

Knowledge and experience

In this section, we will ask questions about your history with investing and understanding of finance. Your knowledge and experience will allow us to determine how well equipped you are to invest in products that may be fit for your suitable risk level.

1. How long have you invested in financial markets?

☐ Never/I don't know ☐ Less than 1 year ☐ 1–3 years ☐ More than 3 years

2. How do you rate your own knowledge of investing?

☐ None ☐ Basic ☐ Reasonable ☐ Expert

3. Where does your investment knowledge come from? Select all that apply.

☐ Qualification ☐ Professional experience ☐ Personal investing
☐ Reading books, articles and/or websites ☐ None

4. Diversifying your portfolio across many types of investments help to reduce risk.

☐ Strongly Disagree ☐ Disagree ☐ Neutral ☐ Agree ☐ Strongly Agree

5. Past performance is not always a good indicator of future returns.

☐ Strongly Disagree ☐ Disagree ☐ Neutral ☐ Agree ☐ Strongly Agree

6. Investments may go down as well as up.

☐ Strongly Disagree ☐ Disagree ☐ Neutral ☐ Agree ☐ Strongly Agree

7. Good investing requires committing money for the medium to long term.

☐ Strongly Disagree ☐ Disagree ☐ Neutral ☐ Agree ☐ Strongly Agree

8. A portfolio that has a large proportion of stocks and shares may lose a significant amount of its value.

☐ Strongly Disagree ☐ Disagree ☐ Neutral ☐ Agree ☐ Strongly Agree
