



Investment Diversification Factors Affecting Among Investors

I. Demographic profile of the Respondents

Name of the Respondent : _____

Gender :

- Male
- Female

Marital Status :

- Married
- Unmarried

Educational qualification:

- School level
- UG level
- PG level
- Diploma
- Others

Age

- Below 20 yrs
- 21-30 yrs
- 31-40 yrs
- 41-50 yrs
- Above 51 yrs

Occupation

- Business
- Employed
- Self Employed
- Agriculture
- Professional

No. of Dependents

- Below 2 members
- 3-4 members
- 5-6 members
- 7-8 members
- Above 8 members

Annual Income

- Below 100000
- 100001-200000



- 200001-300000
- 300001-400000
- Above 400001

Experience in Investment

- Below 2 yrs
- 3-4 yrs
- 5-6 yrs
- 7-8 yrs
- Above 8 yrs

II. Satisfaction level of Present and Existing Investments in India

Bank Deposit

- Highly Satisfied
- Satisfied
- Neither Satisfied nor Dissatisfied
- Dissatisfied
- Highly Dissatisfied

Mutual Fund

- Highly Satisfied
- Satisfied
- Neither Satisfied nor Dissatisfied
- Dissatisfied
- Highly Dissatisfied

Insurance

- Highly Satisfied
- Satisfied
- Neither Satisfied nor Dissatisfied
- Dissatisfied
- Highly Dissatisfied

Chit Fund

- Highly Satisfied
- Satisfied
- Neither Satisfied nor Dissatisfied
- Dissatisfied
- Highly Dissatisfied



Derivatives

- Highly Satisfied
- Satisfied
- Neither Satisfied nor Dissatisfied
- Dissatisfied
- Highly Dissatisfied

Real Estate

- Highly Satisfied
- Satisfied
- Neither Satisfied nor Dissatisfied
- Dissatisfied
- Highly Dissatisfied

Foreign Currency

- Highly Satisfied
- Satisfied
- Neither Satisfied nor Dissatisfied
- Dissatisfied
- Highly Dissatisfied

Gold

- Highly Satisfied
- Satisfied
- Neither Satisfied nor Dissatisfied
- Dissatisfied
- Highly Dissatisfied

Commodities

- Highly Satisfied
- Satisfied
- Neither Satisfied nor Dissatisfied
- Dissatisfied
- Highly Dissatisfied

Public Provident Fund

- Highly Satisfied
- Satisfied
- Neither Satisfied nor Dissatisfied
- Dissatisfied
- Highly Dissatisfied



Senior Citizen Savings Scheme

- Highly Satisfied
- Satisfied
- Neither Satisfied nor Dissatisfied
- Dissatisfied
- Highly Dissatisfied

Tax Free Bonds

- Highly Satisfied
- Satisfied
- Neither Satisfied nor Dissatisfied
- Dissatisfied
- Highly Dissatisfied

Shares and Securities

- Highly Satisfied
- Satisfied
- Neither Satisfied nor Dissatisfied
- Dissatisfied
- Highly Dissatisfied

III. Diversification Factors Influencing in Selections of Investment Schemes

Future Return

- High
- Medium
- Low

Safety

- High
- Medium
- Low

Children education

- High
- Medium
- Low

Retirement Benefits

- High
- Medium
- Low



Tax Benefit

- High
- Medium
- Low

Vacation Planning

- High
- Medium
- Low

Loan Home into own Home

- High
- Medium
- Low

Luxury Lifestyle

- High
- Medium
- Low

Parental Care

- High
- Medium
- Low

Children Marriage

- High
- Medium
- Low

Debt Free Life

- High
- Medium
- Low

Purchasing of New Asset

- High
- Medium
- Low

Risk Protection

- High
- Medium
- Low



To Meet out Inflation

- High
- Medium
- Low

Security for Income

- High
- Medium
- Low

Standard Income

- High
- Medium
- Low

Charity

- High
- Medium
- Low

Others

IV. Existing Schemes of Investment in Connection with Risk, Return and Time Period

Bank Deposit

- Risk
- Return
- Time Period

Stock Market

- Risk
- Return
- Time Period

Life Insurance

- Risk
- Return
- Time Period

Medical Policy

- Risk
- Return
- Time Period



Real Estate

- Risk
- Return
- Time Period

Gold Investment

- Risk
- Return
- Time Period

Commodity Market

- Risk
- Return
- Time Period

Post Office Savings Schemes

- Risk
- Return
- Time Period

Chit Funds

- Risk
- Return
- Time Period

Mutual Funds

- Risk
- Return
- Time Period

Pension Scheme

- Risk
- Return
- Time Period

Forex Market

- Risk
- Return
- Time Period



V. Preference and Expectation level of New and Investment Schemes going to come in Future

Jewells Insurance Plan

- High
- Medium
- Low

3 in 1 policy (Life, Mediclaim, Accidental)

- High
- Medium
- Low

Inflation Protector Plan

- High
- Medium
- Low

Retirement Plan for All

- High
- Medium
- Low

Gold Deposit

- High
- Medium
- Low

Global Banking System

- High
- Medium
- Low

Unemployment Return's Scheme @ 50%

- High
- Medium
- Low

Youth Business Capital

- High
- Medium



- Low

Soul Other's Trusted Plan

- High
- Medium
- Low

Dolat Investment

- High
- Medium
- Low

Franklin Templeton Investment

- High
- Medium
- Low