

Risk Profiling Questionnaire for Investment Advice

RP Investment Advisor • SEBI Reg. No. INA000021191 • Nallakunta, Hyderabad, Telangana 500044

Personal Information

Name	_____
Email ID	_____
Contact Number	_____
PAN	_____
Marital Status	_____
Select investments you currently own:	<input type="checkbox"/> Equity & Equity Mutual Funds <input type="checkbox"/> Debt & Debt Mutual Funds <input type="checkbox"/> Other (PMS / AIF / Real Estate) Products <input type="checkbox"/> FD & Savings Account

Risk Assessment Questionnaire

Please answer all questions honestly. Your responses will determine your risk profile and guide the investment advice best suited to your needs. **Each option carries a score (shown in gold)** — your total determines your risk category.

Q1 What are your primary investment goals?

<input type="checkbox"/> Regular Income Growth	2
<input type="checkbox"/> Higher returns with some losses in short term	4
<input type="checkbox"/> Long-term value creation with higher short-term losses	6
<input type="checkbox"/> Capital growth/appreciation with moderate volatility	8

Q2 How long do you plan to stay invested?

<input type="checkbox"/> Less than 2 years	2
<input type="checkbox"/> 2 to 5 years	4
<input type="checkbox"/> 5 to 10 years	6
<input type="checkbox"/> More than 10 years	8

Q3 What is the purpose of your investment?

<input type="checkbox"/> Capital preservation	2
<input type="checkbox"/> Regular income	4
<input type="checkbox"/> Long-term growth	6
<input type="checkbox"/> Short-term gains	8

Q4 What is your annual income?

<input type="checkbox"/> Rs. 2.5 Lakhs to Rs. 5 Lakhs	2
<input type="checkbox"/> Rs. 5 Lakhs to Rs. 10 Lakhs	4
<input type="checkbox"/> Rs. 10 Lakhs to Rs. 20 Lakhs	6
<input type="checkbox"/> More than Rs. 20 Lakhs	8

Q5 Market value of portfolio held:

<input type="checkbox"/> Less than Rs. 1 Lakh	2
<input type="checkbox"/> Rs. 1 – 2 Lakhs	4
<input type="checkbox"/> Rs. 2 – 5 Lakhs	6
<input type="checkbox"/> More than Rs. 5 Lakhs	8

Q6 Select your age group:

<input type="checkbox"/> 60 and above	2
<input type="checkbox"/> 41 – 60 years	4
<input type="checkbox"/> 18 – 40 years	6
<input type="checkbox"/> Below 18 years	8

Q7 Value of liabilities or borrowings as on date:

<input type="checkbox"/> Above Rs. 20 Lakhs	2
<input type="checkbox"/> Rs. 10 – 20 Lakhs	4
<input type="checkbox"/> Rs. 5 – 10 Lakhs	6
<input type="checkbox"/> Below Rs. 5 Lakhs	8

Q8 What is your capacity to absorb loss in your investments?

<input type="checkbox"/> Very Low	2
<input type="checkbox"/> Low	4
<input type="checkbox"/> Moderate	6
<input type="checkbox"/> High	8

Q9 What if your investment is down by more than 15%?

<input type="checkbox"/> Sell and preserve cash	2
<input type="checkbox"/> Wait till the market recovers and then sell	4
<input type="checkbox"/> Keep investments as they are	6
<input type="checkbox"/> Invest more	8

Risk Profile Score Interpretation

1	Low	26 or less	Prefers capital preservation; risk-averse; suitable for debt/FD products.
2	Moderate	27 – 52	Balances growth and safety; comfortable with some market volatility.
3	High	53 – 80	Seeks maximum growth; comfortable with significant market fluctuations.

Total Score: _____	Risk Category: _____
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I/We hereby declare that the information provided above is true and accurate to the best of my/our knowledge. I/We understand that the risk profile derived from this questionnaire will be used by the Investment Adviser to provide suitable investment advice as per SEBI (Investment Advisers) Regulations, 2013.

CLIENT SIGNATURE	DATE	ADVISER SIGNATURE
_____	_____	_____