

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: Immediately - one single withdrawal

Risk Preference Response

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

Answer: My goal is to achieve stable & reliable returns but slightly better than inflation

risk question image

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 C

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

Answer: More focused on long term returns as volatility tends to reduce over the long 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.

risk question image

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

Answer: Scenario 4

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

Answer: Strongly disagree

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Amount to Invest : ₹70,00,000.00

Time Horizon Score: 11

Risk Preference Score: 53

Portfolio: Moderate Portfolio

About This Portfolio: This portfolio reflects expectations of relatively higher risks to achieve relatively higher returns.

Asset Allocation:

Domestic Equity: 50-80%

Domestic Fixed Income: 10-40%

Overseas Equity: 10-15%

Gold/Cash: 0-10%

Asset Allocation



For ₹70,00,000.00

Asset Allocation	Exposure	Amount (Rs)
Domestic Equity	60%	₹42,00,000.00
Domestic Fixed Income	25%	₹17,50,000.00
Overseas Equity	10%	₹7,00,000.00
Gold/Cash	5%	₹3,50,000.00
Grand Total	100 %	₹70,00,000.00

Category Wise Asset Allocation



For ₹70,00,000.00

Asset Allocation Category	Exposure	Amount (Rs)
Domestic Large Cap Equity	30%	₹21,00,000.00
Domestic Mid Cap Equity	20%	₹14,00,000.00
Domestic Small Cap Equity	10%	₹7,00,000.00
Domestic Short Term Debt	5%	₹3,50,000.00
Domestic Medium Term Debt	10%	₹7,00,000.00
Domestic Long Term Debt	10%	₹7,00,000.00
Gold/Cash	5%	₹3,50,000.00
Overseas Equity	10%	₹7,00,000.00
Grand Total	100 %	₹70,00,000.00