

PARTICULARS	RESPONSE	SCORE
First Name		
Last Name		
DOB		
Email ID		
PAN NO.		
Contact Number		
Address		
CITY		
STATE		
Age Group	UNDER 35	5
	36-45	4
	46-55	3
	56-65	2
	ABOVE 65	1
Marital Status	SINGLE	5
	MARRIED	2
Primary Source of Income	SALARY	-
	BUSINESS	-
Secondary Source of Income	Royalties/Rentals/Dividends	-
	OTHERS	-
ANNUAL INCOME	< 2.5 LACS	2
	2.5-5 LACS	3
	5-10 LACS	4
	> 10 LACS	5
CURRENT INVESTMENT AMMOUNT	<2 LAKH	2
	2-5 LACS	3
	5-10 LACS	4
	>10 LACS	5
PREFERED INVESTMENT TYPE	INTRADAY & SHORT TERM POSITIONAL	2
	MID & LONG TERM	5
INVESTMENT EXPERIENCE	< 1 YEAR	2

	1-3 YEARS	3
	3-7 YEARS	4
	> 7 YEARS	5
<b>HOW IS YOUR EXPERIENCE WITH INVESTMENTS IN PAST</b>	VERY GOOD	5
	GOOD	4
	MODERATE	2
	BAD	1
<b>EXPERIENCE IN MARKET PRODUCTS</b>	STOCKS	1
	DERIVATIVE STOCKS	2
	COMMODITY	3
	FOREX	4
	ALL	5
<b>WHAT IS THE SIZE OF YOUR EMERGRNCY FUND</b>	DO NOT HAVE	1
	< 1 MONTH	2
	1-3 MONTHS	3
	3-6 MONTHS	4
	> 6 MONTHS	5
<b>WHAT PERCENTAGE OF YOUR MONTHLY INCOME IS ALLOCATED TO FIXED DEBT OBLIGATION</b>	NONE	5
	0-20%	4
	20%-35%	2
	35%-50%	1
	>50%	0
<b>You are financially responsible for (exclude dependants who can be supported by your spouse's income)</b>	only yourself	5
	1 other person in your household besides yourself	4

	between 2 and 3 other persons besides yourself	3
	between 4 and 5 other persons besides yourself	2
	more than 5 other persons besides yourself	0
<b>What is your practice on saving money</b>	<b>I don't believe in saving</b>	<b>1</b>
	<b>I'd like to save, but my expenses and other financial commitments do not permit me to</b>	<b>2</b>
	<b>I try to save whenever and wherever possible</b>	<b>4</b>
	<b>I save 15 percent or more of my take-home salary without exception.</b>	<b>5</b>
<b>What is your preference w.r.t securities with low risk, low return</b>		
	Strongly do not prefer	5
	Do not prefer	4
	Indifferent	3
	Prefer	2
	Strongly prefer	1
<b>Which of the following statements would best describe your level of knowledge as an investor</b>		
	I don't understand investment terminology at all	1
	I am not very familiar with investment options and financial planning	2
	I understand the various factors which influence investment performance	4
	I AM a proficient investor and I use research to make investment decisions	5
<b>You invest Rs1,00,000 in a share that goes down by 8% the next day. You</b>	<b>average your cost by investing another Rs1,00,000 at a lower price</b>	<b>4</b>

	do not bother because you had done enough research on the company	3
	book your loss and invest in fixed deposits or bonds	2
	Hold on till the share comes back to your cost price and sell it	5
<b>How would you describe your overall income status?</b>	<b>Just about manage to make ends meet; no monthly savings</b>	<b>0</b>
	<b>My PF and other employment benefits are my only source of savings</b>	<b>2</b>
	<b>I put aside at least 10% of my take-home salary every month in savings</b>	<b>4</b>
	<b>I save more than 30% of my take-home salary every month</b>	<b>5</b>
	<b>My income from my wealth more than adequately provides for my cost of living</b>	<b>3</b>
<b>How long you want to stay invested into Pointed investment?</b>		
	less than a month	1
	1-6 months	2
	6-12 months	4
	beyond 12 months	5
<b>What is your approach to making a financial decision?</b>		
	take a random decision	1
	seek friendly advice	2
	take an educated guess	4
	analyse the various options	5
<b>Occupation</b>	PRIVATE SECTOR	
	PUBLIC SECTOR	
	GOVERNMENT SERVICE	
	BUSINESS	
	PROFESSIONAL	

	AGRICULTURALIST	
	RETIRED	
	HOUSEWIFE	
	STUDENT	
	DEALER	
	OTHER	
SCORE OBTAINED		
<b>TOTAL SCORE</b>		<b>90</b>
<b>Risk Tolerance Capacity</b>		Low/Med/High