APPENDIX – I

Questionnaire

This questionnaire is part of my research. Request you to fill this questionnaire. The information disclosed, will be used purely for research purpose.

Name(Optional):
Gender:
Age:
Area: Area to which you belong : ( Rural / Semi Urban / Urban)
Occupation:
Educational Background: ( High School / Intermediate / Graduate / Post Graduate / Higher Degree)
Marital Status:

Kindly tick ()against the current option(Tick more than once where multiple option are applicable).

1) What is your annual income (Kindly mention “Y” against correct option)
   a) Less Than Rs 100000
   b) More than or equal to Rs 100001 or less than Rs 300000
   c) More than or equal to Rs 300000 or less than Rs 500000
   d) More than or equal to Rs 500000 or less than Rs 1000000
   e) More than or equal to Rs 1000000.

2) Do you invest your savings in any investment avenue : Yes / No

3) If ‘Yes’, what proportion of your income do you invest? _____%

4) For savings purpose which avenue you invest in
   a) Provident Fund
   b) Shares
   c) Mutual Fund
   d) Banks (Fixed Deposit etc)
   e) Others. Please mention ______________________________

5) What is the purpose of investment in mutual fund ( If investment done in MF)
   a) Return
   b) Tax Saving
   c) Low risk investment
   d) More attractive features compared to other investment avenues.
   e) Others ( Please specify): _________________________________________

6) Of the total savings what is the percentage of saving in mutual fund?
   a) Less than 1%
7) Which type of mutual fund schemes do you prefer the most? What proportion of your total investment in mutual funds have you invested in each type? (Rank the following in order of your preference and give reasons)

<table>
<thead>
<tr>
<th>%</th>
<th>Rank</th>
<th>Reason</th>
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</thead>
<tbody>
<tr>
<td>a) Income Schemes</td>
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<td>b) Growth Schemes</td>
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<td>c) Income cum growth Schemes</td>
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<td>d) Tax Planning Schemes</td>
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8) Of the total saving what was the percentage of saving in mutual fund during recession (October 2008 to March 2009)

<table>
<thead>
<tr>
<th>%</th>
<th>Rank</th>
<th>Reason</th>
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<tbody>
<tr>
<td>a) Less than 1%</td>
<td></td>
<td></td>
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<tr>
<td>b) More than 1% but less than 5%</td>
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<td></td>
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<tr>
<td>c) More than 5% but less than 10%</td>
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<td>d) More than 10% but less than 20%</td>
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<td>e) More than 20%</td>
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9) What factors did you consider while making a choice regarding the specific mutual fund you decided to invest in (Please tick).

a) The past record of the fund.
b) The brand image created by the fund through its promotional efforts.
c) The advice given by your investment advisor or friends.
d) Any other.

d) Any other reason (Please specify)_____________________________________________

10) Why you have not invested in Mutual Fund (If investment is not made in MF):

a) Unaware of this investment avenue
b) Do not perceive as safe investment avenue
c) You feel that other investment avenues are more better / attractive.
d) Mutual Fund are not tailored to your needs
e) Any other reason (Please specify)_____________________________________________

11) Why you have shifted your investment from Mutual Fund to some other avenue (If earlier investment was being done in Mutual Fund and now nothing invested in Mutual Fund):

a) Less return in Mutual Fund.
b) Losses being incurred by you on investment in Mutual Fund.
c) Cannot afford.
d) Any other reason (Please specify)_____________________________________________