# QUESTIONNAIRE

## A study of preferences of the investors for investment in mutual funds.

**1. What kind of investments you prefer most? Pl tick (√). All applicable**

| | | | |
|---|---|---|---|
| a. Saving account | b. Fixed deposits | c. Insurance | d. Mutual Fund |
| e. Post Office-NSC, etc | f. Shares/Debentures | g. Gold/ Silver | h. Real Estate |
| I. PPF | j. PF | | |

**2. While investing your money, which factor you prefermost? Any one**

| | | | |
|---|---|---|---|
| Liquidity | Low Risk | High Return | Company reputation |

**3. Have you ever invested your money in mutual fund?**

| | |
|---|---|
| Yes | No |

**If yes,**

**a) Where do you find yourself as a mutual fund investor?**

Totally ignorant [ ]

Partial knowledge of mutual funds [ ]

Aware only of any specific scheme in which you invested [ ]

Fully aware [ ]

**b) In which kind of mutual you would like to invest?**

Public [ ] Private [ ]

**c) how do you come to know about Mutual Fund?**

| | | | |
|---|---|---|---|
| a. Advertisement | b. Peer Group | c. Banks | d. Financial Advisors |

**d) Which mutual fund scheme have you used?**

| | |
|---|---|
| Open-ended | Close-ended |
| Liquid fund | Mid- Cap |
| Growth fund | Regular Income fund |
| Long-Cap | Sector fund |

**If no,**

a) **If not invested in Mutual Fund then why?**

| | | |
|---|---|---|
| Not aware of MF | Higher risk | Not any specific reason |

**4. which feature of the mutual funds allure you most?**

Diversification [ ]

Better return and safety [ ]

Reduction in risk and transaction cost [ ]

Regular Income [ ]

Tax benefit [ ]

**5. In which Mutual Fund you have invested? Please tick (√). All applicable.**

| | |
|---|---|
| a. SBIMF | |
| b. UTI | |
| c. HDFC | |
| d. Reliance | |
| e. ICICI prudential funds | |
| f. JM mutual fund | |
| g. Other. Specify | |

**6. When you invest in Mutual Funds which mode of investment will you prefer?**

| | |
|---|---|
| a. One Time Investment | b. Systematic Investment Plan (SIP) |

**7. Where from you purchase mutual funds?**

Directly from the AMCs [ ]

Brokers only [ ]

Brokers/ sub-brokers [ ]

Other sources [ ]

**8. Which AMC will you prefer to invest?**

| | |
|---|---|
| Assets Management Co. | |
| a. SBIMF | |
| b. UTI | |
| c. Reliance | |
| d. HDFC | |
| e. Kotak | |
| f. ICICI | |
| g. JM finance | |

**9. Which sector are you investing in mutual fund sector?**

| | | |
|---|---|---|
| i. | General 1st | |
| ii. | Oil and petroleum | |
| iii. | Gold fund | |
| iv. | Diversified equity fund | |
| v. | Power sector | |
| vi. | Debt fund | |
| vii. | Banking fund | |
| viii. | Real estate fund | |
| ix. | General 1st | |

**10. How would you like to receive the returns every year?**

| | | |
|---|---|---|
| a. Dividend payout | b. Dividend re-investment | c. Growth in NAV |

11. **Personal Details:**

(a). Name:-

(b). Add: - Contact No:-

(c). Age:-

(d). Qualification:-

| Graduation/PG | Under Graduate | Others |
|---|---|---|
| | | |

(e). Occupation. Pl tick (√)

| Govt. Sec | Pvt. Sec | Business | Agriculture | Others |
|---|---|---|---|---|
| | | | | |

(g). What is your monthly family income approximately? Pl tick (√).

| | | | | |
|---|---|---|---|---|
| Up to Rs.10,000 | Rs. 10,001 to 15000 | Rs. 15,001 to 20,000 | Rs. 20,001 to 30,000 | Rs. 30,001 and above |