RISK PROFILE

Please fill Risk Profile to Complete Registration for Services

Client Risk Profile-In setting up an investment portfolio suitable for you, we will ask a series of questions about client financial and lifestyle goals. Using this information, plus details of client current assets, liabilities and income, we can determine what level of risk or exposure client are prepared to tolerate in relation to fluctuations in the marketplace - and the level that makes sense for client stage in life. From this, an appropriate mix of assets can be allocated to client investment portfolio. The questionnaire returns a score on the basis of which you fall in either of the category Very Aggressive Investors Aggressive Investors, High Growth Investors & Moderate. This assessment is made solely on the basis of client financial situation and the answers selected by client.

Your Name :-

Contact Number :-

Email ID :-

City :-

Date of Birth :-

dd-mm-yyyy

Gender :-

1. What is your Age Group? [ ]
- Under 35
- Under 45
- 46-55
- 55-60
- 60 Above

2. INVESTMENT OBJECTIVE ? [ ]
- Agressive Growth
- Income and Growth ORIENTED
- Income
- Capital Preservation
- none

3.TIME HORIZON OF TRADING OR INVESTMENT ? [ ]
- INTRADAY TRADING
- 1 TO 4 DAYS
- 1 MONTH
- 3 MONTH
- 6 MONTH

4. EXISTING INVESTMENT AMOUNT. [ ]
- Greater than 5 lac
- 2 to 5 lac
- 1 to 2 lac
- less than 1 lac
- None

5.INCOME DETAILS [ ]
- ABOVE 10 LAKH
- BETWEEN 5 TO 10 LAKH
- BETWEEN 4 TO 5 LAKH
- BETWEEN 1 LAKH TO 3 LAKH
- BELOW 1 LAKH

6.WHAT PERCENTAGE OF MONTHLY INCOME IS ALLOCATED TO PAY OFF DEBT ? [ ]
- BETWEEN 0 TO 20%
- BETWEEN 20 TO 35 %
- BETWEEN 35 TO 45%
- BETWEEN 46 AND ABOVE
- None

7 .Risk Tolerance? [ ]
- Aggressive
- High
- Medium
- Low

8. PROPOSED INVESTMENT OR TRADING AMOUNT [ ]
- Greater than 5 lac
- 2 to 5 lac
- 1 to 2 lac
- less than 1 lac

9.DEGREE OF LOSSES [ ]
- ABOVE 50 %
- BETWEEN 35 TO 50%
- BETWEEN 20 TO 35%
- BELOW 20 %

10 .How was your experience with investing in the market? [ ]
- VERY POSITIVE AND WOULD LIKE TO KEEP ON INVESTING OR TRADING.
- I AM NEW TO MARKET AND CAUTIOUS WHILE INVESTING OR TRADING
- I HAVE INCURRED LOSSES IN THE PAST AND INVEST OR TRADE VERY CAUTIOUSLY
- VERY BAD EXPIRENCE IN INVESTING OT TRADING

Score ( )

If you disagree to the above risk assessment please select services mentioned below that you want to take.

- STOCK CASH TIPS = MODERATE RISK
- STOCK CASH PREMIUM TIPS = MODERATE RISK
- STOCK CASH HNI TIPS = MODERATE RISK
- MCX BASIC TIPS = HIGH RISK
- MCX PREMIUM TIPS = HIGH RISK
- MCX HNI TIPS = HIGH RISK
- STOCK FUTURE TIPS = HIGH RISK
- STOCK FUTURE PREMIUM TIPS = HIGH RISK
- STOCK FUTURE HNI TIPS = HIGH RISK
- NIFTY FUTURE TIPS = MODERATE RISK
- NIFTY FUTURE PREMIUM TIPS = MODERATE RISK
- NIFTY FUTURE HNI TIPS = MODERATE RISK
- NCDEX BASIC TIPS = HIGH RISK
- NCDEX PREMIUM TIPS = HIGH RISK
- NCDEX HNI TIPS = HIGH RISK
- INDEX OPTIONS TIPS = HIGH RISK
- STOCK OPTIONS TIPS = HIGH RISK
- MCX + NCDEX (COMBO PLAN) = HIGH RISK
- INDEX OPTIONS + STOCK OPTIONS (COMBO PLAN) = HIGH RISK
- STOCK CASH + BTST/STBT (COMBO PLAN = MODEARTE TO HIGH RISK
- STOCK FUTURE + STOCK CASH TIPS (COMBO PLAN) = HIGH RISK TO MODERATE RISK
- INDEX FUTURE + STOCK FUTURE (COMBO PLAN)= MODERATE TO HIGH RISK
- INDEX FUTURE + INDEX OPTIONS (COMBO PLAN) = MODERATE TO HIGH RISK
- CASH + FUTURE + OPTIONS (COMBO PACK 3 IN 1) = HIGH RISK
- TECHNO FUNDAMENTAL PACK = MODERATE RISK
- PORTFOLIO REPAIR PACK = MODERATE RISK
- CORPORATE PACK = MODERATE RISK
- CUSTOMERIZED PACK = MODERATE RISK

Risk involved with the above mentioned services will be the responsibilty of the applicant him self.

Above Mentioned Services fall into the risk category chosen by you. If you agree to the above then click Yes .If you do not agree please click NO.

Yes No

(III)Note:-

If you are willing to get telephonic support instead of SMS of our services then all the responsibility of loss or profit whether big or small, through holding or in intraday market, would only be yours and not of the company or any person associated with the company.

If you agree to the above then click "YES".If you do not agree please click "NO".

Yes No

Investment risk profile

In setting up an investment portfolio suitable for you, your financial adviser will ask you a series of questions about your financial and lifestyle goals. Using this information, plus details of your current assets, liabilities and income, your adviser can determine what level of risk or exposure you are prepared to tolerate in relation to fluctuations in the marketplace - and the level that makes sense for your stage in life. From this, an appropriate mix of assets can be allocated to your investment portfolio.

Your Total Score	Your Investment Profile
(33 and Above)-Very Aggressive Investors	As a very aggressive investor you are ready to take higher risk expecting greater returns. This is a result of your urge to get more income and capital growth. You are well place to recover from unforeseen market downturns either because you have time on your side or access to capital returns.
(26-32)-Aggressive Investors	As an aggressive investor you are ready to take higher risk expecting greater returns. This is a result of your urge to get more income and capital growth. You are well place to recover from unforeseen market downturns either because you have time on your side or access to capital returns.
(17-25)-High Growth Investors	As a high growth investor your portfolio should have a bias towards capital growth and a little need of income. You are prepared to accept higher degree of volatility and risk. Your primary concern is to accumulate assets over the medium to long term.
(10-16) Moderate Investor	As a moderate investor your investment portfolio is directly focused on capital growth as well as protecting the wealth already accumulated by you. Your portfolio should be yielding capital for maintaining assets. Calculated risk is accepted to yield better returns.

The questionnaire returns a score on the basis of which you fall in either of the category mentioned above. This assessment is made solely on the basis of your financial situation and the answers selected by you. As your advisor, I and you confirm that we have worked together to determine your risk profile and the investment options that are best suited for your investment style.

Client Signature

DATE