

Qode

July 2025 Edition

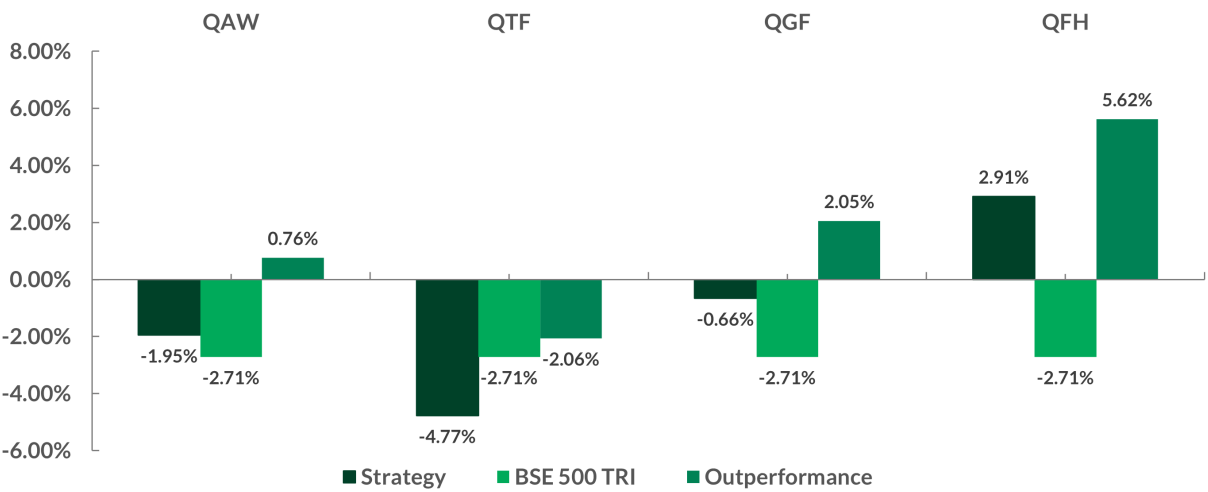
Hi <<First Name>>,

In this newsletter, we bring you detailed updates on the performance of all our strategies, along with comparison to their benchmark, ensuring you stay informed about how we're working to grow your wealth.

July 2025 Performance (%)

All the below returns are as of July 31, 2025

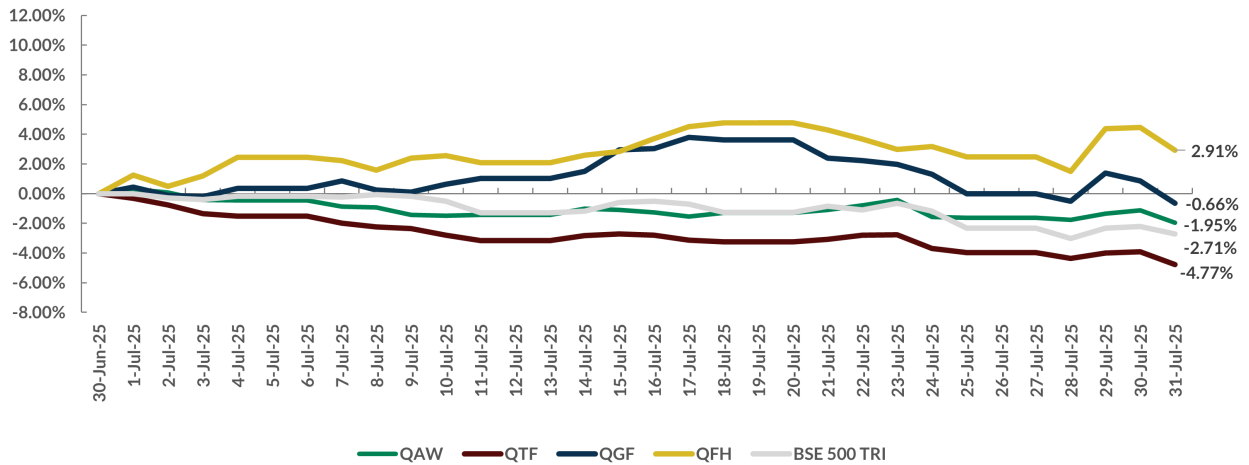
Strategy	July 2025
Qode All Weather	-1.95%
Qode Tactical Fund	-4.77%
Qode Growth Fund	-0.66%
Qode Future Horizons	2.91%
BSE 500 TRI	-2.71%



Note: Your returns might differ from the above numbers based on the timing of your investments. The above returns are on the consolidated pool of capital. All the returns are as of July 31, 2025 and are post fees.

July Equity Curve

All the below returns are as of July 31, 2025

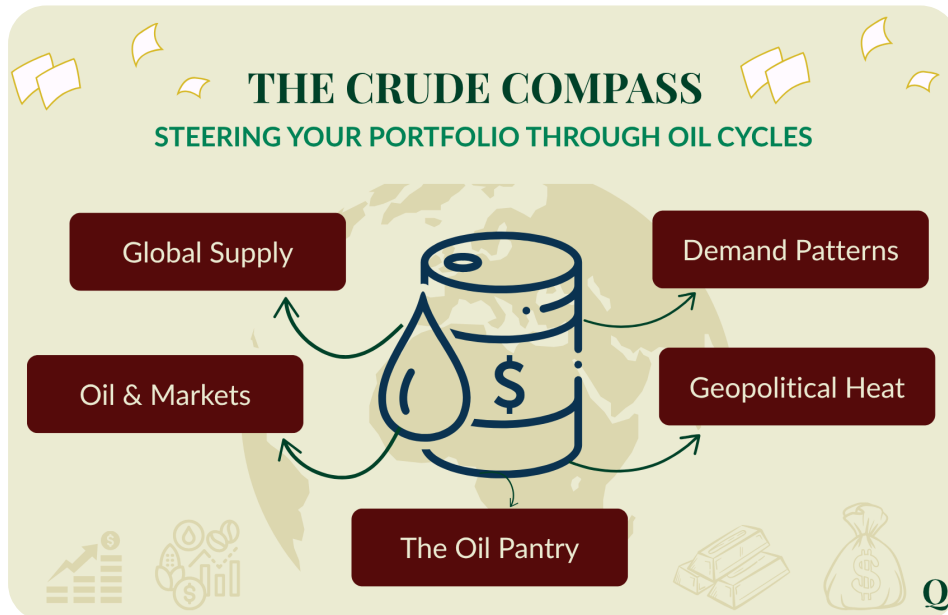


To know more about our strategies

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The Breakdown

Long-form explorations of markets, themes & strategies

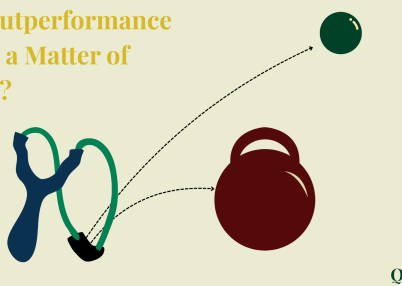


For decades, crude oil has been the heartbeat of the global economy. It fuels our industries, shapes inflation cycles, and drives geopolitical power plays. Yet for long-term investors, oil is more than just a commodity — it's a signal, a hedge, and sometimes, a storm. Knowing why oil prices change helps decide when to hedge inflation, when to own energy stocks or shift into safer assets... [Click here to read the full article](#)

QuickTake

Sharp insights. Fast reads. Big signals in small doses.

Is Outperformance
Still a Matter of
Size?



Does the size premium still work or is it just a cyclical mirage?

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View

HOLD COURSE.
STORMS PASS.



Do Short-Term Shocks Impact Growth?

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View



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