

# **APPENDICES**

**APPENDIX -I**  
**QUESTIONNARIE FOR CUSTOMERS**

**General Information**

1.Name of the customer : \_\_\_\_\_

2.Residential Address : \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Telephone No : \_\_\_\_\_

Mobile No. : \_\_\_\_\_ E-mail : \_\_\_\_\_

1) Gender:-  
Male  Female

2) Age (in years)  
 Up to 30 years-Y1  31-45 years -Y2  46-60 years -Y3  Above 60-Y4

3) Educational Qualification:  
 Undergraduates  Graduates  Postgraduates  Professionals

4) Occupation:  
 Service  Businessman  Profession  Agriculture  Other

5) Annual Income of Family:-  
 Below 1Lac  1lac-3lac  3lacs-5lacs  above 5 lacs

6) Which type of MF do you own sector wise?

Public sector funds       Private SF       Both

A) Nature wise

Open ended       Close ended

B) Type wise

Equity       Debt  
 Balanced       Blue chip

7) Out of the following which service you are aware which are provided after investing in Mutual Funds?

E-Mail Alert       SMS Alert       Correspondence  
 24 Hr Toll Free No.       Personal Assistance

8) Do you know that MF industry is regulated by SEBI?

Yes       No

9) Out of the following in which Mutual Fund you have invested?

UTI MF       RELIANCE MF       Birla Sun life MF  
 HDFC MF       SBI MF       ICICI MF  
 LIC MF       Kotak Mahindra MF       Tata AIG mutual fund.  
 ING Vyasa MF       Any other

10) Do you know that MF is related to share market?

Yes  No

11) How much amount do you invest in particular investment avenue?

Less than Rs.5000  Between Rs.5000-10,000

Between 11,000-21,000  More than 21,000

Regarding your earlier experience with the mutual fund investment, please indicate your degree of agreement with the following statements. '1' means you strongly agree with the statement, while '5' means you strongly Disagree with the statement. We are interested in the number that best describes your satisfaction.

<b>Strongly Agree</b>	<b>Agree</b>	<b>Neutral</b>	<b>Disagree</b>	<b>Strongly Disagree</b>
<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>

<b>Sr.no.</b>	<b>Statement</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
1.	Main objective behind Mutual fund investment is tax saving.					
2	Friends/Relatives is a general source of awareness					
3	People prefer SIP investment of Mutual funds					
4	SIP is a systematic investment					
5	SIP gives options of flexibility for investment					
6	Investors prefer long term investment					
7	Mutual fund investment is long term investment.					
	Mutual funds are complex and difficult to understand.					
	MF investment is for high returns and less risk.					
	Past Performance of MF is most important criterion for selecting particular MF.					
	Diversified investment increases average rate of return					
	Your satisfaction from your MF is good					
	Mutual Funds give no assurance of fixed returns.					
	Investors rely on information given by friends/Relatives					

Thanking you