Product short-list

Products	Product Type	Client Category Type			
		C1	C2	C3	C4
*Fixed Deposits	P1	√	√	√	√
*Short Term Income Funds	P2		√	√	√
*Short Term Gilt Funds	P2		√	√	√
*Liquid Funds	P2		√	√	√
* Ultra Short Term Funds	P2		√	√	√
***Traditional Life Insurance	P2		√	√	√
*Arbitrage Funds	P2		√	√	√
***Endowment Plan/Whole – life plan (if not ILP)	P2		√	√	√
**FMP Plans	P3			√	√
**Long Term Income Funds	P3			√	√
**Long Term Gilt Funds	P3			√	√
**Monthly Income Plan	P4				√
**Equity Funds	P4				√
**Balanced Funds	P4				√
**ULIP's	P4				√
**Asset Allocation Fund	P4				√
**Fund of Funds	P4				√
**Portfolio Management Services	P4				√
**Structured Products (Equity Linked Debentures)	P4				√
**Direct Equity	P4				√
**Real Estate Funds/REITS	P4				√
**Arbitrage Plus Funds	P4				√

Category C1: My/Our priority is capital preservation and I/we am/are willing to accept **minimal risks**. In return, I/we understand that I/we may receive minimal or low returns.

Category C2: I/We am/are willing to accept **some risks** (under normal market conditions) in exchange for some potential returns over the medium to long term.

Category C3: I/We am/are willing to accept **moderate level of risks** (under normal market conditions) in exchange for higher potential C3 returns over the medium to long term

Category C4: I/We am/are willing to accept **significant risks** to maximize my/our potential return over the long term. I/We understand that I/we may lose a significant part or all of my/our capital.

Financial Objective:

** Investments are made for Capital Preservation and Regular Income*

*** Investments are made for Wealth Accumulation/Education/Retirement*

**** Investment is made to meet insurance needs*