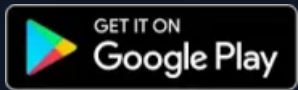
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