QUESTIONNAIRE

Asset Management In Mutual Fund In India

(A Case Study On HDFC Mutual Fund)

1. What is your occupation –
A) Government service
B) Banking service
C) Professional service
D) Business
2. What is your annual income?
   A) Up to 50,000
   B) More than 50,000 up to 75,000
   C) More than 75,000 up to 1,00,000
   D) More than 1,00,000 up to 1,25,000
   E) Above Rs. 1,25,000
   F) Other (specify)

3. Are you investing?
   A) Yes B) NO

4. What Kinds Of Investment You Prefer Most?
   A) Saving Account
   B) Fixed Deposit
   C) Insurance
   D) Mutual Fund
   E) Share / Debenture
   F) Gold / Silver
   G) Real Estate
   H) PF

5. While investing your money, which factor you prefer most?
   A) Liquidity
   B) Low Risk
   C) High Return
   D) Company Reputation

6. Have you ever invested your money in mutual fund?
   B) Yes B) No

IF YOU HAVE INVESTED IN MUTUAL FUND THAN ANSWER THE FOLLOWING QUESTIONS-

7. If Yes, Where do you find yourself as a Mutual Fund investor?
   A) Totally ignorant
   B) Partial knowledge of mutual fund
   C) Aware only of any specific scheme in which you invested
   D) Fully aware

8. If yes, when did you know about the mutual funds?
   A) Recently
   B) 2 years back
   C) 4 years back
   D) much before
9. What was the sources of information for you?
   A) Newspaper – magazines – brochures
   B) Agent / bank
   C) Friends relatives
   D) Financial advisors

10. In which kind of mutual fund you would like to invest?
    A) Public
    B) Private

11. Which type of mutual fund did you invest in?
    A) Open – ended
    B) Closed – ended
    C) Both
    D) Don’t know

12. Which Feature Of The Mutual Fund You Prefer Most?
    A) Diversification
    B) Better Return And Safety
    C) Regular Income
    D) Tax Benefit

13. In Which Mutual Fund You Have Invested?
    A) HDFC MF
    B) ICICI Prudential Fund
    C) Reliance MF
    D) UTI MF
    E) SBI MF
    F) TATA MF

14. By how much you have invested in total mutual funds?
    A) Upto Rs. 5,000
    B) More than Rs. 5,000 Upto Rs. 20,000
    C) More than Rs. 20,000 Upto Rs. 50,000
    D) Above Rs. 50,000

15. What the important aspects of mutual funds in India?
    A) Income
    B) Tax
    C) Growth
    D) Service
    E) All of them
16. What is your pattern of investment in the different mutual funds schemes?
A) Growth scheme alone
B) Income scheme alone
C) Tax saving scheme alone
D) Money market scheme
E) Growth and income schemes
F) Growth and tax saving schemes
G) Growth, income and tax saving and money market schemes

17. Do you update yourself on the performance of the scheme on a regular basis?
A) Yes  B) No

18. When you invest in a scheme depending upon the investment objective and risk?
A) Yes  B) No

19. Which types of risk, you feel in mutual funds?
A) Lower return
B) Inaccessibility
C) Market conditions
D) Low liquidity
E) Others

20. When you invest in Mutual Fund which mode of investment will you prefer?
A). One Time Investment
B). Systematic Investment Plan (SIP)

21. If yes, what do you know about the time of invest in SIP?
A) Monthly  B) 6 month
C) 12 month  D) None of these

22. Do you know about an organization where investors are complaint against mutual funds?
A) Consumer court
23. Do you know about the entry-load or exit-load in mutual funds?
   A) Yes  B) No

24. What the return you receive at present in mutual funds?
   A) Positive  B) Negative

25. What types of benefits you needs by your investment in mutual funds?
   A) Tax benefits  B) High return
   C) Low risks  D) Growth opportunities

26. Where from you purchase Mutual Fund?
   A) Direct from the amcs  C) Brokers only
   B) Brokers / Sub-brokers  D) Others sources

27. Which AMC will you prefer to invest? Asset Management Co.:-
   A) HDFC MF  B) SBI MF
   C) UTI MF  D) ICICI MF
   E) Kotak MF  F) Reliance

**IF YOU HAVE NOT INVESTED IN MUTUAL FUND –**

28. If not invested in Mutual Fund then why?
   A) Not aware of MF  B) Higher risk
   C) Inaccessibility  D) Not any specific reason

29. Are you aware of mutual fund as an investment scheme?
   A) Yes  B) No

30. Will you interested in future investing in mutual funds?
   A) Yes  B) No
31. If yes, what is your preference of investment of your ranking first?
A) Bank deposits
B) GPF
C) LIC
D) Corporate securities
E) Mutual funds
F) UTI schemes