

# Which type of INVESTOR are you?

Every investor has different goals – goals that are linked to your risk/return appetite



## 1. Growth - Seeking

You're young, you have low financial commitments, and a big desire to grow your wealth.



## 2. Balanced – Income & Growth

You have a family, a mortgage and other commitments.

You are seeking regular income.

Your investments must work as hard as you do.



## 3. Conservative Stable Income

Your appetite for risk is low. However, you are looking for additional income.



### Investment Objective

Can tolerate substantial negative price movements

Objective is to achieve a substantial capital growth

Willing to take some market fluctuations

Willing to take risks to maximize investment returns

Willing to stay invested for a significant amount of time

Fair amount of knowledge of investment products

Aware of inherent risks

Stocks  
Warrants  
Futures & Options

### Risk/Return Appetite

Can tolerate moderate negative price movements

Objective is to seek a balance of regular income returns and capital appreciation over medium to long term period

Willing to take occasional market fluctuations but have a moderate risk tolerance

Likely to hold a well balanced portfolio of low to high risk investments

Basic knowledge of investment products and risks

Stocks  
ETFs  
REITs

### Knowledge in Investment

Can tolerate limited negative price movements

Objective is to achieve investment returns for long term investment with less risk

Capital preservation with low appetite for risk

Preferred for long term investment

Have limited knowledge of investment products

ETFs  
REITs  
ETBS

### Recommended Investment Types

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