

Customer Profiling Questionnaire

Only for Reference

Financial Capacity (FC)

1) What is your total annual income before taxes?

- a) Less than 10 lakh
- b) 10 lakh to 25 lakh
- c) Greater than 25 lakh

2) What percentage of your income do you generally save?

- a) Less than 10%
- b) 10% to 25%
- c) Greater than 25%

Risk Attitude (RA)

3) What would you do if your portfolio GAINED 10% in few weeks?

- a) Sell
- b) Hold
- c) Buy

4) In order to achieve your expected returns, you are willing to bear principal loss by?

- a) 0%
- b) 0% to 20%
- c) More than 20%

Others

5) What is your age?

- a) 22 to 40 years
- b) 41 to 45 Years
- c) 46 to 54 Years
- d) Greater than 54 Years