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## **❑ Stock Broking Risk Profiler**

**RuppeeCoin – Aapka Nivesh Saarthi**

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### **Section A: Personal & Financial Background**

#### **1. What is your primary reason to invest in stocks?**

- ☐ Capital safety
- ☐ Steady returns
- ☐ Wealth creation
- ☐ Quick profits

#### **2. What is your monthly investible surplus?**

- ☐ Less than ₹10,000
- ☐ ₹10,000 – ₹25,000
- ☐ ₹25,000 – ₹50,000
- ☐ More than ₹50,000

#### **3. What is your investment horizon in equity?**

- ☐ Less than 1 year
  - ☐ 1–3 years
  - ☐ 3–5 years
  - ☐ More than 5 years
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### **Section B: Market Awareness & Experience**

#### **4. How would you describe your knowledge of stock markets?**

- ☐ Beginner
- ☐ Somewhat aware
- ☐ Well-informed
- ☐ Advanced

#### **5. What has been your experience with stock investments?**

- ☐ No experience
  - ☐ Limited gains/losses
  - ☐ Good returns
  - ☐ High returns and losses
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## **□ Section C: Behavioural Patterns**

### **6. How do you typically react to market volatility?**

- ☐ Exit quickly
- ☐ Wait it out
- ☐ Buy more
- ☐ Stay aggressive

### **7. Do you track your investments regularly?**

- ☐ Rarely
  - ☐ Monthly
  - ☐ Weekly
  - ☐ Daily
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## **🔒 Section D: Risk Appetite**

### **8. If your stock portfolio drops by 20% in a month, what would you do?**

- ☐ Sell all
- ☐ Reduce exposure
- ☐ Hold patiently
- ☐ Buy more

### **9. What level of daily fluctuation are you comfortable with?**

- ☐ Less than 1%
- ☐ 1–2%
- ☐ 2–5%
- ☐ More than 5%

### **10. Would you consider using leverage/margin?**

- ☐ Never
  - ☐ Rarely
  - ☐ Sometimes
  - ☐ Often
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## **✓ Scoring Guide**

Each answer:

- Option 1 → 1 point
- Option 2 → 2 points


- Option 3 → 3 points
- Option 4 → 4 points

**Total Score (out of 40):** \_\_\_\_\_

Score Range	Risk Profile	Recommended Strategy
10 – 18	<input type="checkbox"/> Conservative	Blue-chip stocks, ETFs, dividend-focused portfolios
19 – 27	<input type="checkbox"/> Moderate	Large/Mid-cap, diversified portfolios, some sector exposure
28 – 34	<input type="checkbox"/> Aggressive	Mid-cap, thematic ideas, small cap allocation
35 – 40	<input checked="" type="radio"/> Very Aggressive	IPOs, leverage trading, intraday, high beta stocks

## Contact

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## **Recommended Trading Types & Segments by Risk Profile**

Risk Profile	Ideal Trading Types	Suitable Market Segments
<input type="checkbox"/> <b>Conservative</b>	Delivery-based investing, SIP in stocks, ETFs	Nifty 50 stocks, ETFs, large-cap equity, PSU blue-chips
<input type="checkbox"/> <b>Moderate</b>	Swing trading, short-term delivery, covered calls (F&O light)	Large & mid-cap stocks, Nifty Next 50, select sectors (FMCG, Banking)
<input type="checkbox"/> <b>Aggressive</b>	Position trading, sector rotation, thematic investing	Mid-cap, small-cap, thematic sectors (EV, Pharma, Infra), selective IPOs
<input checked="" type="radio"/> <b>Very Aggressive</b>	Intraday trading, momentum trades, options/F&O strategies	High beta stocks, small-cap, penny stocks, leverage via margin/derivatives

### □ Additional Matching Strategies:

Profile	Risk Management Approach	Research Focus
Conservative	Stop-loss discipline, long-term holdings	Fundamental strength, dividends
Moderate	Balanced portfolio, risk-adjusted entries/exits	Mix of technical & fundamental
Aggressive	Thematic bets, sector timing, breakout trading	Technical charts, volume patterns
Very Aggressive	Scalping, option writing, high volatility plays	Real-time data, news-based momentum