

## RuppeeCoin PMS Risk Profiler

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For Clients Investing in Portfolio Management Services (PMS)

### Instructions

Please choose one option per question. Each option carries a score from 1 (low risk) to 4 (high risk). Total score will guide us to suggest the most appropriate PMS strategy for you.

### ☐ SECTION A: Financial Profile

1. What is your investable amount for PMS?

- ☐ ₹50L – ₹1 Cr (1)
- ☐ ₹1 Cr – ₹2 Cr (2)
- ☐ ₹2 Cr – ₹5 Cr (3)
- ☐ Above ₹5 Cr (4)

2. What is your primary investment goal?

- ☐ Capital protection (1)
- ☐ Steady growth (2)
- ☐ Wealth creation (3)
- ☐ High returns & growth (4)

3. What is your investment horizon in PMS?

- ☐ Less than 3 years (1)
- ☐ 3 – 5 years (2)
- ☐ 5 – 7 years (3)
- ☐ More than 7 years (4)

### ☐ SECTION B: Investment Experience

4. How experienced are you with equity investments?

- ☐ No experience (1)
- ☐ Limited (2)
- ☐ Moderate (3)
- ☐ Extensive (4)

5. How do you react to a 15–20% market correction?

- ☐ Very uncomfortable (1)
- ☐ Somewhat concerned (2)
- ☐ Neutral (3)
- ☐ See it as an opportunity (4)

☒ SECTION C: Risk Attitude

6. What type of PMS portfolio do you prefer?

- ☐ Capital protection (1)
- ☐ Balanced growth (2)
- ☐ Aggressive growth (3)
- ☐ High alpha concentration (4)

7. Do you accept volatility for higher returns?

- ☐ No (1)
- ☐ Somewhat (2)
- ☐ Yes (3)
- ☐ Strongly agree (4)

8. How frequently do you track your investments?

- ☐ Rarely (1)
- ☐ Monthly (2)

- Weekly (3)
- Daily (4)

#### SECTION D: Liquidity & Flexibility

9. How important is liquidity for you?

- Very important (1)
- Moderately important (2)
- Can compromise (3)
- Not a concern (4)

10. Would you remain invested during a drawdown of 20–25%?

- Exit (1)
- Reduce (2)
- Hold (3)
- Invest more (4)

#### Scoring Guide & Suggested PMS Strategy

Score Range	Risk Profile	Recommended PMS Strategy
10 – 18	Conservative	Large-cap PMS, capital protection-oriented, low volatility portfolios
19 – 27	Moderate	Balanced PMS with diversified exposure to blue-chip and growth-oriented stocks
28 – 34	Aggressive	Alpha-focused PMS, mid/small-cap weighted with sector rotation and high growth ambitions
35 – 40	Very Aggressive	High-conviction, thematic and concentrated PMS strategies with higher risk-reward outlook