

# Financial Plan Investor Guide - Priya Sharma

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## 1. Investor Profile

**Name:** Priya Sharma

**Profile ID:** W8

**Profile Description:** Established Professional, Moderate Growth Focus

**Date of Birth:** 1985-07-15

**Occupation:** White-Collar

**Contact:** 9876543210 | priya.sharma@example.com

## 2. Risk Assessment Summary

**Overall Risk Score:** 65/100

**Risk Rating:** Moderate Growth

*Note: This score reflects your capacity and tolerance for investment risk.*

## 3. Financial Goals Overview

Goal Type	Target Amount	Timeline (Years)	Priority	Suggested SIP (Base Case)
Child Education	₹1,500,000.00	10	1	₹8,500.00
Retirement	₹10,000,000.00	20	2	₹15,000.00

## 4. Savings & Investment Potential

**Recommended Monthly Savings:** ₹25,000.00

**Disposable Monthly Income:** ₹75,000.00

**Savings Rate (of Disposable Income):** 33.33%

**Feasibility Index:** 66.67%

## 5. Suggested Asset Allocation

*Detailed asset allocation based on your profile and goals:*

Asset Class	Allocation
Equity (Large Cap)	40%
Equity (Mid/Small Cap)	20%
Debt (Long Term)	30%
Gold	10%

## 6. Recommended Action Plan

- Initiate SIP of ₹8,500 in a diversified equity fund for Child Education.
- Increase retirement SIP to ₹15,000.

## 7. Current Economic Outlook & Considerations

**GDP Growth Rate:** 6.5%

**Inflation Rate (CPI):** 5.2%

**Repo Rate:** 6.5%

*Note: Economic conditions can impact investment returns. Regular reviews are advised.*

Disclaimer: This financial plan is based on the information provided and current market understanding. Investment in securities market are subject to market risks. Read all the related documents carefully before investing. Past performance is not indicative of future results. Consult with your MFD for personalized advice.