

PROJECT REPORT QUESTIONNAIRE

Dear Sir/ Madam

I am Ronak Shah a student of N.L. Dalmia Institute of Management Studies and Research, doing my final year MBA as part of the curriculum;

I am conducting a survey on "STUDY ON THE PREFERENCE OF SALARIED PEOPLE ON VARIOUS INVESTMENT OPTIONS AVAILABLE". I request you to kindly give me your valuable time to fill this questionnaire. I assure you that the data provided by you will be kept confidential.

1. Full Name

2. Gender

Male

Female

Trans

Do not wish to disclose

3. Age Group

0-18

18-30

30-50

50-65

65+

4. Education

Up to Intermediate

Graduate

Post Graduate

Professionals

Other

5. Organization

Government

Private

Self Employed

Retired

6. Income Level

0-2.5 Lakhs

2.5-5 Lakhs

5-7.5 Lakhs

7.5-10 Lakhs

Above 10 Lakhs

7. Marital Status

Single

Married

Do not want to disclose

8. Which of the following investment avenues are you aware of?

Banking
Stock Market
Mutual Funds
Gold
Life Insurance
Post Office Savings
Real Estate
PPF
Government Bonds

9. Which sector do you prefer to invest your money?

Banking
Stock Market
Mutual Funds
Gold
Life Insurance
Post Office Savings
Real Estate
PPF
Government Bonds

10. What percent of your income do you invest?

0-10%
10-20%
20-30%
30-40%

11. What is your investment objective?

Income & Capital Preservation
Growth & Income
Short Term Growth
Long Term Growth

12. What is the time period you prefer to invest?

Short Term (0-1years)
Medium Term (1-5years)
Long Term (>5 years)

13. Rank the following investment avenues in the order of your preferences

Banking
Stock Market
Mutual Funds
Gold
Life Insurance
Post Office Savings
Real Estate
PPF
Government Bonds

14. What are the important factors guiding your investment decisions? (Rank them in order of preference)

Inflation Cover
Returns
Safety of Principle
Diversification
Tax Benefits
Maturity Period
Risks
Liquidity
Others

15. What level of risk are you willing to undertake for your investment avenue?

Less Risk
Moderate Risk
High Risk

16. Whose advice do you seek on your investment decisions?

Local Brokers
Newspaper & Magazines
Financial Professionals (i.e. CA, Financial Planner etc.)
Bank
Family & Friends
Other

17. How do you time your investment?

Monthly
Quarterly
Half Yearly
Yearly

18. How often do you monitor your investment?

Daily
Monthly
Occasionally

19. Do you have a formal budget for family expenditure?

Yes
No

20. If Yes, what factors do you consider while preparing the budget?

Family Income
Family Size
Age of Family Members
Purpose of Investment
Returns on Investment
Average Expenses

21. According to you during the COVID-19 times which is the most preferred Investment Avenue?

Banking

Stock Market

Mutual Funds

Gold

Life Insurance

Post Office Savings

Real Estate

PPF

Government Bonds

22. Has COVID-19 affected your Investment Strategies?

Yes

No

23. If Yes, then how?