

Investor Profile Questionnaire

Mega Equity takes a personal approach to creating your financial plan. This questionnaire will help us decide what investment mix is right for you.

Important considerations when choosing investments:

Time Horizon:

When will you begin withdrawing your money from your account, and at what rate? If that date is many years away, you may be comfortable with a portfolio that carries a greater potential for appreciation and higher level of risk. There's more time to weather the inevitable ups and downs of the market.

Risk Tolerance:

How do you feel about risk? Some investments - fluctuate more dramatically in value than others but may have the potential for higher returns. It's important that you select investments that fit within your level of tolerance for this risk.

How we can help you make investment decisions

1. Complete the questionnaire

Answer the questions on the following pages and we will use this information to identify an investor profile that matches your answers.

2. Recommend an investment strategy

With your Investor profile in mind, we will recommend a personal investment strategy that may be most appropriate for you.

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Circle the number of points for each of your answers and note the total for each section

Part 1. TIME HORIZON

1. I plan to begin withdrawing money from my investments in:

Less than 3 years	1
3–5 years	3
6–10 years	7
11 years or more	10

2. Once I begin withdrawing funds from my investments, I plan to spend all of the funds in:

Less than 2 years	0
2–5 years	1
6–10 years	4
11 years or more	8

Subtotal: Time Horizon Score

Enter the total points from questions 1 and 2. Time Horizon Score: _____
point(s)

A score of less than 3 indicates a very short investment time horizon. For such a short time horizon, a relatively low-risk portfolio of 40% short-term (average maturity of five years or less) bonds or bond funds and 60% cash is suggested, as stock investments may be significantly more volatile in the short term.

If your score is 3 or more, please continue to Section 2.

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PART 2: RISK TOLERANCE

3. I would describe my knowledge of investments as:

None	0
Limited	2
Good	4
Extensive	6

4. When I invest my money, I am:

Most concerned about my investment losing value	0
Equally concerned about my investment losing or gaining value	4
Most concerned about my investment gaining value	8

5. Select the investments you currently own or have owned in the past with the highest number of points. Circle that number.

Money market funds or cash investments	0
Bonds and/or bond funds	3
Stocks and/or stock funds	6
International securities and/or international funds	8

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6. Consider this scenario:

Imagine that in the past three months, the overall stock market lost 25% of its value. An individual stock investment you own also lost 25% of its value.

What would you do?

Sell all of my shares	0
Sell some of my shares	2
Do nothing	5
Buy more shares	8

7. Review the chart below.

We've outlined the most likely best- and worst-case annual returns of five hypothetical investment plans. Which range of possible outcomes is most acceptable to you?

The figures are hypothetical and do not represent the performance of any particular investment.

Best - and Worst - Case Scenarios (1-year)				
Plan	Average Annual Return	Best-Case	Worst-case	Points
A	7%	15%	-6%	0
B	9%	25%	-12%	3
C	10%	33%	-18%	6
D	12%	43%	-24%	8
E	15%	50%	-28%	10

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MEGA EQUITY

SECURITIES & FINANCIAL SERVICES PUBLIC LTD.

Regulated by the Cyprus Securities & Exchange Commission

Member of the Cyprus Stock Exchange / Member of the Athens Stock Exchange

Subtotal: Risk Tolerance Score

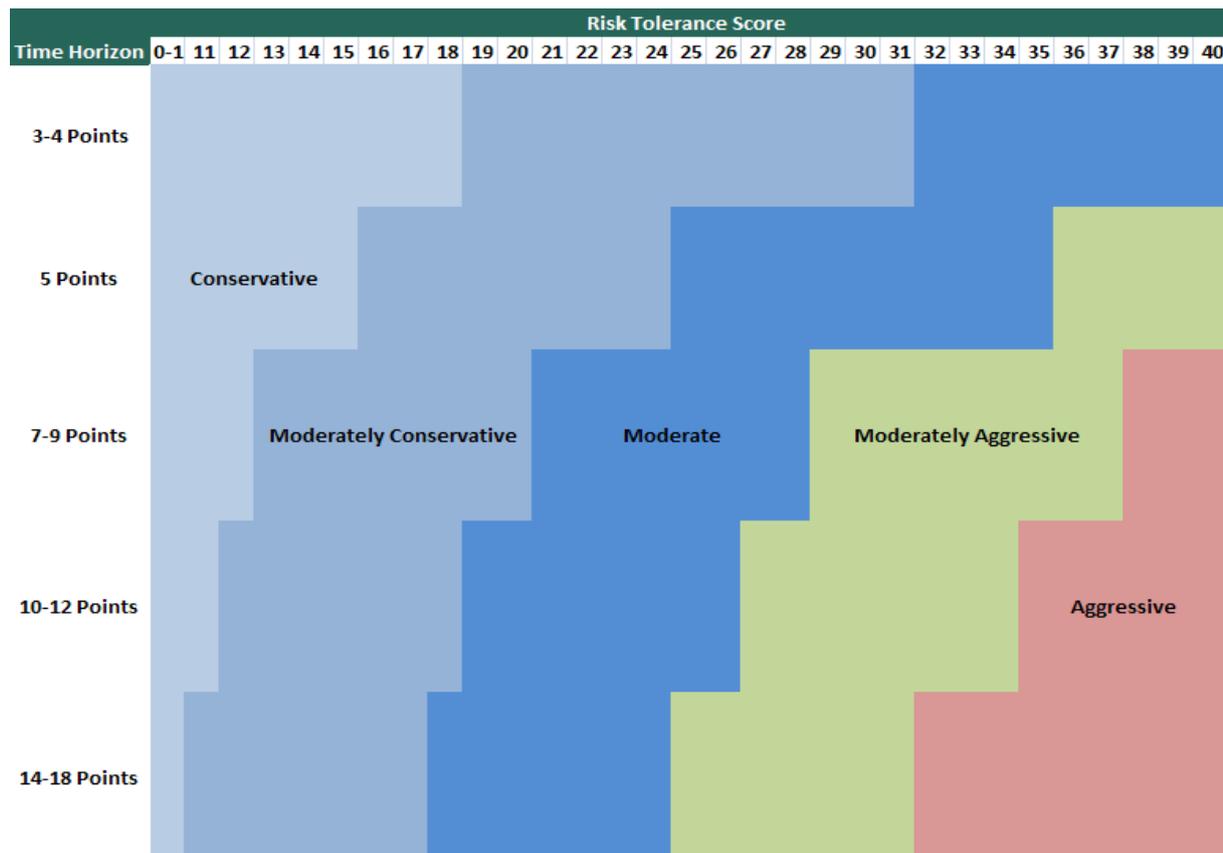
Enter the total points for questions 3 through 7.

Risk Tolerance Score: _____ point(s)

Your Investor Profile

The chart below uses the subtotals you calculated in the preceding two sections.

To determine your Investor profile, find your Time Horizon Score along the left side and your Risk Tolerance Score across the top. Locate their intersection point, situated in the area that corresponds to your Investor profile.



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