



RISK PROFILE FORM

Life ko Plan karo...
Aaj se!

To be filled by Investors

AMIM-01-2020

Pure. Profit.

Name	
Portfolio No.	

Help us understand your financial 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:

Age(in yrs):	<input type="radio"/> 1. Above 60	<input type="radio"/> 2. 50-60	<input type="radio"/> 3. 40-50	<input type="radio"/> 4. Below 40
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Risk- Return Tolerance Level

1. Lower Risk, Lower Returns

4. Medium Risk, Medium Returns

8. Higher Risk, Higher Returns

Monthly Savings:

2. Rs. 25,000- Rs. 150,000

3. More than Rs. 150,000

Occupation:

1. Retired

2. Housewife/ Student

3. Salaried

4. Business/ Self-employed

Investment Objective:

2. Cash Management

4. Monthly Income

8. Capital Growth/ Long Term Savings/ Retirement

Your level of knowledge of Investments and Financial markets?

2. Limited/Basic/Average

3. Good/Excellent

Investment Horizon:

2. Less than 6 months

4. Less than 1 year

6. 2- 3 years

8. More than 3 years

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

	Scores	Investor Portfolio	Fund
Calculate your Ideal Portfolio	33-38	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 Trust Deeds, and 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 Profile Al Meezan Investments has Suggested me/us above fund category but I/we can/may invest in any other fund category as per my/our discretion.

نوٹ: میں اس بات کو سمجھتا/سمجھتی ہوں اور متفق ہوں کہ المیز ان نے مندرجہ بالا فنڈ کیٹیگری میری رسک پروفائل کے مطابق تجویز کی ہے۔ لیکن میں اپنی مرضی کے مطابق کسی بھی دوسری فنڈ کیٹیگری میں انویسٹمنٹ کر سکتا/کر سکتی ہوں۔

Signature of Principal / Joint Account Holder(s)

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