

	Investment Suitability Profile Questionaire	CHAMILIA START SMALL WITHOUT STANDS		
Name :				
Age:				
Investment period				
0 -2 Years				
2 - 5 Years				
5 - 10 Years				
10+ Years				
QUESTION 1				
"I consider myself to be knowledgeable about investments and financial matters"				

- A. Strongly agree
- B. Somewhat agree
- C. Disagree

QUESTION 2

How secure do you think is your current and future income?

- A. Reasonably stable
- B. Somewhat stable
- C. Unstable

QUESTION 3

Which of the following statements best describes your investment objective?

- A. Protect the value of my investment
- B. Balance risk and return
- C. Maximise long-term investment returns



QUESTION 4

Which of the following statements is true about your current savings / investments?

Α. 🦪	Presently,	do not	have r	nuch	savings /	investments
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B. I do have some savings / investments but not enough to meet my future goals

C. I already have good savings / investments to meet future goals

QUESTION 5

"I am comfortable with investments that may frequently experience large declines in value if there is a potential for higher return"

Α. (Agree

B. Somewhat Agree

C. Disagree

QUESTION 6

We have outlined the most likely best-case and worst-case annual returns of four hypothetical investment plans. Which range of possible outcomes is most acceptable to you?

Annual Average, Best Case, Worst Case

A. 6.00%, 8.00%, -1.00%

B. 8.00%, 12.00%, -4.00%

C. 10.00%, 15.00%, -7.00%

D. 12.00%, 25.00%, -18.00%

QUESTION 7

Do you have any loans for which monthly EMI is being paid?

A. I have no loans outstanding

B. I am little uncomfortable with my loan / EMI

C. I am comfortable with my loan / EMI



Are you comfortable with a part of your portfolio invested in equity related products which can be very worth to be a confortable with a part of your portfolio invested in equity related products which can be very worth to be a confortable with a part of your portfolio invested in equity related products which can be very worth to be a confortable with a part of your portfolio invested in equity related products which can be very worth to be a confortable with a part of your portfolio invested in equity related products which can be very worth to be a confortable with a part of your portfolio invested in equity related products which can be very worth to be a confortable with a part of your portfolio invested in equity related products which can be very worth to be a confortable with a part of your portfolio invested in equity related products which can be very worth to be a confortable with a part of your portfolio invested in equity related products which can be very worth to be a confortable with a part of your portfolio invested in equity related products which can be very worth to be a confortable with a part of your portfolio invested in equity related products which can be very worth to be a confortable with a confortable with a part of your portfolio invested in equity related products which can be very worth to be a confortable with a confortable wit and may result in negative returns, specially in the short term?

A. Not at all comfortable	
B. I don't mind	
C. I am comfortable	
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Date	Signature