

## TO BE FILLED BY INVESTOR

Help us understand your needs better. Kindly fill the form below to give you a customized solution for your investment goals. Circle the below responses as per your choices:

|                |  |
|----------------|--|
| Name:          |  |
| Portfolio No.: |  |

Already Provided:  No change in previous details

|              |                                      |                                   |                                   |                                      |
|--------------|--------------------------------------|-----------------------------------|-----------------------------------|--------------------------------------|
| Age (in yrs) | <input type="checkbox"/> 1. Above 60 | <input type="checkbox"/> 2. 50-60 | <input type="checkbox"/> 3. 40-50 | <input type="checkbox"/> 4. Below 40 |
|--------------|--------------------------------------|-----------------------------------|-----------------------------------|--------------------------------------|

| Risk-Return Tolerance Level |                                |
|-----------------------------|--------------------------------|
| <input type="checkbox"/>    | 1. Lower Risk, Lower Returns   |
| <input type="checkbox"/>    | 4. Medium Risk, Medium Returns |
| <input type="checkbox"/>    | 8. Higher Risk, Higher Returns |

| Monthly Saving           |                            |
|--------------------------|----------------------------|
| <input type="checkbox"/> | 2. Rs. 1,000 - Rs. 25,000  |
| <input type="checkbox"/> | 3. Rs. 25,000 - Rs. 50,000 |
| <input type="checkbox"/> | 4. Above Rs. 50,000        |

| Occupation               |                           |
|--------------------------|---------------------------|
| <input type="checkbox"/> | 1. Retired                |
| <input type="checkbox"/> | 2. Housewife/Student      |
| <input type="checkbox"/> | 3. Salaried               |
| <input type="checkbox"/> | 4. Business/Self Employed |

| Investment Objective     |   |
|--------------------------|---|
| <input type="checkbox"/> | 2. Cash Management                            |
| <input type="checkbox"/> | 4. Monthly Income                             |
| <input type="checkbox"/> | 8. Capital Growth/Long Term Saving/Retirement |

| Your Level of Knowledge of Investments and Financial Markets? |                          |
|---|--------------------------|
| <input type="checkbox"/>                                      | 2. Limited/Basic/Average |
| <input type="checkbox"/>                                      | 3. Good/Excellent        |

| Investment Horizon       |                       |
|--------------------------|-----------------------|
| <input type="checkbox"/> | 2. Less than 6 months |
| <input type="checkbox"/> | 4. 6 months to 1 year |
| <input type="checkbox"/> | 6. 1 year to 3 years  |
| <input type="checkbox"/> | 8. More than 3 years  |

Now, please add the scores corresponding to your selected choices & calculate in the below table to find your ideal investment fund.

|                                       | Scores | Investor Portfolio | Funds        |
|---------------------------------------|--------|--------------------|--------------|
| <b>Calculate your Ideal Portfolio</b> | 33-39  | Aggressive         | Equity       |
|                                       | 24-32  | Balance            | Balanced     |
|                                       | 15-23  | Stable             | Income       |
|                                       | 11-14  | Conservative       | Money Market |

### NOTE:

I/We hereby confirm that all information provided in this form is true and correct to the best of my/our knowledge. I/We also confirm having read and understood the Trust Deeds, Offering Documents, Supplemental Offering Documents that govern the transactions and further acknowledge understanding of the risks involved in Mutual Funds. Further, I/We declare to have understood and completed this entire Risk/Return Profiling Questionnaire.

I/We understand and agree that as per my/our Risk level, Pak-Qatar Asset Management Company Limited has suggested the above fund category to me/us but I/we can/may invest in any other fund category as per my/our discretion.

\_\_\_\_\_  
Signature of Principal / Joint Account Holder(s)

|                                  |                             |
|----------------------------------|-----------------------------|
| <b>Name of Sales Person</b>      | <b>Name of Manager</b>      |
| <b>Signature of Sales Person</b> | <b>Signature of Manager</b> |