

SET	TYPE	MARKS	QUESTION	CO	PI	Bloom's Level	Accessible For	ANSWER-ONE	ANSWER-ONE-STATUS	ANSWER-TWO	ANSWER-TWO-STATUS	ANSWER-THREE	ANSWER-THREE-STATUS	ANSWER-FOUR	ANSWER-FOUR-STATUS
A	SINGLE-CORRECT	0.5	Financial planning seeks to	CO1		Remember	My Institute	Assess adequacy of income and assets for needs	correct	Assess transmission plan	incorrect	Offer tax advice	incorrect	Offer investment advice	incorrect
A	SINGLE-CORRECT	0.5	Joint families giving way to nuclear families has increased the need for financial planning	CO1		Remember	My Institute	TRUE	correct	FALSE	incorrect	Can't Say	incorrect		incorrect
A	SINGLE-CORRECT	0.5	If in today's money terms, investor needs ` 20 lakhs, and the goal is likely in 14 years with inflation at 15%, then the future requirement of funds for the goal is	CO1		Remember	My Institute	$20,00,000 \div (1 + 10\%)^{14}$	correct	$20,00,000 \times (1 + 14\%)^{10}$	incorrect	$20,00,000 \div (1 + 10\%)^{14}$	incorrect	$20,00,000 \times \{(1 + 10\%) \times 14\}$	incorrect
A	SINGLE-CORRECT	0.5	In early stages of one's career, client is in	CO1		Remember	My Institute	Windfall	incorrect	Transition	incorrect	Accumulation	correct	Distribution	incorrect
A	SINGLE-CORRECT	0.5	Systematic Withdrawal Plan is suitable for retired investors	CO1		Remember	My Institute	FALSE	incorrect	TRUE	correct	indifferent	incorrect		
A	SINGLE-CORRECT	0.5	Systematic Withdrawal Plan is suitable for	CO1		Remember	My Institute	Tax Planning	incorrect	Retirement Planning	incorrect	Rupee Cost Averaging	incorrect	all the above	correct
A	SINGLE-CORRECT	0.5	Wealth management service is normally offered to clients whose cash flows are adequate to meet needs	CO1		Remember	My Institute	TRUE	correct	FALSE	incorrect	Can't Say	incorrect		
A	SINGLE-CORRECT	0.5	Tight monetary policy is a feature of high inflation scenarios	CO1		Remember	My Institute	Yes	correct	No	incorrect	sometimes	incorrect		
A	SINGLE-CORRECT	0.5	The goal of wealth management is to sustain and grow wealth	CO1		Remember	My Institute	in short term	incorrect	in long term	correct	Can't Say	incorrect		
A	SINGLE-CORRECT	0.5	Units in Mutual funds are allocated on	CO1		Remember	My Institute	market price	incorrect	index price	incorrect	NAV	correct	benchmark price	incorrect
A	MULTIPLE-CORRECT	0.5	XIRR is used to calculate	CO1		Remember	My Institute	CAGR	correct	Intermittent investments	correct	investment with uneven cash flows	correct	all the above	correct
A	SINGLE-CORRECT	0.5	SRO regulating Mutual Funds Industry is	CO1		Remember	My Institute	SEBI	incorrect	FIMMDA	incorrect	AMFI	correct	IRDA	incorrect
A	SINGLE-CORRECT	0.5	suppose the food inflation is 9% per annum and Birju's daughter's marriage is approaching in 12 months. He wants to arrange the same pompous arrangement which his cousin arranged yesterday for his daughter's marriage, for which he is stating that he spent 60 lakh rupees. Birju shall need a corpus of	CO2		understand	My Institute	6000000	incorrect	6540000	correct	6450000	incorrect	5504587.156	incorrect
A	MULTIPLE-CORRECT	0.5	One of the leading indicator of economy is	CO2		understand	My Institute	Movement of FII	correct	Rating of country	correct	Both A and B	correct	None A and B	incorrect
A	SINGLE-CORRECT	0.5	Status Quo bias and Cognitive Dissonance Bias are	CO2		understand	My Institute	Positively correlated	incorrect	Negatively Correlated	correct	None	incorrect		
A	MULTIPLE-CORRECT	0.5	example of Contagion/Ripple effect is	CO2		understand	My Institute	falling Banking stocks in india after SVB Saga	correct	Global Recession after subprime crisis	correct	Correcting in IT sector in India due to U.S Inflation	correct	all the above	correct

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A	SINGLE-CORRECT	0.5	Sticking to buying price of asset is known as	CO2		understand	My Institute	Anchoring Bias	correct	Herd Bias	incorrect	Mental Accounting	incorrect	none of above	incorrect
A	MULTIPLE-CORRECT	0.5	Mental Accounting leads to	CO2		understand	My Institute	disciplined investing	correct	goal based investing	correct	Both A and B	correct	None A and B	incorrect
A	SINGLE-CORRECT	0.5	Minimum investment amount needed in PMS is	CO1		Remember	My Institute	50 lakh	correct	20 lakh	incorrect	2 crore	incorrect	none	incorrect
	SINGLE-CORRECT	0.5	A bank deposit of 25,000 will earn an interest of at the end of one year, if it earns 10% pa compounded half yearly	CO2		understand	My Institute	25562.5	incorrect	2562.5	correct	2652.5	incorrect	2265.2	incorrect
	SINGLE-CORRECT	0.5	Present value of 2000 to be received 10 years later discounted at 8% is	CO2		understand	My Institute	926.38	correct	938.26	incorrect	962.32	incorrect	983.26	incorrect
	SINGLE-CORRECT	0.5	ability to understand how money works in the world?	CO1		Remember	My Institute	financial literacy	correct	Accounting	incorrect	Psychology	incorrect	G K	incorrect
	SINGLE-CORRECT	0.5	HNI stands for	CO1		Remember	My Institute	Heavy Net Individual	incorrect	High net worth individual	correct	high net individual	incorrect	none	incorrect
	SINGLE-CORRECT	0.5	A Wealth Manager should act as an _____ and not as a Salesman	CO1		Remember	My Institute	advisor	correct	auditor	incorrect	CA	incorrect	none	incorrect
	SINGLE-CORRECT	0.5	Net Worth is	CO1		Remember	My Institute	difference of asset and liabilities	correct	sum of assets and liabilities	incorrect	Both A and B	incorrect	none	incorrect
	SINGLE-CORRECT	0.5	rina's monthly expense is 50000 today, will she be able to meet these expenses after 20 years , for 3 years, if she makes a SIP of 5000 per month at 15% return. Consider inflation as 6%	CO2		understand	My Institute	yes	correct	no	incorrect	may be	incorrect	can't say	incorrect
	SINGLE-CORRECT	0.5	EPF is an investment in	CO2		understand	My Institute	debt securities	correct	equities	incorrect	Both A and B	incorrect	none	incorrect
	SINGLE-CORRECT	0.5	there are two type of brokerages in Mutual funds	CO2		understand	My Institute	trail and upfront	correct	direct and regular	incorrect	direct and indirect	incorrect	none	incorrect
	SINGLE-CORRECT	0.5	mutual funds provide	CO1		Remember	My Institute	liquidity	correct	hedging	incorrect	Both A and B	incorrect	none	incorrect
	SINGLE-CORRECT	0.5	debt based mutual funds have	CO1		Remember	My Institute	exit load	correct	entry load	incorrect	Both A and B	incorrect	none	incorrect
	SINGLE-CORRECT	0.5	marcellus is a	CO1		Remember	My Institute	PMS	correct	AMC	incorrect	SRO	incorrect	none	incorrect
	SINGLE-CORRECT	0.5	ICICI Prudential is a	CO1		Remember	My Institute	PMS	incorrect	AMC	correct	SRO	incorrect	Insurance firm	incorrect
	SINGLE-CORRECT	0.5	Pru ICICI is a	CO1		Remember	My Institute	PMS	incorrect	AMC	incorrect	SRO	incorrect	Insurance firm	correct
	MULTIPLE-CORRECT	0.5	Equity Mutual funds are	CO1		Remember	My Institute	sectoral	correct	diversified	correct	Both A and B	correct	none	incorrect
	SINGLE-CORRECT	0.5	Retirement Planning shall be started	CO1		Remember	My Institute	ASAP	correct	near retirement	incorrect	after marriage	incorrect	none	incorrect
	SINGLE-CORRECT	0.5	REITS stands for	CO1		Remember	My Institute	real estate insurance team	incorrect	real estate investment trusts	correct	real estate investor trusts	incorrect	real estate investment tank	incorrect
	MULTIPLE-CORRECT	0.5	wealth management comprise of	CO1		Remember	My Institute	financial planning	correct	tax planning	correct	retirement planning	correct	all the above	correct

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	SINGLE-CORRECT	0.5	to buy a car worth 500000 after 5 years, how much SIP to be started, if I invest in FD each month for 5% for 5 years	CO2		understand	My Institute	? 7,352.38	correct	7353.29	incorrect	7500	incorrect	none	incorrect
	SINGLE-CORRECT	0.5	FBR comprise of	CO1		Remember	My Institute	Expense, Asset, Liability, Net Worth	incorrect	Income,Expense, Liability, Net Worth	incorrect	Income,Expense, Asset, Liability	correct	Income,Expense, Asset, Liability, Net Worth	incorrect
	SINGLE-CORRECT	0.5	Hansika deposited 10,000 in bank FD for 5 years @ 9%, will she be able to buy a mobile worth 15,000 today, price inflated at 5% after 5 years	CO2		understand	My Institute	yes	incorrect	no	correct	may be	incorrect	can't say	incorrect