

## INVESTOR PROFILER

In Our Constant Endeavor To Serve You Better, Please Furnish The Questionnaire With Details So That We can Understand Your Investment Needs And Plan Better Financial Solutions For You.

Full Name :

Pan  Cell  Email

Address:

### PERSONAL DETAILS

<p><b>1 What is your current age ?</b></p> <p>A Older than 60 years <input style="width: 50px; height: 20px;" type="text"/></p> <p>B Between 51 To 60 years <input style="width: 50px; height: 20px;" type="text"/></p> <p>C Between 41 To 50 years <input style="width: 50px; height: 20px;" type="text"/></p> <p>D Between 31 To 40 years <input style="width: 50px; height: 20px;" type="text"/></p> <p>E Less than 30 years <input style="width: 50px; height: 20px;" type="text"/></p>	<p><b>2 Your current annual take-home income is :</b></p> <p>A Upto Rs. 5,00,000 <input style="width: 50px; height: 20px;" type="text"/></p> <p>B Rs. 5,00,001 To Rs. 25,00,000 <input style="width: 50px; height: 20px;" type="text"/></p> <p>C Rs. 25,00,001 and Rs. 1,00,00,000 <input style="width: 50px; height: 20px;" type="text"/></p> <p>D Rs. 1,00,00,001 To Rs. 5,00,00,000 <input style="width: 50px; height: 20px;" type="text"/></p> <p>E Rs. 5,00,00,001 and above <input style="width: 50px; height: 20px;" type="text"/></p>
<p><b>3 How many dependents do you have ?</b></p> <p>A None <input style="width: 50px; height: 20px;" type="text"/></p> <p>B 1 <input style="width: 50px; height: 20px;" type="text"/></p> <p>C 2 <input style="width: 50px; height: 20px;" type="text"/></p> <p>D 3 <input style="width: 50px; height: 20px;" type="text"/></p> <p>E 4 Or more <input style="width: 50px; height: 20px;" type="text"/></p>	<p><b>4 What percentage of your monthly income is generally available for investments ?</b></p> <p>A &lt;10% <input style="width: 50px; height: 20px;" type="text"/></p> <p>B 11%-20% <input style="width: 50px; height: 20px;" type="text"/></p> <p>C 21%-30% <input style="width: 50px; height: 20px;" type="text"/></p> <p>D 31%-40% <input style="width: 50px; height: 20px;" type="text"/></p> <p>E &gt;41% <input style="width: 50px; height: 20px;" type="text"/></p>

**i. PREVIOUS INVESTMENT**

Have you invested any money in the past ? If yes, what has been your experience so far ?

A. I have just started investing and do not have any prior investment experience

B. I invest mainly in fixed deposits, post office savings

C. Option b plus debt-based mutual funds, monthly income plans and traditional insurance plans

D. Option b & c plus equity-based mutual funds and ULIPs

E. Option b, c & d plus a mix of equity shares, real estate and derivatives

**ii. TIME HORIZON**

How long would you typically stay invested ?

A. Less than 2 Years

B. Between 2 To 3 Years

C. Between 3 To 5 Years

D. Between 5 To 10 Years

E. Above 10 Years

**iii. EXPECTATIONS**

What is your primary goal while making investment ?

A. Protection of capital

B. Returns in line with inflation

C. Returns above inflation

D. Invest with a goal in mind

E. Invest with a time horizon in mind

**iv. If you invest Rs. 100 today, in five years time, what value range would you be most comfortable with?**

A. Rs. 115 - Rs. 130

B. Rs. 105 - Rs. 155

C. Rs. 99 - Rs. 175

D. Rs. 90 - Rs. 200

E. Rs. 80 - Rs. 225

**v. RISK TAKING ABILITY**

Assuming normal market conditions, what would you expect from investments over a period of time ?

- A. I need to see at least a little return
- B. I would have a hard time tolerating any loss
- C. I can tolerate a small loss
- D. Can tolerate a loss
- E. I Don't mind if I lose money


Date : .....

Signature

**\*\* Note :** Mutual funds are subject to market risk, please read all investments related documents carefully.

Scoring pattern based on responses for each of the above questions

(consider the below mentioned weights) :

- i. 

A = 1
B = 2
C = 3
D = 4
E = 5
- ii.
- iii.
- iv.
- v.


**Risk profile based on the above :**

- A. 5 - 10      - Low Risk
- B. 10 - 20    - Moderate Risk
- C. 20 Above   - High Risk


**\*\* I am aware that the below mentioned investment is a high risk. I am aware and fully responsible for this investment. The distributor has not influenced the investment decision in any manner. They are giving me execution service.**

Date	Fund Name	Signature	Remarks

**Customer Feedback Form**

Please take a few minutes to give us feedback about our service by filling this short Customer Feedback Form. We are conducting this research in order to measure your level of satisfaction with the quality of our service.

Name : \_\_\_\_\_

Overall experience with our service :

- Very Good     Good     Fair     Poor     Very Poor

Feel Free to write any suggestions for Improvement in our services :

Date :

Signature :