

Lucky Investments

TO BE FILLED BY INVESTOR

Help us understand your needs better. Kindly the form below to give you a customized solution for your investment goals. Circle the below responses as per your choices:

Name:	
Folio No.:	

Already Provided: ☐ No change in previous details

Age (in yrs)	☐ 1. Above 60	☐ 2. 50-60	☐ 3. 40-50	☐ 4. Below 40
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Risk-Return Tolerance Level	Monthly Saving	Occupation
☐ 1. Lower Risk, Lower Returns	☐ 2. Rs. 1,000 - Rs. 25,000	☐ 1. Retired
☐ 4. Medium Risk, Medium Returns	☐ 3. Rs. 25,000 - Rs. 50,000	☐ 2. Housewife/Student
☐ 8. Higher Risk, Higher Returns	☐ 4. Above Rs. 50,000	☐ 3. Salaried
		☐ 4. Business/Self Employed

Investment Objective	Your Level of Knowledge of Investments and Financial Markets?	Investment Horizon
☐ 2. Cash Management	☐ 2. Limited/Basic/Average	☐ 2. Less than 6 months
☐ 4. Monthly Income	☐ 3. Good/Excellent	☐ 4. 6 months to 1 year
☐ 8. Capital Growth/Long Term Saving/Retirement		☐ 6. 1 year to 3 years
		☐ 8. More than 3 years

Now, please add the scores corresponding to your selected choices & calculate in the below table to find your ideal investment fund.

Calculate your Ideal Portfolio	Scores	Investor Portfolio	Funds
	33-39	High	Equity
	24-32	Medium	Capital Protected
	15-23	Moderate	Income
	11-14	Low	Money Market / Fixed Rate/Return

NOTE:

I/We hereby confirm that all information provided in this form is true and correct to the best of my/our knowledge. I/We also confirm having read and understood the Trust Deeds, Offering Documents, Supplemental Offering Documents that govern the transactions and further acknowledge understanding of the risks involved in Mutual Funds. Further, I/We declare to have understood and completed this entire Risk/Return Profiling Questionnaire.

I/we understand and agree that as per my/our Risk, Lucky Investments has suggested the above fund category to me/us but I/we can/may invest in any other fund category as per my/our discretion.

[illegible]

Signature of Principal / Joint Account Holder(s)

Name of Sales Person	Name of Manager
Signature of Sales Person	Signature of Manager