

ANNEXURES

Schedule

A. Demographic Information:-

1.	Name-		
2.	Gender- Male/Female	3. Martial Status-	
4.	Age- yrs	5. Educational Qualification-	
6.	Address-		
7.	Occupation- a. Business b. Salaried Person c. Professional		
8.	Nature of Occupation-		
9.	No. of dependants		
10.	Total Annual Income-Rs.		11. Total Household Income-Rs.
12.	Your Annual Savings- a. Less than Rs.50000 b. Rs.50001-100000 c. More than Rs.100000		

B. Your preferred investments: - (Please tick in relevant column to indicate preference)

Sr	Investment Avenues	Mostly Preferred	Preferred	Somewhat Preferred	Not very preferred	Not at all preferred
1.	Gold/Silver					
2.	Bank deposits					
3.	NSC					
4.	Post Office Schemes					
5.	Govt. Securities					
6.	Provident Fund					
7.	PPF					
8.	Pension Fund					
9.	Life Insurance					
10.	Health Insurance					
11.	Debentures/Bonds					
12.	Mutual Funds					
13.	ULIP					
14.	Shares					
15.	Real Estate					
16.	Commodities					
17.	Derivatives					
18.	Pigmy/credit society deposits					
19.	Chit Fund					

C. Your objectives behind investment decisions: - (Give Ranks.....1 for most preferred followed by 2,3..... One rank can be assigned only once)

Sr	Objectives	Rank	Sr	Objectives	Rank
1.	Retirement planning		7.	Education of children	
2.	For business expansion		8.	Insurance (life cover & health)	
3.	Working Capital needs		9.	Parental obligations	
4.	Tax savings		10.	To beat inflation	
5.	Future Personal Obligations		11.	To meet contingencies	
6.	Acquisition of house				

D. Indicate Your proportion of investment (% of total investment) on basis of time horizon:-

Sr No.	Investment Avenues	Short term Percentage (upto 1yr)	Medium term Percentage (1 to 5yrs)	Long Term Percentage (Above 5 yrs)
		a	b	c
1.	Gold/Silver			
2.	Bank deposits			
3.	NSC			
4.	Post Office Schemes			
5.	Govt. Securities			
6.	Provident Fund			
7.	PPF			
8.	Pension Fund			
9.	Life Insurance			
10.	Health Insurance			
11.	Debentures/Bonds			
12.	Mutual Funds			
13.	ULIP			
14.	Shares			
15.	Real Estate			
16.	Commodities			
17.	Derivatives			
18.	Pigmy/credit society deposits			
19.	Chit Fund			

E. Indicate your agreeableness on following statements by ticking the relevant column:-

Sr	Statements	Mostly Agree	Somewhat Agree	Neither Agree or Disagree	Somewhat disagree	Mostly disagree
1.	I do consider the fundamental analysis or past evaluation of investments.					
2.	It is important for me to buy the best rated investments.					
3.	If I am in good mood I invest without conducting proper analysis.					
4.	I have greater level of information/knowledge which leads to accurate investment decisions.					
5.	I assign different investments avenues to satisfy different different objectives.					
6.	I would sell out the investments earning higher returns.					
7.	I am emotionally attached to the investments which are inherited from my parents.					
8.	Information from newspaper/media/websites helps me in making right investment choice.					
9.	I like to buy the past winners as they are representatives of future trend.					
10.	Investment in familiar avenues helps to secure my future.					
11.	I do regret on decision taken in optimism in future.					
12.	I am more accurate in investment decisions than my spouse/opposite gender.					
13.	Maintaining different accounts helps me achieving my financial objectives					
14.	I would hold those investments whose value is decreasing.					
15.	I won't sell out investments which is an ancestral property.					
16.	I do follow my friends and relatives investment choices.					
17.	Investment in blue chip companies is always profitable.					
18.	Regular watch is not needed for familiar investments.					
19.	When I am in a bad mood I am more cautious about investment decisions..					
20.	I am one time shopper.					
21.	Different accounts helps me in maintaining portfolio risk					
22.	I am equally concerned about gaining and losing value of investments.					
23.	I would hold investments gifted by my friends/spouse/family.					
24.	I do take professional advice from consultant before making investment decisions.					

F. Indicate your attitude towards following statements by ticking the relevant columns

Sr no.	Questions	No or doesn't apply	Slightly	Quite a bit	Very much
1.	Are you good at planning				
2.	Are you a hardworking person				
3.	Do you find mathematics interesting				
4.	Is the increase in wealth is important to you				
5.	Do you ever feel lucky				
6.	Can you be decisive				
7.	Are you a saver who hates to part with investments				
8.	Do you commit heavily to what you do				
9.	Are you a friendly person				
10.	Do you ever do something without giving it much thought				
11.	Are you interested in facts				
12.	Are you good at dealing with money matters				
13.	Are you controlling of situations				
14.	Do you ever get nervous, stressed or upset				
15.	Do you like modern appliances				
16.	Do you tend to believe what people tell you				
17.	Are you a patient person				
18.	Do you like computers				
19.	Do you ever take risks in anything you do(sports,friendships, etc)				
20.	Are you mechanically minded and able to fix things				
21.	Are you hard to influence				
22.	Do you prefer staying in with a good book to socializing				
23.	Do you prefer short rapid tasks to longer ones				
24.	Are you irritated by people who talk a lot but do little				
25.	Are you a family person				
26.	Do you like to take a chance/risk (gamble)				
27.	Do you find there are too few hours in the day				
28.	Do you finish whichever tasks you start				
29.	Do you ever forget things				
30.	Do you have a good income				

G. Indicate your agreeableness towards the statements by ticking the relevant columns

Sr no.	Particulars	Highly disagree	Slightly disagree	Makes no difference	Slightly Agree	Highly Agree
1.	Personal wealth is not an issue and financial loss doesn't keep me awake at night					
2.	I'd rather be in one investment with the chance of a higher return than in a broad selection with less chance					
3.	If the market is unstable, it's not a worry-I'll still trade					
4.	I'm willing to take as much time as I need to keep eye on my investments					
5.	I enjoy the excitement of investment trading					
6.	Price swings in investment I own are of little concern					
7.	I don't need a steady dividend income and would rather have capital growth					
8.	It doesn't bother me that my investments are not easily tradable					
9.	Investments in emerging markets or high tech research is more appealing to me than traditional blue chips					
10.	I don't feel the need to check my portfolio frequently and can leave it alone for long periods					

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