

ANNEXURES

ANNEXURE I

SCHEDULE

A. INFORMATION ABOUT PSYCHOGRAPHICS

Sr No	VALS	Mostly Disagree	Somewhat disagree	Somewhat agree	Mostly agree
1	I am often interested in theories.				
2	I like outrageous people and things.				
3	I like a lot of variety in my life.				
4	I love to make things I can use every day.				
5	I follow the latest trends and fashions.				
6	Just as the Bible says, the world literally was created in six days.				
7	I like being in charge of a group.				
8	I like to learn about art, culture, and history.				
9	I often crave excitement.				
10	I am really interested in only a few things.				
11	I would rather make something than buy it.				
12	I dress more fashionably than most people.				
13	The federal government should encourage prayers in public schools.				
14	I have more ability than most people.				
15	I consider myself an intellectual.				
16	I must admit that I like to show off.				
17	I like trying new things.				
18	I am very interested in how mechanical things, such as engines, work.				
19	I like to dress in the latest fashions.				
20	There is too much sex on television today.				
21	I like to lead others.				
22	I would like to spend a year or more in a foreign country.				
23	I like a lot of excitement in my life.				
24	I must admit that my interests are somewhat narrow and limited.				
25	I like making things of wood, metal, or other such material.				
26	I want to be considered fashionable.				
27	A woman's life is fulfilled only if she can provide a happy home for her family.				
28	I like the challenge of doing something I have never done before.				
29	I like to learn about things even if they may never be of any use to me.				
30	I like to make things with my hands.				
31	I am always looking for a thrill.				
32	I like doing things that are new and different.				
33	I like to look through hardware or automotive stores.				
34	I like my life to be pretty much the same from week to week.				

B. INVESTMENT PATTERN

- a. Your Preferred Investment and Percentage of Investment
(Take five irrespective of percentage of investment)

Sr	Investment	R	09-10	10-11	Sr	Investment	R	09-10	10-11
	LESS RISK INVOLVED								
1	NSC				2	Bank Deposits			
3	PPF				4	Insurance			
5	PO Schemes				6	Gold			
7	Mutual Funds				8	ELSS			
9	Credit Society				10	Debt Instruments			
	RISK INVOLVED								
11	Company Deposits				12	NBFC Schemes			
13	Shares				14	Real Estate			
15	Precious Stones				16	Art Objects			
17	Personal Lending				18	Systematic Investment Plan			
19	Pigmi				20	ULIP			
21	Deposits with Savkar				22	Any Other			

- b. What are your objectives behind investment?
(Take preferential order)

Sr	Inv. Objective	R	Sr	Inv. Objective	R
1	Retirement Planning		2	Tax Saving	
3	Health Insurance		4	Future Personal Obligation	
5	Future Dependent Obligation		6	Acquisition of Assets	
7	Acquisition of House Property		8	Source of income	
9	Working capital formation		10	Any other (Plz Specify)	

- c. If tax saving then preferred instruments.

Sr	Investment	R	Sr	Investment	R
A	NSC		B	Specified Mutual Funds	
C	PPF		D	Specified Bonds	
E	Life Insurance		F	Specified Infrastructure Bonds	
G	PLI		H	Mediclaim	
I	Bank FD		J	Any other (Plz Specify)	

d. What are guiding factors for your investment pattern? (Take preferential order)

Sr	Investment	R	Sr	Investment	R	Sr	Investment	R
1	Return		2	Risk		3	Time bound	
4	Safety		5	Tax Concession		6	Freebies	
7	Insurance Cover		8	Liquidity		9	Brand Name	
10	Past Performance		11	Portfolio		12	Recommendation	
13	Past Experience		14	Lucrative Schemes		15	Any other (Plz Specify)	

e. What are your known sources of information for investment and which of them are more reliable?

Sr No	Variables	Mostly agree	Somewhat agree	Neutral	Somewhat disagree	Mostly disagree
1	Govt. officials					
2	Bank officials					
3	Financial Advisors					
4	Consultants(CA/ Tax consultants)					
5	Television Ads, TV Programs					
6	Brokering Firms					
7	Friends/ relatives					
8	Newspaper Ads,					
9	Websites					
10	Hand Outs, Hoardings					
11	Newsletters, Bulk Mailing					
12	Seminar/ Lecture					
13	Coldcalls by financial advisors					
14	Journals					
15	Any other					

f. What are the variables that you would consider while selecting any financial company?

Sr No	Variables	Mostly agree	Somewhat agree	Neutral	Somewhat disagree	Mostly disagree
1	Trustworthy					
2	Financial Strength of promoters					
3	Usage of technology					
4	Reputation					
5	Innovatveness					
6	Products, flexibility & transparency					
7	Business Practices					
8	The Management team					
9	Range of services					
10	convenience					
11	Service orientation					
12	Customer interaction					
13	Channels availability					
14	Any other					

C. DEMOGRAPHIC PROFILE

Sr	Particulars		Sr	Particulars	
1	Name		2	Sex	
3	Address		4	Age	
5	Ph. No		6	Cell	
7	Educational Qualification		8	Occupation	
9	Spouse's educational Qualification		10	Spouse's educational Qualification	
11	Your Income (p.m.)		12	House hold income (H) p.m.	
13	Disposable income(p.m.)		14	Spouse's Occupation	
15	House Hold Expenditure		16	Dependent members in family	
17	Lifestyle Expenditure				
18	Decision maker about investment in family				
a.	Self		b.	Discuss with spouse	
c	Discuss with Friends		d	Discuss with consultants	
e	Discuss with family		e	Any other	
19	Expected rate of return		20	Preferred duration of Investment	