



## **RISCH WEALTH & RISCH FAMILY OFFICE**

**We Manage Portfolios**



### **OUR MISSION - INVESTOR SUCCESS**

**Investors Trust Us Because We Put Them First**

# 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

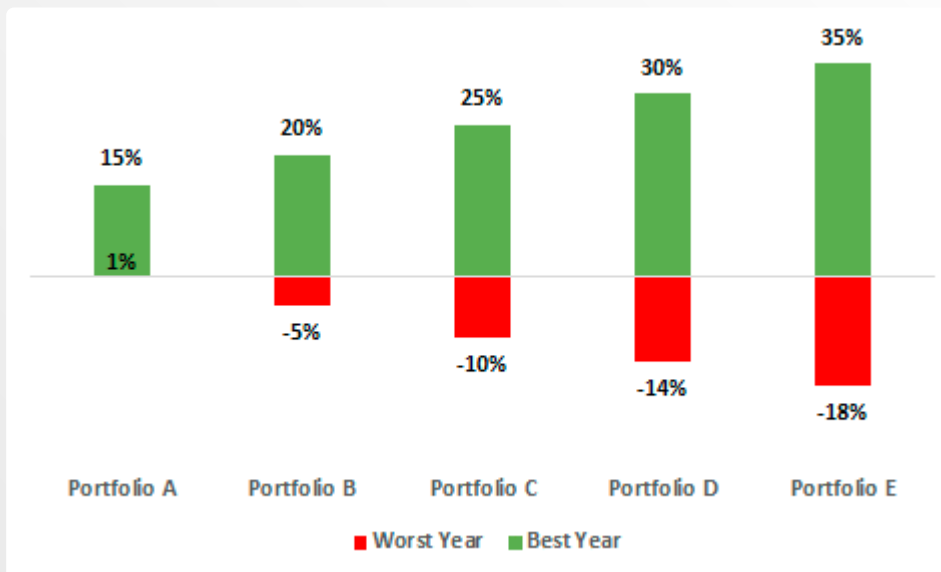
Question: 2. Till what period would you like to continue to withdraw your investments?

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 higher returns even if entails moderate variability in 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?

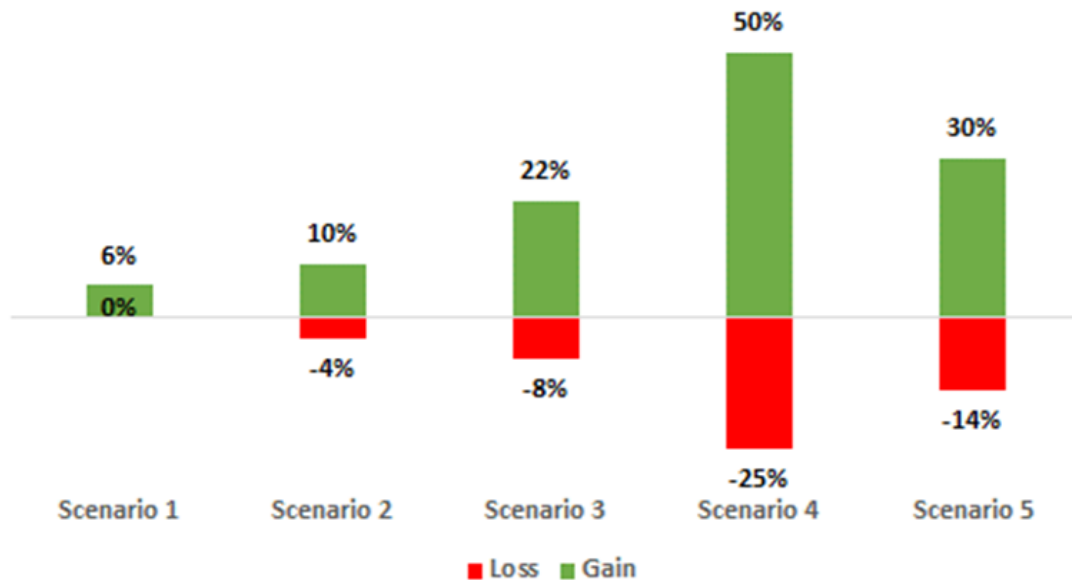
Answer: Portfolio C

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 would be worried, but would give your portfolio a little more time.



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: Agree

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Amount to Invest : ₹55,55,547.00

Time Horizon Score: 11

Risk Preference Score: 62

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Portfolio: Income & Growth Portfolio

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

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Asset Allocation:

Domestic Equity: 25-55%

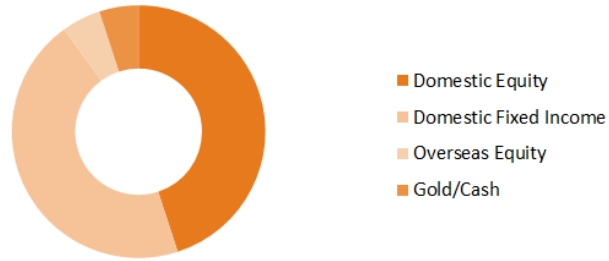
Domestic Fixed Income: 30-60%

Overseas Equity: 0-10%

Gold/Cash: 0-10%

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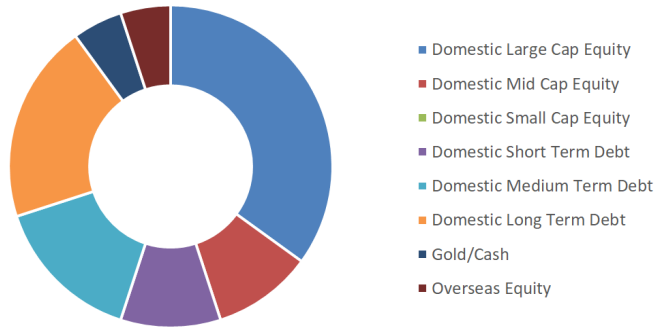
### Income & Growth Portfolio



For ₹55,55,547.00

Category Allocation	Exposure	Amount (Rs)
Domestic Equity	45%	₹24,99,996.15
Domestic Fixed Income	45%	₹24,99,996.15
Overseas Equity	5%	₹2,77,777.35
Gold/Cash	5%	₹2,77,777.35
Grand Total	100 %	₹55,55,547.00

Income & Growth Portfolio (%)



For ₹55,55,547.00

Category Allocation	Exposure	Amount (Rs)
Domestic Large Cap Equity	35%	₹19,44,441.45
Domestic Mid Cap Equity	10%	₹5,55,554.70
Domestic Small Cap Equity	0%	₹0.00
Domestic Short Term Debt	10%	₹5,55,554.70
Domestic Medium Term Debt	15%	₹8,33,332.05
Domestic Long Term Debt	20%	₹11,11,109.40
Gold/Cash	5%	₹2,77,777.35
Overseas Equity	5%	₹2,77,777.35
Grand Total	100 %	₹55,55,547.00



## 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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