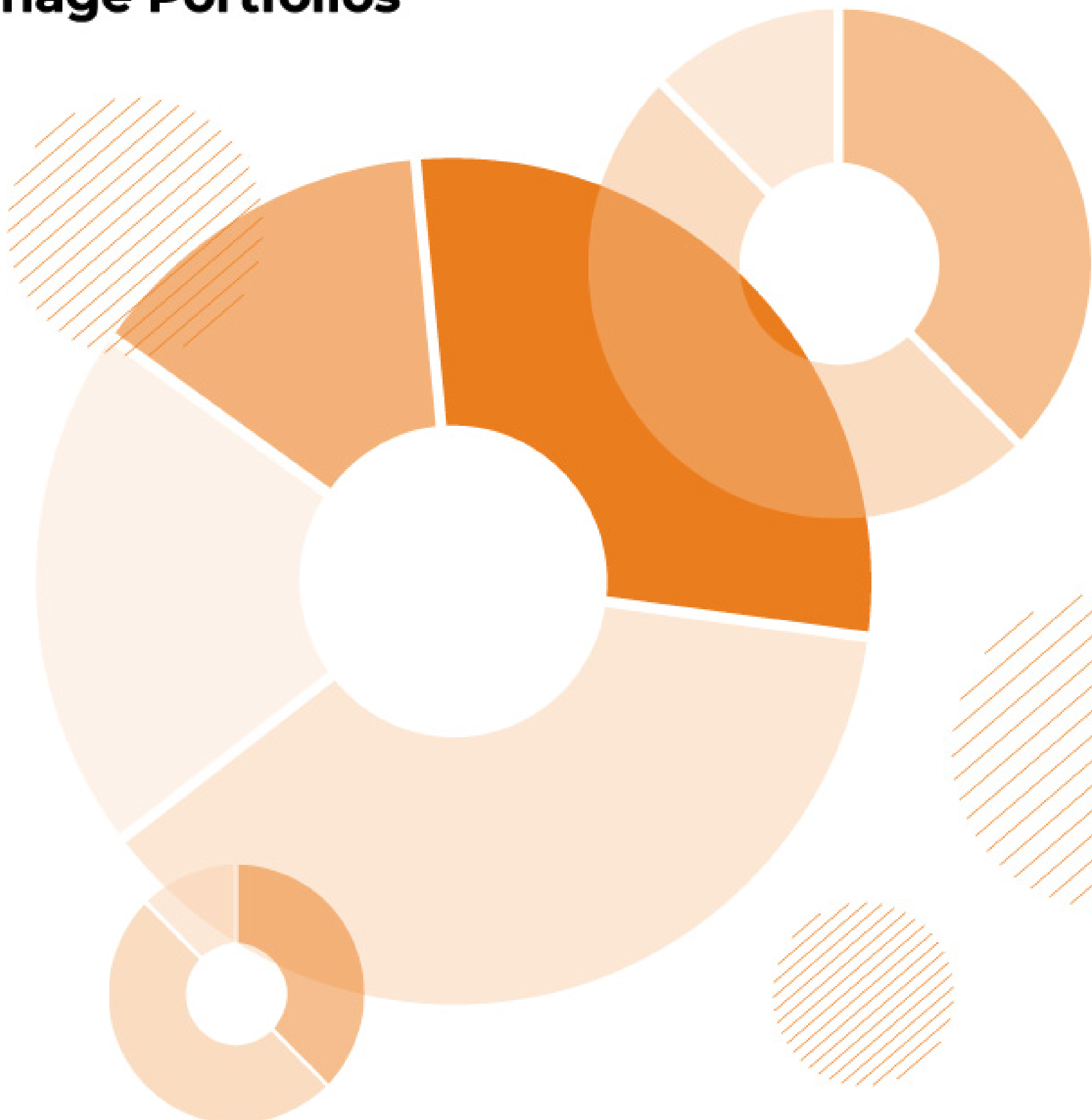
RISCH
Wealth Pvt. Ltd.

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

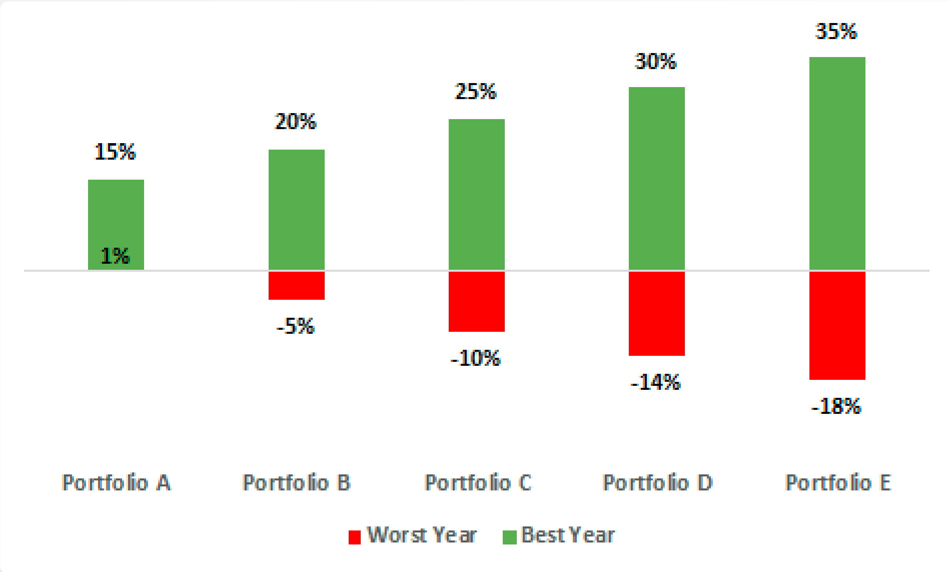
Question: 2. Till what period would you like to continue to withdraw your investments?

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?

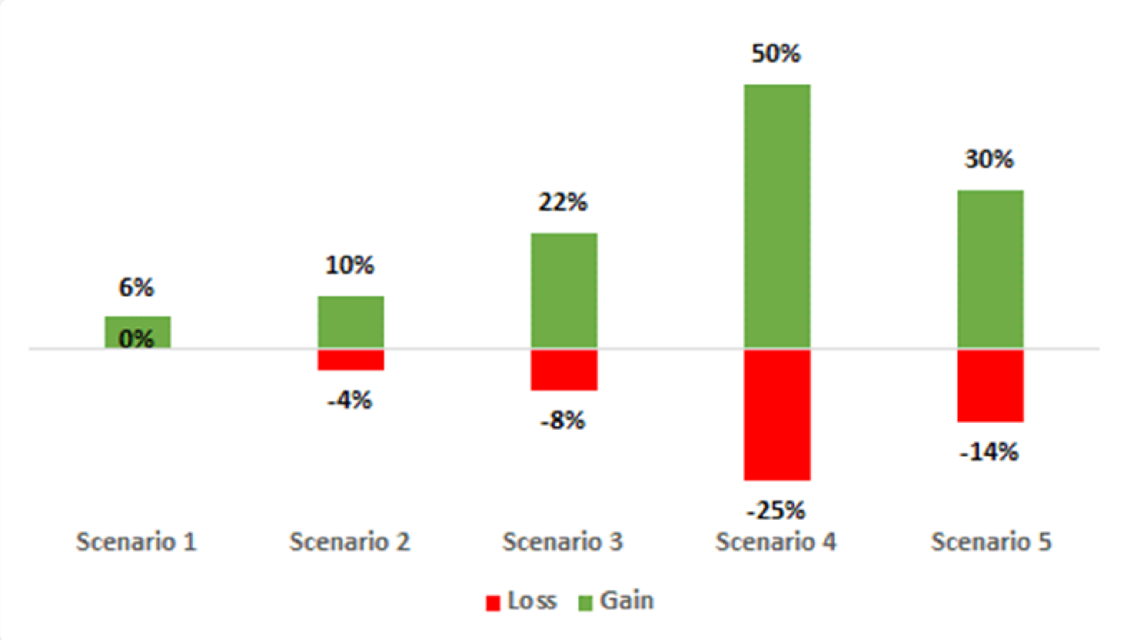
Answer: Portfolio C

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:

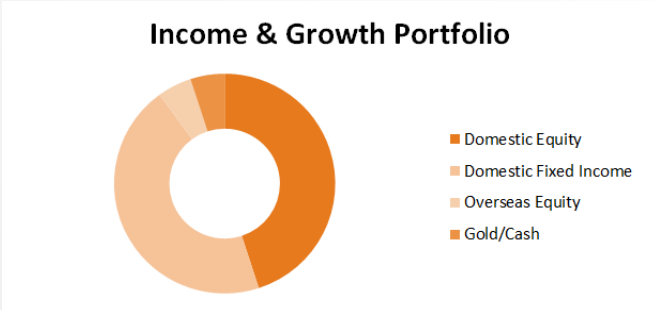
Domestic Equity: 25-55%

Domestic Fixed Income: 30-60%

Overseas Equity: 0-10%

Gold/Cash: 0-10%

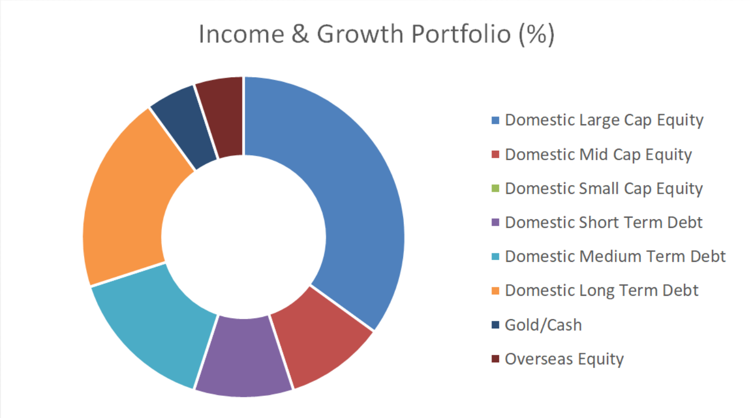
Asset Allocation



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.

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

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