



## Investment Profile Analysis

### Age \*

- Below 25 years
- 25-35 years
- 35-45 years
- 45-55 years
- 55 & above

### Gender \*

- Male
- Female

### Educational Level \*

- School Education
- College Education
- Professional
- Others (required)

### Occupation

- Salaried
- Professional
- Business
- Retired
- Other (required)

### Monthly Family Income \*

- Below Rs. 10,000
- Rs. 10,000 – Rs. 20,000
- Rs. 20,000 – Rs. 30,000
- Rs. 30,000 – Rs. 40,000
- Rs. 40,000 & above

### Category of investor \*

- Long term investor
- Day Trader
- Both

### Experience in the Investing \*

- Less than one year
- 1-3 years
- 3-5 years
- More than 5 years





**Rank your Investment preferences (1 to 10) \***

Sl. No.	Statement	1	2	3	4	5	6	7	8	9	10
1	Equity Shares										
2	Debentures and Bonds										
3	Futures and Options										
4	Mutual Funds										
5	NSC/PPF/Post Office										
6	Bank FD										
7	Insurance Policies										
8	Real Estate										
9	Gold, Silver										
10	Others										

**State the level of risk associated with the following investments. \***

Sl. No.	Statement	Very Low	Low	Moderate	High	Very High
1	Equity Shares *					
2	Debentures and Bonds *					
3	Futures and Options *					
4	Mutual Funds *					
5	NSC/PPF/Post Office *					
6	Bank FD *					
7	Insurance Policies *					
8	Real Estate *					
9	Gold, Silver *					
10	Others *					

**State the level of influence of the following factors in investment evaluation and decision \***

Sl. No.	Statement	Low	Moderate	High	Very High
1	Safety of Principal				
2	Returns				
3	Liquidity				
4	Quality of Management of Company				
5	Advice of Analysts				

**State the level of satisfaction achieved, in the following investment objectives \***

Sl. No.	Statement	Highly Satisfactory	Satisfactory	Not Satisfactory
1	Dividends			
2	Capital Appreciation			
3	Quick Gain			
4	Safety			
5	Liquidity			
6	Diversification and risk mitigation			



**The average returns per annum I have got with my portfolio in the last 5 years is (exclude any real estate transactions) \***

- <10%
- 10%-25%
- 25%-40%
- >40%

**Are you aware of benefits of portfolio like risk diversification \***

- Yes
- No

**Are you aware that a Portfolio reduces risk \***

- Yes
- No

**How much you are affected by the following problems in building a portfolio \***

<b>Statement</b>	<b>Very High</b>	<b>High</b>	<b>Moderate</b>	<b>Low</b>
1. Aware of Portfolio Management				
2. Too many channels giving too many opinions				
3. Difficulty in operating online when required				
4. Fear of Unauthorized transactions				
5. Lack of time to monitor				
6. Unable to put transactions when required				
7. Lack of required information				