

Time Horizon Response

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

Answer: 3 to 5 years


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 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 B

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.

 risk question image

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

Answer: Scenario 2

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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D.O.B: 2023-04-21

Pan-Number : hsjirjg4f5

Address : room no 19/A,rajbali dube
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mumbai-70

Amount to Invest : ₹55,55,655.00

Time Horizon Score: 6

Risk Preference Score: 32

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 ₹55,55,655.00

Asset Allocation	Exposure	Amount (Rs)
Domestic Equity	45%	₹25,00,044.75
Domestic Fixed Income	45%	₹25,00,044.75
Overseas Equity	5%	₹2,77,782.75
Gold/Cash	5%	₹2,77,782.75
Grand Total	100 %	₹55,55,655.00

Category Wise Asset Allocation



For ₹55,55,655.00

Asset Allocation Category	Exposure	Amount (Rs)
Domestic Large Cap Equity	35%	₹19,44,479.25
Domestic Mid Cap Equity	10%	₹5,55,565.50
Domestic Small Cap Equity	0%	₹0.00
Domestic Short Term Debt	10%	₹5,55,565.50
Domestic Medium Term Debt	15%	₹8,33,348.25
Domestic Long Term Debt	20%	₹11,11,131.00
Gold/Cash	5%	₹2,77,782.75
Overseas Equity	5%	₹2,77,782.75
Grand Total	100 %	₹55,55,655.00