Investor Perception about Mutual Funds in India

Questionnaire

Personal Data

Name: ___________________________ Age: ______ Sex: M □ F □

Occupation ___________________ No. of Members in the Family ______

City: ___________________________ Annual Income (Optional) ______

(Please tick the relevant columns)

1. What types of investments do you have?

Bank F.D □ Gold □ Mutual Funds □

House Property □ Bonds & Debentures □ Insurance Schemes □

Shares □ Post office Savings □ Any other □

2. What is the frequency of your investments?

Monthly □ Yearly □ Occasionally □

3. How did you happen to select mutual funds?

On the recommendation of friends □ On the recommendation of investment advisor □

Tempted by advertisement □ By analysing fund performance □

4. How do you rank the objectives behind investment in Mutual Funds? (put 1, 2, 3 & 4)

Return □ Security □ Liquidity □ Tax benefits □

5. Presently how much of your total investment is in Mutual Funds?

Less than 5% □ 10%-20% □ Above 30% □

5% - 10% □ 20%-30% □

6. Are you aware of the features of mutual fund schemes in which you have invested? (investment pattern, expense ratio etc.)

No □ have a general idea □ to the extent disclosed by □ fund houses

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7. Are you aware of the risk involved in the schemes you have selected?
   Yes ☐ No ☐

8. Which type of mutual fund schemes do you prefer?
   Equity schemes ☐ Debt Schemes ☐
   Equity oriented hybrid schemes ☐ Debt oriented hybrid schemes ☐

9. What return per annum do you expect from your mutual fund investments?
   5% - 10% ☐ 10%-20% ☐ 20%-30% ☐ Above 30% ☐

10. What term and tenure do you prefer in the investment of mutual fund schemes?
    Less than 1 year ☐ 1 - 3 Years ☐ 3 – 5 Years ☐ More than 5 Years ☐

11. What position do you give mutual funds as one of the investments avenue compared to other investment options?
    1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

12. What scope do you see for Mutual Funds as an investment avenue?
    Good scope ☐ Comparatively advantageous ☐ No Scope ☐

13. How do you find the performance of the funds you hold in terms of return?
    Excellent ☐ Good ☐ Satisfactory ☐ Poor ☐

14. How do you classify your fund houses on the basis of investor servicing you receive?
    (timely receipt of certificate, receipt of dividend warrants etc.) Write the name of the fund houses against the relevant adjective.
    Excellent .................................................................
    Satisfactory .............................................................
    Poor ...........................................................................

15. In your opinion, what is the effect and utility of mutual funds in the society? Write briefly.
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