

NEUOKOSH CAPITAL PRIVATE LIMITED

kosh@kos
+91 63648
4TH FLOOR
- 560102.

IN ROAD 13TH CROSS ROAD, HSR LAYOUT, SECTOR-1 , BENGALURU, Karnataka, India

Client Name:
Client Code / PAN Number:
EMAIL / Mobile Number:
Address:

Risk Profile

Current Risk Profile: _____

Current Risk Score _____ Out of **60**

Score	Risk Type
0 - 12	Conservative
13 - 24	Moderately Conservative
25 - 36	Balanced
37 - 48	Moderately Balanced
49 - 60	Aggressive

NEUOKOSH CAPITAL PRIVATE LIMITED

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MAIN ROAD 13TH CROSS ROAD, HSR LAYOUT, SECTOR-1 , BENGALURU, Karnataka, India

Client Name:
Client Code / PAN Number:
EMAIL / Mobile Number:
Address:

Questionnaire

Q1. How you describe your family

Options :

- Retired
- Nearing Retirement
- Matured Family
- Young Family
- Single

Score :

Q2. As an investor I would describe myself as

Options :

- Still learning
- Understand Basic
- Fairly experienced
- Understand Few Products i invest in
- Understand all products i invest in

Score :

Q3. As you know investing can fall in portfolio valuations due to volatility in markets. How much fall would make you uncomfortable?

Options :

- I get uncomfortable with any fall
- - 5%
- - 10%
- - 15%
- - 25% and above

Score :

Q4. If Market corrects by 20% and there is no change in the fundamentals of your investment

Options :

- Withdraw all money from the investment and transfer it to bank FD.
- Withdraw and transfer some of the investment into a secured portfolio.
- Will wait till the losses are covered and then withdraw
- Will keep my investments as it is originally aimed at
- Will invest further considering the downturn as an opportunity (selected)

Score :

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4TH FLOOR, 2633, 27TH MAIN ROAD 13TH CROSS ROAD, HSR LAYOUT, SECTOR-1 , BENGALURU, Karnataka, India

- 560025

ber:

:

Q5. Investment Horizon: How many years will you allow your investments to grow before you will need to start significant withdrawals?

Options :

- Less than 1 year
- 1 to 2 years
- 3 to 5 years
- 6 to 8 years
- 8 years plus

Score :

Q6. Do you take loans from the financial markets?

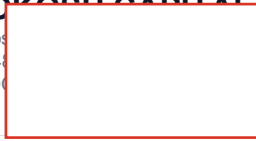
Options :

- Never
- Sometimes if I get a loan
- Yes but a very limited portion of it
- Frequently
- Always

Score :

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- 560102.



13TH CROSS ROAD, HSR LAYOUT, SECTOR-1 , BENGALURU, Karnataka, India

Client Name: XXX YYYY

Client Code / PAN Number:

EMAIL / Mobile Number: [XX](#)

7890

Address: XXXYYYYY



Risk Profile

Current Risk Profile: BALANCED

Current Risk Score 32 Out of **60**

Score		Risk Type
0 - 12		Conservative
13 - 24		Moderately Conservative
25 - 36	✓	Balanced
37 - 48		Moderately Balanced
49 - 60		Aggressive

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AND 13TH CROSS ROAD, HSR LAYOUT, SECTOR-1 , BENGALURU, Karnataka, India

Client Name: XXX YYYY

Client Code / PAN Number: AA 4K

EMAIL / Mobile Number: XXX@ 1234567890

Address: XXXXXXXX

Questionnaire

Q1. How you describe your family

Options :

- Retired
- Nearing Retirement
- **Matured Family ✓**
- Young Family
- Single

Score : 6

Q2. As an investor I would describe myself as

Options :

- Still learning
- Understand Basic
- **Fairly experienced ✓**
- Understand Few Products i invest in
- Understand all products i invest in

Score : 6

Q3. As you know investment can fall in portfolio valuations due to volatility in markets. How much fall would make you uncomfortable?

Options :

- I get uncomfortable
- **- 5% ✓**
- - 10%
- - 15%
- - 25% and above

Score : 4

Q4. If Market corrects by 20% and there is no change in the fundamentals of your investment

Options :

- Withdraw all money from the investment and transfer it to bank FD.
- Withdraw and transfer some of the investment into a secured portfolio.
- **Will wait till the losses are covered then withdraw ✓**
- Will keep my investments as it is
- Will invest further considering the downturn as an opportunity (selected)

Score : 6

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27TH MAIN ROAD 13TH CROSS ROAD, HSR LAYOUT, SECTOR-1 , BENGALURU, Karnataka, India

Client Name: XXX YYYY

Client Code / PAN Number: AAAA

EMAIL / Mobile Number: [XXX@Y](#) 7890

Address: XXXYYYYY

Q5. Investment Horizon How long will you allow your investments to grow before you will need to start significant withdrawals?

Options :

- Less than 1 year
- 1 to 2 years
- 3 to 5 years
- **6 to 8 years ✓**
- 8 years plus

Score : 8

Q6. Do you take loans to invest into the financial markets?

Options :

- **Never ✓**
- Sometimes
- Yes but a very small amount
- Frequently
- Always

Score : 2

***Scoring Pattern: Option 1 = 2, Option 2 = 4, Option 3 = 6, Option 4 = 8, Option 5 = 10 points**