AMIT CHANDRAKANT SHAH

AMFI Registered Mutual Fund Distributor | ARN-83248

RISK PROFILE QUESTIONNAIRE

Name of Investor: _____

PAN: _____

Date: _____

Please tick one option for each question. Marks: (a) = 1, (b) = 2, (c) = 3, (d) = 4.

1. Your age

☐ (a) Above 60 years
☐ (b) 46 to 60 years
☐ (c) 31 to 45 years
☐ (d) 18 to 30 years

2. How long can this money stay invested?

☐ (a) Less than 1 year
☐ (b) 1 to 3 years
☐ (c) 3 to 5 years
☐ (d) More than 5 years

3. If your portfolio falls 20% in a year, what will you do?

☐ (a) Redeem everything
☐ (b) Redeem a part
☐ (c) Hold and wait
☐ (d) Invest more

4. Your income and savings position

☐ (a) Income is not steady; little savings
☐ (b) Steady income; small savings
☐ (c) Steady income; comfortable savings
☐ (d) High income; large savings

Total Score: _____ **Risk Category:** _____

SUITABILITY MATRIX

Risk Category	Score	Equity Share	Scheme categories that may be recommended	Maximum Riskometer
Conservative	4 - 7	0% - 25%	Liquid, Money Market, Short Duration, Corporate Bond, Conservative Hybrid	Low to Moderate
Moderate	8 - 10	25% - 50%	Above, plus Balanced Advantage, Equity Savings, Multi Asset	Up to Moderately High
Moderately Aggressive	11 - 13	50% - 75%	Above, plus Aggressive Hybrid, Large Cap, Index, Flexi Cap, ELSS	Up to High
Aggressive	14 - 16	75% - 100%	Above, plus Mid Cap, Small Cap, Sectoral / Thematic, International	Up to Very High

A scheme is recommended only if its Riskometer is within the investor's risk category.

RISK PROFILE DECLARATION

I have answered the questions above myself. My risk category is _____. I understand that mutual fund investments carry market risk with no guaranteed returns, that schemes will be recommended as per this category, and that Amit Chandrakant Shah earns trail commission from AMCs on Regular Plans, which is part of the scheme's expense ratio and is not charged to me separately.

Name: _____

Date: _____

Signature: _____

Mutual Fund investments are subject to market risks. Read all scheme related documents carefully before investing.