

Risk Profile Form

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
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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
Calculate your Ideal Portfolio	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)

Name of Sales Person	Name of Manager
Signature of Sales Person	Signature of Manager