**ClientName–**

|  |  |
| --- | --- |
| **Would you invest where a small return is earned associated with small risk instead of a high return associated with high risk?** | **Direct Questions to ascertain risk appetite** |
|  | 0 |
|  | 5 |
|  | 10 |
|  | 15 |
|  | 20 |
| **When market is not performing well would you like to invest in more risky investment instead of less risky investment to earn high return?** | **Direct Questions to ascertain risk appetite** |
|  | 20 |
|  | 15 |
|  | 10 |
|  | 5 |
|  | 0 |
| **High risk is associated with high return, Medium risk Is associated with medium returns and low risk is associated with low returns? What risks can you bear (not prefer)?** | **Direct Questions to ascertain risk appetite** |
|  | 20 |
|  | 10 |
|  | 0 |
| **What is the duration of investment you are looking forward to keep invested?** | |
|  | 5 |
|  | 0 |
|  | 10 |
| **In which of the following market segments have you traded previously?** | **For Selection of product** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
| **What is your experience with equity investments?** | **For selection of product** |
|  |  |
|  |  |
|  |  |
|  |  |
| **What is your experience with Commodity investments?** | **For selection of product** |
|  |  |
|  |  |
|  |  |
|  |  |
| **What is your experience with Forex investments?** | **For selection of product** |
|  |  |
|  |  |
|  |  |
|  |  |
| **What is your Age Group?** | **Weight Allotted** |
|  | 20 |
|  | 15 |
|  | 10 |
|  | 5 |
|  | 0 |
| **Investment Goal** |  |
|  | 0 |
|  | 20 |
|  | 10 |
| **Proposed Investment Amount** |  |
|  | 0 |
|  | 5 |
|  | 10 |
|  | 15 |
| **Gross Annual Income details:-** |  |
|  | 0 |
|  | 5 |
|  | 10 |
|  | 15 |
|  | **20** |
| **Sources of Income** |  |
| **A.     Primary Source** |  |
|  |  |
|  |  |
| **B.      Secondary Source** |  |
|  |  |
|  |  |
|  |  |
| **Specify\_\_\_\_\_\_\_\_** |  |
| **Market Value of portfolio held** |  |
|  | 5 |
|  | 10 |
|  | 15 |
|  | 20 |
| **Investment Experience** |  |
|  | 0 |
|  | 5 |
|  | 10 |
| **How many dependents do you financially support?** |  |
|  | 10 |
|  | 5 |
|  | 0 |
| **What is the size of your emergency fund?** |  |
|  | 0 |
|  | 0 |
|  | 5 |
|  | 10 |
|  | 15 |
| **What is your experience with investments in past?** |  |
|  | 20 |
|  | 15 |
|  | 10 |
|  | 5 |
|  | 0 |
| **What percentage of monthly income is allocated to pay off debt [all EMIs]?** | |
|  | 20 |
|  | 15 |
|  | 10 |
|  | 5 |
|  | 0 |
| **Occupation (please select the appropriate)** |  |
|  |  |
|  |  |
|  |  |
|  | |
|  |  |
|  |  |
| **Are you any of the following, or are directly or indirectly related to any of the following** | |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  | |

The maximum total is 240, if client scores between 51-150, he is a medium risk appetite client and if scores above 150 he is high risk appetite client

**Risk Based Classification of the Services**

|  |  |
| --- | --- |
| **Medium** | |
| CASH INTRADY CALL | |
| BTST CASH | |
| DELIVERY CALLS | |
| CASH WINNING CALLS | |
| **High** |  |
| CASH HNI CALLS | COMMODITY HNI |
| CASH PACK HNI PLATINUM | COMMODITY  BULLION |
| INTRADAY FUTURE | COMMODITY   AGRI |
| HNI FUTURE | BASE METAL + ENERGY |
| FUTURE POSITIONAL | MCX WINNIG CALLS |
| INDEX FUTURE | AGRI HNI |
| FUTURE WINNIG CALLS | CURRENCY |
| FUTURE BTST/STBT | CURRENCY PREMIUM |
| FUTURE PACK HNI PLATINUM | COMEX |
| INDEX FUTURE PREMIUM | COMBO(CASH+FUTURE) |
| OPTION CALL & PUT | MCX+CASH |
| NIFTY OPTION | BULLION + METAL + ENERGY |
| HNI OPTION | STOCK + NIFTY + OPTION |
| OPTION BTST | COMBO (OPTION + FUTURE) |
| OPTIONAL POSITIONAL | INVENTORY CALL’S (CRUDE OIL & N.G.) |
| INDEX OPTION PREMIUM |  |
| EDGE WINNIG CALLS |  |

Terms & Conditions:-

**• Risk Profiling Form comprises of 6 pages which must be acknowledged by client.  
  
• Clients have to compulsorily answer all the questions. In case of any doubt, you can coordinate with your executive.  
  
• Clients have to update total scores (based on all questions) along with the product taken (Service Name) at the last page (Duly signed by  
client).  
  
• IMMORTAL RESEARCH does not provide any kind of guarantee or assurance of profit.  
  
• Investment in NSE Cash /NSE F&O/MCX /NCDEX/MCFX-SX or NSE CDS Market is subject to market risk.  
  
• Immortal Research strictly follows Trading Principle and Stop Loss Policy wherein Customer by default agree to not do/enter any trade  
without Pre Informed/defined Stop Loss.  
  
• All sales are final. Because Immortal Research offers a free 2 days evaluation to ensure that our products and services will meet your  
needs without the need to purchase, there will be ABSOLUTELY NO REFUNDS and CANCELLATIONS. We do not offer refunds on subscriptions  
that have already been taken. We believe in our services and support provided to Our Clients.  
  
• By making a payment for Membership to our site, you acknowledge that you have read and agree to the No Refund and No Cancellation  
Policy.  
  
• If client claims regarding the payment then company is not responsible for it.**