



RISCH WEALTH & RISCH FAMILY OFFICE

We Manage Portfolios



OUR MISSION - INVESTOR SUCCESS

Investors Trust Us Because We Put Them First

Great Investing Makes Everyone Shine

Great investing means understanding investors' hopes, dreams, and ideals to find out what really matters. It doesn't just focus on the finish line-it focuses on the journey.

The Time for Great Investing is now

The need for great investing exists at every corner of our financial lives-from saving to major life events, to retirement and inheritance planning.

 PERSONAL |  VISIONARY |  INSPIRING |  TRANSPARENT

 PATIENT |  INDEPENDENT |  STRAIGHT FORWARD



TRANSPARENCY IS OUR POLICY.
LEARN HOW IT IMPACTS EVERYTHING WE DO.
LET'S GET STARTED & REDEFINE SUCCESS TOGETHER

We Have A Dedicated Support Team

CONTACT US:

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Mutual Fund investments are subject to market risks, read all scheme related documents carefully. The NAVs of the schemes may go up or down depending upon the factors and forces affecting the securities market including the fluctuations in the interest rates. The past performance of the mutual funds is not necessarily indicative of future performance of the schemes. The Mutual Fund is not guaranteeing or assuring any dividend under any of the schemes and the same is subject to the availability and adequacy of distributable surplus. Investors are requested to review the prospectus carefully and obtain expert professional advice with regard to specific legal, tax and financial implications of the investment/ participation in the scheme.

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Time Horizon Response

Question: 1. How long can you keep your money invested in the market before needing access to it?

Answer: 10 years & more

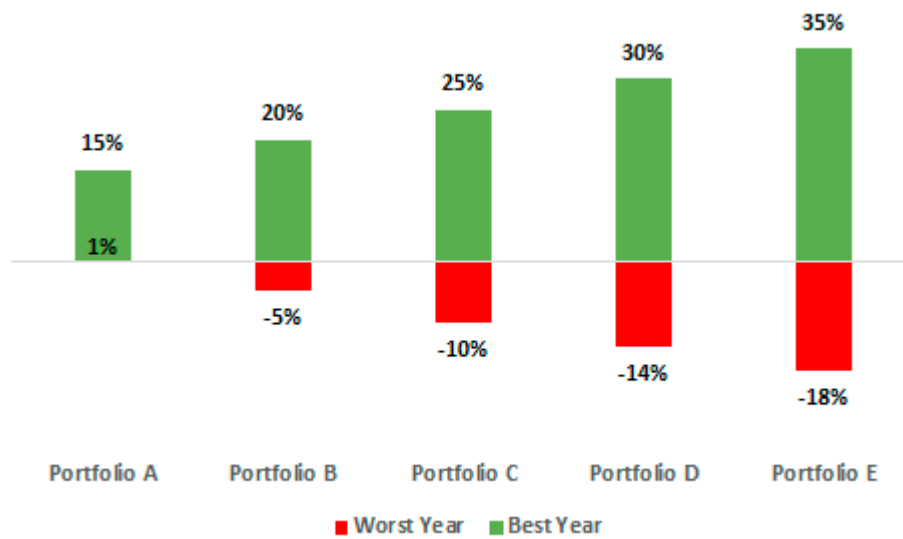
Question: 2. Till what period would you like to continue to withdraw your investments?

Answer: Withdrawal upto 5 yrs (monthly)

Risk Preference Response

Question: 1. Risky investments usually provide higher returns. What is your desired balance?

Answer: My goal is to achieve unstable but potentially much higher returns



Question: 2. Which of these scenarios best describes your "Risk Range"? What level of losses and profits would you be comfortable with in your portfolio?

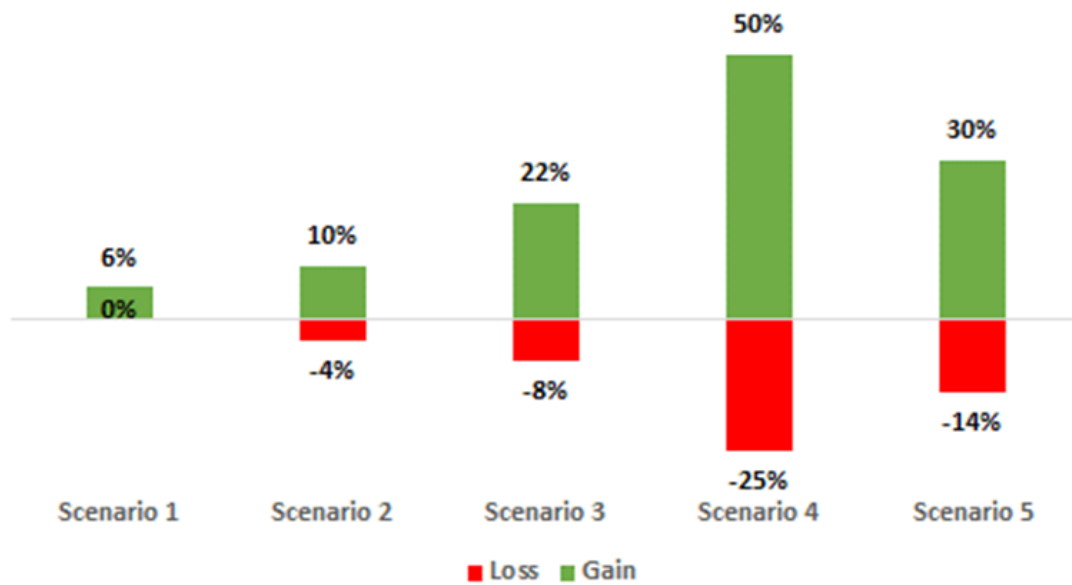
Answer: Portfolio E

Question: 3. Which of the following best describes your portfolio risk-return preference?

Answer: Maximize long term returns - willing to accept sharp drawdowns over the short term

Question: 4. If a few months after investing, the value of your portfolio declines by 20%, what would you do?

Answer: You are ok with volatility and accept decline in portfolio value as a part of investing. You would keep your investments as they are.



Question: 5. From the following 5 possible portfolio scenarios, please select the option which defines your investment objective?

Answer: Scenario 5

Question: 6. With a view to achieve higher long term returns, you are willing to accept sharp & frequent drawdowns in your portfolio value.

Answer: Somewhat agree

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D.O.B: 2023-03-15

Pan-Number : test12test

Address : ssadasfdsfsf

Amount to Invest : ₹55,00,000.00

Time Horizon Score: 14

Risk Preference Score: 93

Portfolio: Income & Growth Portfolio

About This Portfolio: This portfolio reflects expectations of calculated risks to achieve returns better than defensive asset classes and inflation.

Asset Allocation:

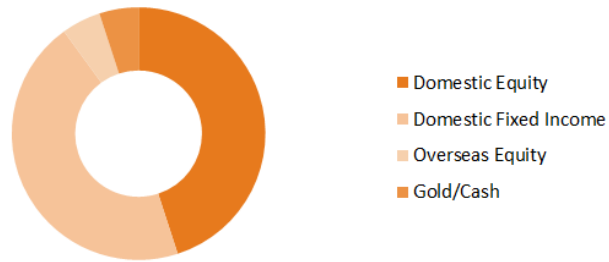
Domestic Equity: 25-55%

Domestic Fixed Income: 30-60%

Overseas Equity: 0-10%

Gold/Cash: 0-10%

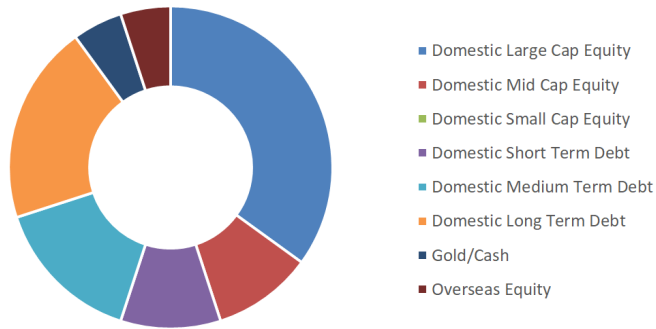
Income & Growth Portfolio



For ₹55,00,000.00

Category Allocation	Exposure	Amount (Rs)
Domestic Equity	45%	₹24,75,000.00
Domestic Fixed Income	45%	₹24,75,000.00
Overseas Equity	5%	₹2,75,000.00
Gold/Cash	5%	₹2,75,000.00
Grand Total	100 %	₹55,00,000.00

Income & Growth Portfolio (%)



For ₹55,00,000.00

Category Allocation	Exposure	Amount (Rs)
Domestic Large Cap Equity	35%	₹19,25,000.00
Domestic Mid Cap Equity	10%	₹5,50,000.00
Domestic Small Cap Equity	0%	₹0.00
Domestic Short Term Debt	10%	₹5,50,000.00
Domestic Medium Term Debt	15%	₹8,25,000.00
Domestic Long Term Debt	20%	₹11,00,000.00
Gold/Cash	5%	₹2,75,000.00
Overseas Equity	5%	₹2,75,000.00
Grand Total	100 %	₹55,00,000.00