



Risk Analysis Form

- I) Full Name: -----
- II) What is your Age Group? : -----
- III) Current Investment Amount? : -----
- IV) Preferred Investment type? : -----
- V) Gross Annual Income details? : -----
- VI) What is your experience with equity investments? : ----- year
- VII) What is your experience with Commodity investments? : ----- year
- VIII) What is your experience with Forex investments? : -----year
- XI) What is your experience with investments in past? : ----- year
- X) Sources of Income? : -----
- XI) Investment Goal? : -----
- XII) Market Value of portfolio held? : -----
- XIII) Investment Experience? : ----- year
- XVI) Experience in market products? : -----
- XV) What is the size of your emergency fund? -----
- XVI) What is your preference W.R.T securities with low risk, low return over high risk, high return? : ----- (Strongly prefer / Prefer / Do not prefer/ Strongly do not prefer)
- XVII) When market is not performing well do you prefer to buy risky investments and sell less risky investments? : -----

XVIII) Risk Tolerance Ratio? : ----- (High/meium/low)

**XIX) What percentage of monthly income is allocated to pay off debt [all EMIs]? : -----
-----**

XX) Occupation (please select the appropriate)? : -----

Name Of Company: -----

**Any specific commodities or shares in which you have experience and are willing to trade, if
yes Name of the securities: -----**

Clients with Long term Investment goal or capital appreciation as investment objectives are not
accepted at **GOLD CRUDE RESEARCH.**

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