



Investment Questionnaire:

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1. Please provide approx investment amount (INR) in following assets;

- a) Equity/PMS
- b) Mutual Fund Equity/Balance
- c) Mutual Fund Debt
- d) Fixed Deposits
- e) PPF
- f) Property
- g) Land
- h) Bonds
- i) Others-Gold,Commodities,etc

2. Which Asset class you understand best/ you have more knowledge?

3. Which Asset class you find it easy to invest in?

4. Which Asset is giving you best returns?

5. What is your average return on all assets combined?

6. Which is your favorite Asset class or you like the most?

7. Which Asset class you would like to invest next?

8. In which asset class do you want to acquire more knowledge?