

# Value Investing

"A study of Portfolio Selection and Performance Evaluation through Value Investing".

Survey is conducted for my Research and analysis for the particular topic. To gain knowledge and to study Investor thinking for Portfolio Selection. This data will be used only for the Research project of my study.

1. Name

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2. Age

*Mark only one oval.*

- ☐ 0-20 Years
- ☐ 21-40 Years
- ☐ Above 40 years

### 3. Occupation

*Mark only one oval.*

☐ Self- Employed

☐ Employee

☐ Student

☐ Profession

### 4. Annual Income

*Mark only one oval.*

☐ Below 1 Lakh Rupees

☐ 2-5 Lakh Rupees

☐ 6-10 Lakh Rupees

☐ More than 10 Lakh

5. How much is your savings in a year?

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- ☐ Less than 50000 Rs
- ☐ 50001-100000 Rs
- ☐ 100001- 200000 Rs
- ☐ More than 200000

6. How much money are you approximately investing in a Year?

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- ☐ less than 50000 Rs
- ☐ 50001- 100000 Rs
- ☐ 100001-200000 Rs
- ☐ 200001-400000 Rs
- ☐ More than 400000 Rs

7. Do you Know the concept of Value Investing?

*Mark only one oval.*

☐ Yes

☐ No

8. Do you consider value Investing for your Investment?

*Mark only one oval.*

☐ Yes

☐ No

9. Do you buy stocks which are trading less than there book value or Intrinsic value?

*Mark only one oval.*

☐ Yes

☐ No

10. According to you, To become Value Investor what type of quality an Investor must have?

*Tick all that apply.*

- ☐ Patience
- ☐ Discipline
- ☐ Intellect
- ☐ Good-Decision Making

11. To Examine companies financial which type of Ratio you look for value Investing?

*Tick all that apply.*

- ☐ Price to Book Ratio
- ☐ Price to Earning Ratio
- ☐ Debt-Equity Ratio
- ☐ Return on Equity
- ☐ Dividend Payout Ratio
- ☐ Any other Ratio

12. Which Statement best describe Your knowledge of investments?

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- ☐ I have very little knowledge of investment and financial market
- ☐ I have a moderate level of knowledge of investment and financial market
- ☐ I have extensive investment knowledge: understanding of different investment product and follow financial market closely.

13. What is your investment objective?

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- ☐ To keep money safe for certain time period
- ☐ To generate income and Less concerned about value of investment
- ☐ Primary goal is value investing and growth in long term horizon

14. How long you can stay invested in stocks?

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- ☐ 1-2 years
- ☐ 2-5 years
- ☐ More than 5 years

15. What type of portfolio you prefer from the following?

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- ☐ Very conservative- 100% Money market instrument and GIC
- ☐ Conservative- 75% Fixed income 25% Equities
- ☐ Balanced- 60% Equities 40% Fixed income
- ☐ Growth- 80% Equities 20% Fixed income
- ☐ Aggressive Growth- 100% Equities

16. How much return you prefer for a stock?

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- ☐ 5-10% Return
- ☐ 10-20% Return
- ☐ 20-40% Return
- ☐ More than 40% Return

17. In which assets class company you would prefer to invest?

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☐ Large cap

☐ Mid-cap

☐ Small cap

18. If your stock value decrease by 50%, How will you react on it?

*Mark only one oval.*

☐ Sell stock

☐ Accumulate stock

☐ Be patient and wait for long term good return

19. Which factor you consider most from the following in the company for buying stock?

*Mark only one oval.*

☐ Good Quarter Result

☐ Core-Competencies

☐ Goodwill of company

☐ Evaluation of past performance



20. In which category you belong as a Investor?

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- ☐ High Risk and High Return
- ☐ Moderate Risk and Moderate Return
- ☐ Low Risk and Low Return

21. How much importance you give to Time frame and Risk Aversion in your portfolio selection?

*Mark only one oval.*

- ☐ High Importance
- ☐ Less Importance

22. In which type of Economic Situation you find the opportunity to Invest?

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- ☐ Depression
- ☐ Inflation
- ☐ Steady Situation

23. Among the following stocks which stock you would prefer to hold for long-Term Investing?

*Mark only one oval.*

- ☐ HDFC Bank
- ☐ TATA Motors
- ☐ Adani Port
- ☐ Reliance
- ☐ SUN Pharmaceutical

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