



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

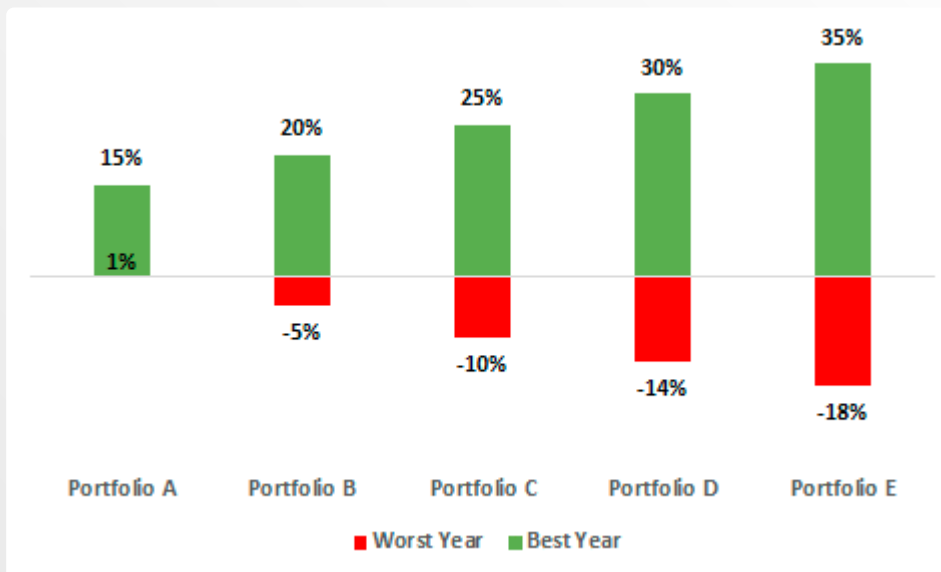
Question: 2. Till what period would you like to continue to withdraw your investments?

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?

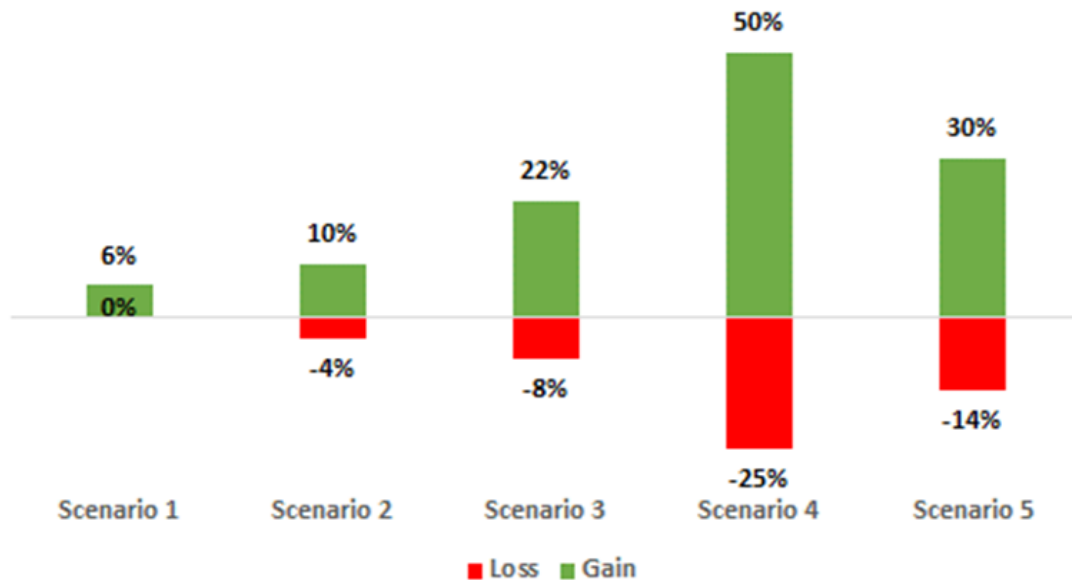
Answer: Portfolio C

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 : ₹4,58,45,848.00

Time Horizon Score: 11

Risk Preference Score: 62

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:

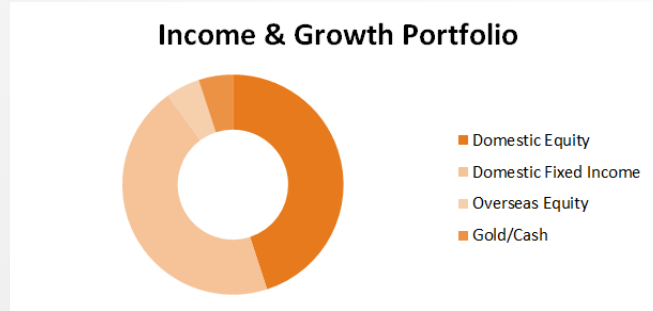
Domestic Equity: 25-55%

Domestic Fixed Income: 30-60%

Overseas Equity: 0-10%

Gold/Cash: 0-10%

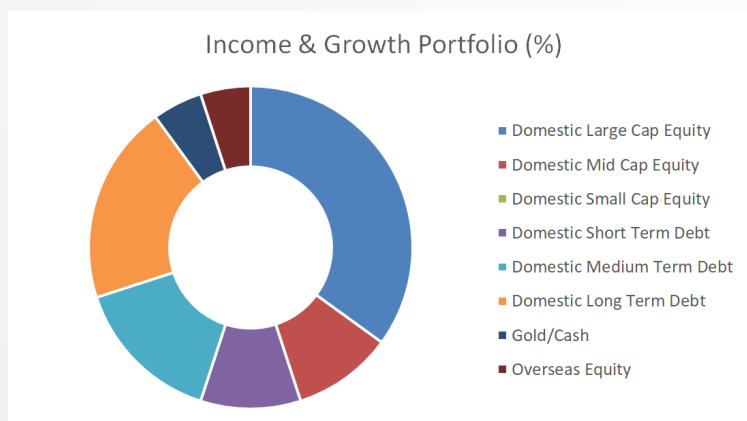
Asset Allocation



For ₹4,58,45,848.00

Asset Allocation	Exposure	Amount (Rs)
Domestic Equity	45%	₹2,06,30,631.60
Domestic Fixed Income	45%	₹2,06,30,631.60
Overseas Equity	5%	₹22,92,292.40
Gold/Cash	5%	₹22,92,292.40
Grand Total	100 %	₹4,58,45,848.00

Category Wise Asset Allocation



For ₹4,58,45,848.00

Asset Allocation Category	Exposure	Amount (Rs)
Domestic Large Cap Equity	35%	₹1,60,46,046.80
Domestic Mid Cap Equity	10%	₹45,84,584.80
Domestic Small Cap Equity	0%	₹0.00
Domestic Short Term Debt	10%	₹45,84,584.80
Domestic Medium Term Debt	15%	₹68,76,877.20
Domestic Long Term Debt	20%	₹91,69,169.60
Gold/Cash	5%	₹22,92,292.40
Overseas Equity	5%	₹22,92,292.40
Grand Total	100 %	₹4,58,45,848.00

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.



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

We Have A Dedicated Support Team

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