

【投資適合度分析-CIP (Customer Investment Profile)】

1. 投資適合度分析問卷 Start CIP Questionnaire

步驟 1. 左側選單「投資適合度分析」
→ 填寫新問卷

Hi Ken Lin,

客戶投資適合度分析

客戶投資適合度分析結果

親愛的客戶您好：
您的最新客戶投資適合度分析於 2018/09/21 完成，目前仍有效。

您於本行目前最新留存之客戶投資適合度分析結果風險等級為「6-非常積極型」，此一記錄將作為日後於本行進行各項投資商品之適配指標。如於網路銀行/行動銀行便可進行適合您的商品風險等級的基金申請或轉換；若您欲重新填寫，請點選「填寫新問卷」，若您欲檢視已完成的投資適合度分析內容，請點選「檢視歷史分析結果」，謝謝。

請注意，網路銀行客戶投資適合度分析僅適用於一般自然人客戶，倘公司法人組織團體等非自然人客戶需要填寫客戶投資適合度分析，請洽往來分行，謝謝。

客戶適合度分析結果風險等級分圖

1	2	3	4	5	6
保本型	保守型	穩健型	成長型	積極型	非常積極型

風險適合度分析結果說明

- 您尋求卓越的投資資金成長，並願意在短、中、長期承受極度的投資風險及價格波動。
- 您的投資價值可能會極度低於原始投資本金，該等級客戶也可能損失所有的原始投資本金。
- 您的風險等級結果可購買適量的風險等級為「1-保本型」、「2-保守型」、「3-穩健型」、「4-成長型」、「5-積極型」、「6-非常積極型」。

檢視歷史分析結果 | 填寫新問卷

Step1. Menu on the left
→ Evaluate now

Hi Ken Lin,

Your latest Customer Investment Profile was completed on 2018/09/21 and is still valid.

Your latest Customer Investment Profile result is "6-Very Aggressive" and it will be an important reference for matching Investment subscription or switching in Digital Banking. If you wish to take the questionnaire once again, please select "Evaluate Now"; If you have already taken this questionnaire and would like to review it, please select "View Historical CIP", thank you.

Please be advised that this Customer Investment of Profile in Digital Banking is applicable to investors who are natural persons only. For corporate or non-individual investors, please contact our branch for further information on different investment instructions. Thank you!

Risk Profile Classification

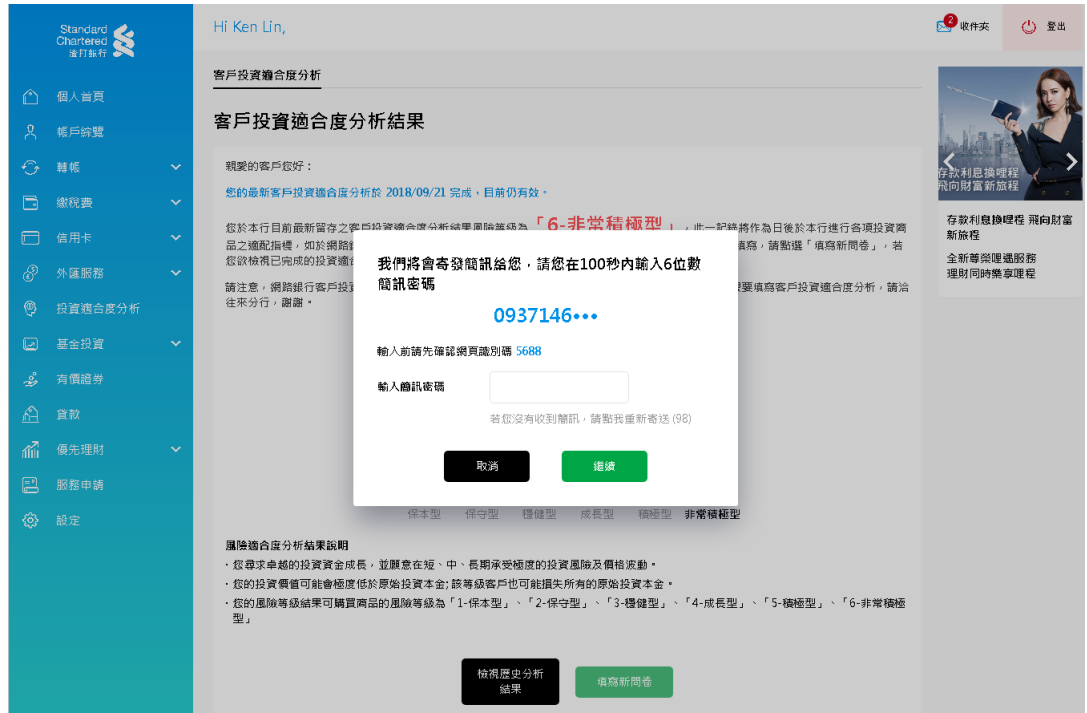
1	2	3	4	5	6
Risk Averse	Conservative	Moderate	Moderately Aggressive	Aggressive	Very Aggressive

Investment Profile Result Description

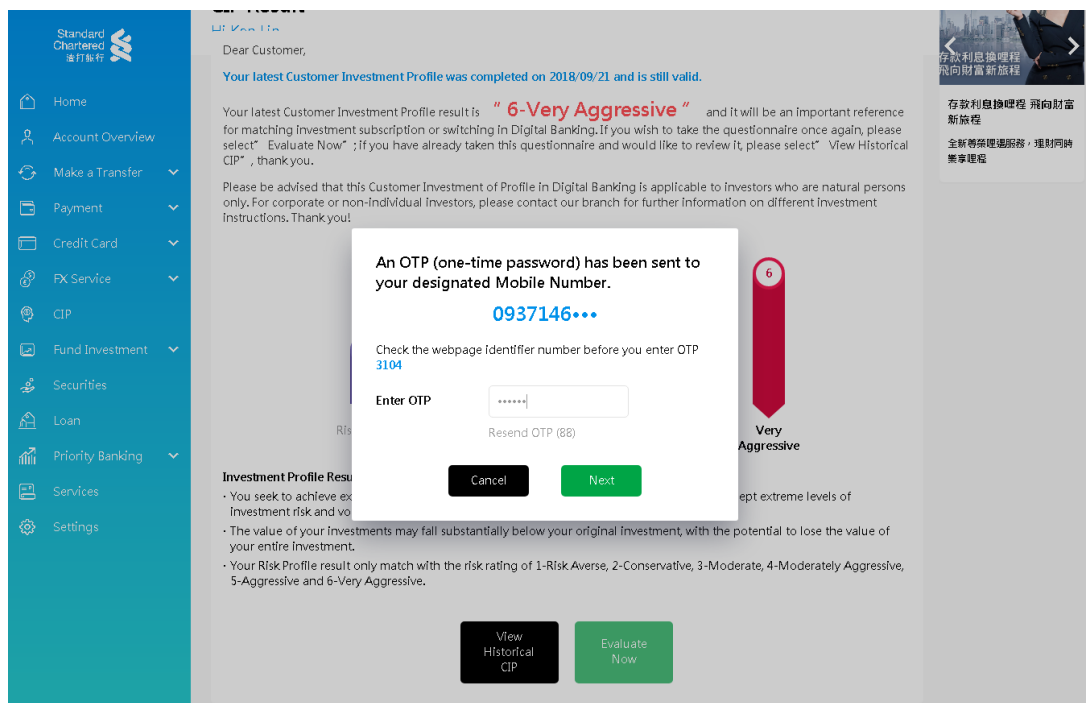
- You seek to achieve exceptional capital growth on your investments and you are willing to accept extreme levels of investment risk and volatility over the short, medium and long term.
- The value of your investments may fall substantially below your original investment, with the potential to lose the value of your entire investment.
- Your Risk Profile result only match with the risk rating of 1-Risk Averse, 2-Conservative, 3-Moderate, 4-Moderately Aggressive, 5-Aggressive and 6-Very Aggressive.

View Historical CIP | Evaluate Now

步驟 2. 輸入簡訊密碼



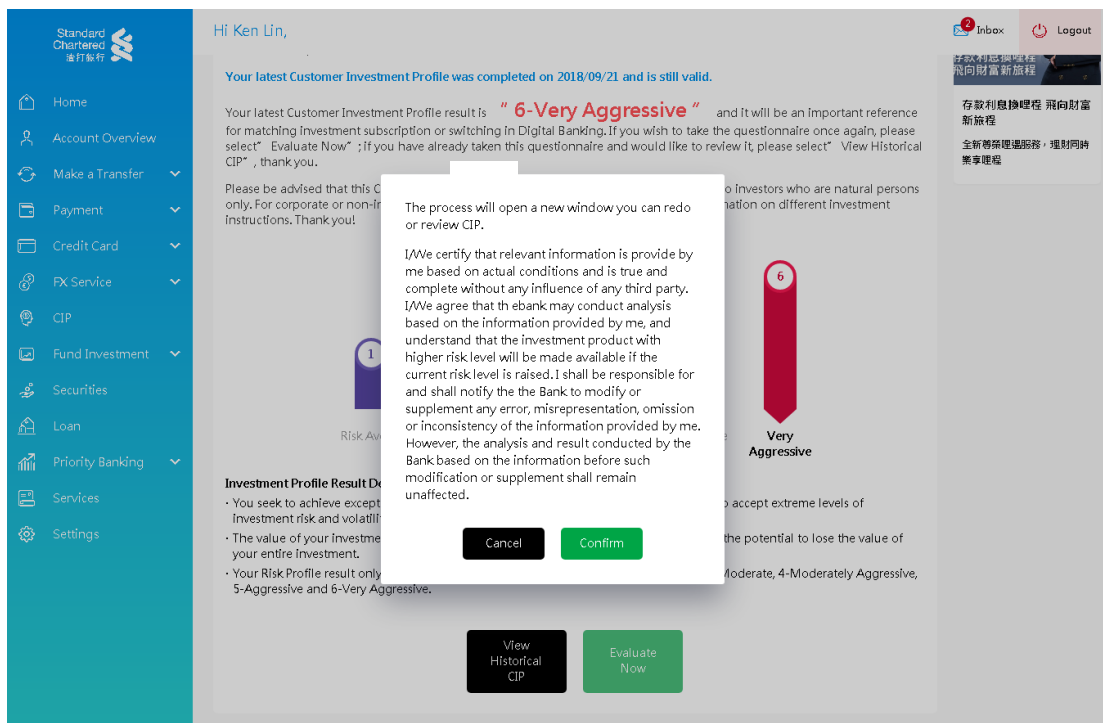
Step 2.
Enter SMS OTP



步驟 3. 系統提示另
開视窗以進行投資
適合度分析
→確認



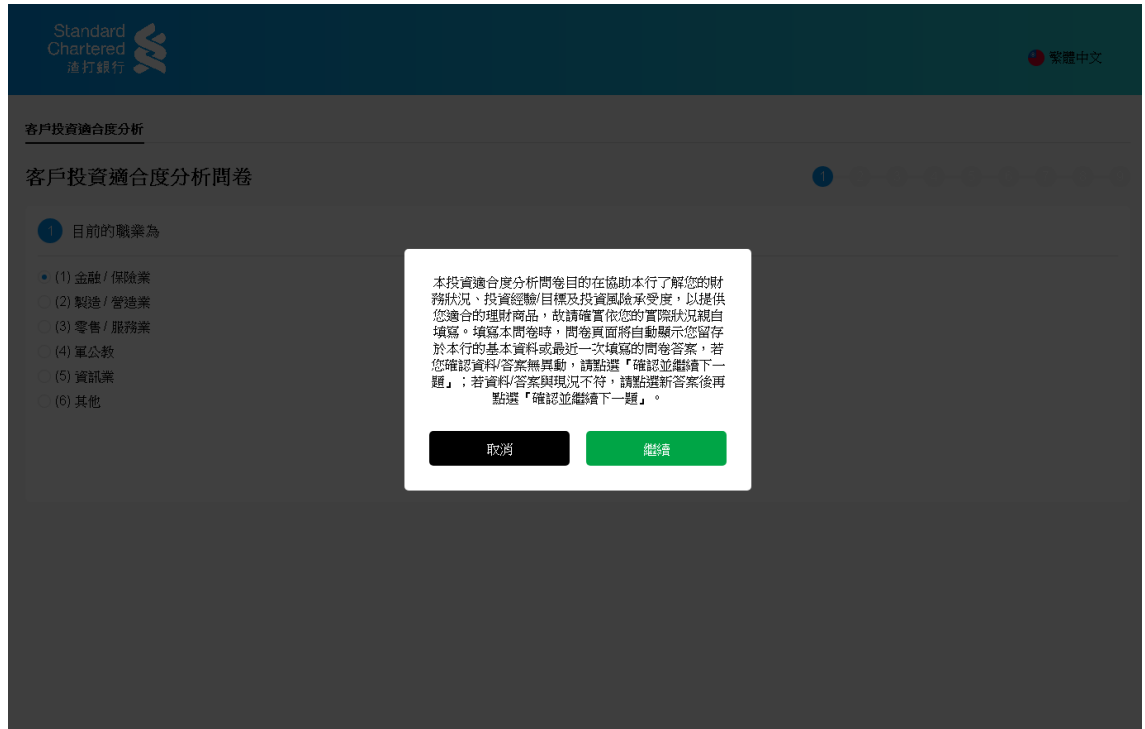
Step3. A message
indicating that
system will open a
new window to
redo or review CIP.
→Confirm



步驟 4. 閱讀相關警

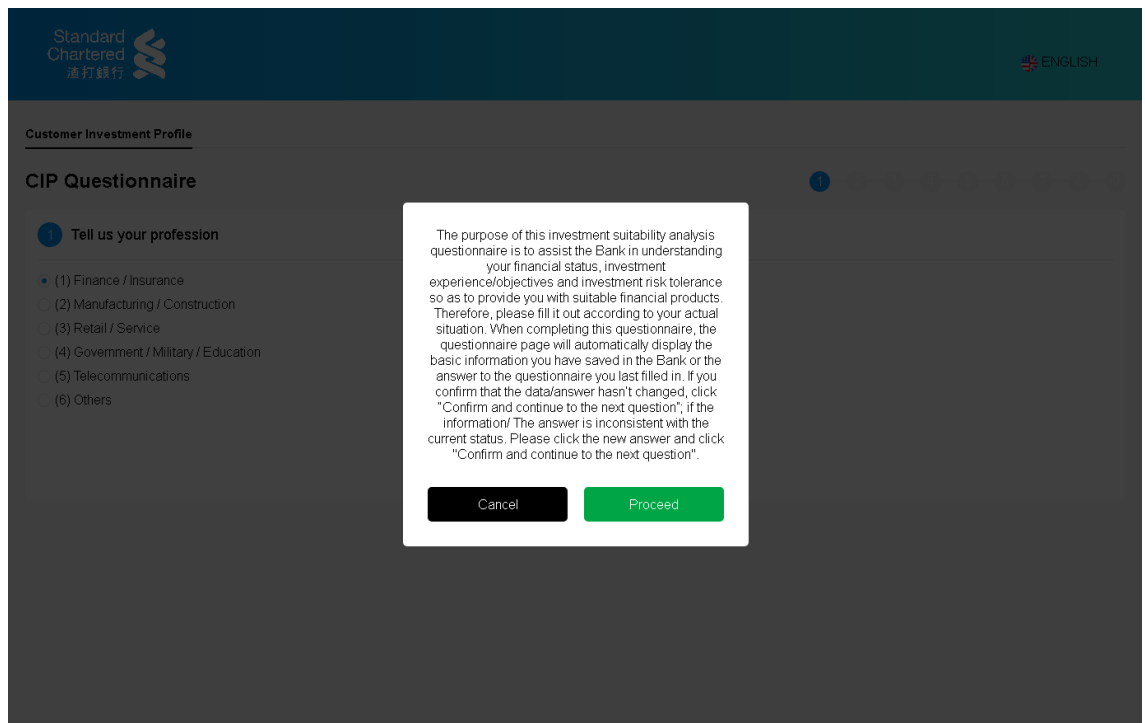
語

→繼續



Step4. Read the warning

→Proceed



2. 問卷 CIP Contents

步驟 1. 職業

→ 確認並繼續下一題

The screenshot shows the 'Customer Investment Profile' questionnaire in Traditional Chinese. The header includes the Standard Chartered logo and the text '渣打銀行' and '繁體中文'. The main title is '客戶投資適合度分析問卷'. A progress bar at the top right shows 10 steps, with the first step highlighted. The question is '目前的職業為' (Current profession is). The options are: (1) 金融 / 保險業 (Finance / Insurance), (2) 製造 / 營造業 (Manufacturing / Construction), (3) 零售 / 服務業 (Retail / Service), (4) 軍公教 (Government / Military / Education), (5) 資訊業 (Telecommunications), and (6) 其他 (Others). At the bottom, there are two buttons: '取消' (Cancel) and '確認並繼續下一題' (Confirm and Proceed).

Step1. Profession

→ Confirm and proceed

The screenshot shows the 'Customer Investment Profile' questionnaire in English. The header includes the Standard Chartered logo and the text '渣打銀行' and 'ENGLISH'. The main title is 'CIP Questionnaire'. A progress bar at the top right shows 10 steps, with the first step highlighted. The question is 'Tell us your profession'. The options are: (1) Finance / Insurance, (2) Manufacturing / Construction, (3) Retail / Service, (4) Government / Military / Education, (5) Telecommunications, and (6) Others. At the bottom, there are two buttons: 'Cancel' and 'Confirm and Proceed'.

步驟 2. 年齡及教育程度
→ 確認並繼續下一題

Standard Chartered 渣打銀行

客戶投資適度分析

客戶投資適度分析問卷

2 年齡及教育程度

(1) 年齡為65歲(含)以上 1. 是 2. 否

(2) 最高教育程度為 1. 國中(含)以下 2. 高中(職) 3. 大專(含)以上

(3) 主要依賴在渣打銀行的儲蓄支付日常生活開銷 1. 是 2. 否

取消 上一題 確認並繼續下一題

Step2. About yourself
→ Confirm and proceed

Standard Chartered 渣打銀行

Customer Investment Profile

CIP Questionnaire

2 Tell us about yourself

(1) I am 65 years old and older 1. Yes 2. No

(2) My highest level of education is 1. All up to junior high 2. High School 3. University

(3) I rely on the majority of my savings with SCB to fund my basic living expenses. 1. Yes 2. No

Cancel Previous Question Confirm and Proceed

步驟 3. 財務狀況

→ 確認並繼續下一題

Chartered 渣打銀行 繁體中文

客戶投資適度度分析

客戶投資適度度分析問卷

3 目前財務狀況及資金來源 (新台幣\$)

(1) 年收入 (例：薪資、紅利、租金收入、遺產贈與所得、獨資/合夥事業所得、投資所得或其他業務收入等) \$	1,500,000
(2) 房地產市值 \$	15,000,000
(3) 現金及存款總值 \$	4,000,000
(4) 投資商品 (例：共同基金、股票、債券及其他金融商品總值) \$	2,000,000
(5) 其他 (例：自有事業財產等總值) \$	0
(6) 總負債 (例：個人及房屋貸款、應付賬款及其他債務等未清償總金額) \$	6,000,000
(7) 淨資產總額 ((2)+(3)+(4)+(5)-(6))	15,000,000 <small>系統自動加總，客戶無需填寫</small>
(8) 流動資產總額 ((3)+(4))	6,000,000 <small>系統自動加總，客戶無需填寫</small>

取消 上一題 確認並繼續下一題

Step 3. Financial

Situation

→ Confirm and proceed

Standard Chartered 渣打銀行 ENGLISH

Customer Investment Profile

CIP Questionnaire

3 What is your current financial position and source of fund? (NTD\$)

(1) My estimated annual income is	1,500,000
(2) Real Estate	15,000,000
(3) Cash & Deposits	4,000,000
(4) Investment Products (Mutual Funds, Equities, Bonds etc)	2,000,000
(5) Others (Business etc)	0
(6) Outstanding loans or credit	6,000,000
(7) My Total Net Worth ((2)+(3)+(4)+(5)-(6))	15,000,000 <small>The system automatically adds up, customers do not need to fill out</small>
(8) Total Liquid Assets ((3)+(4))	6,000,000 <small>The system automatically adds up, customers do not need to fill out</small>

Cancel Previous Question Confirm and Proceed

步驟 4. 投資目標與
風險承受度
→ 確認並繼續下一
題

Standard Chartered 渣打銀行

繁體中文

客戶投資適合度分析

客戶投資適合度分析問卷

1 2 3 4 5 6 7 8 9

4 投資目標及風險承受度

投資涉及風險與回報之間的取捨。根據經驗，倘投資者欲尋求較高平均長期回報，則其投資組合價值會有較大波動，並通常較擁有保守投資組合的投資者更容易蒙受損失。渣打銀行建議藉由投資多樣的產品，以應對這些風險。

投資目標	風險承受度*	投資損失恢復期間**
<input type="radio"/> (1) 唯一目標為 到期保本 。例如定存。	不願意承受任何投資所產生的風險	-
<input type="radio"/> (2) 高於定存利率 。例如政府債券。	低於10%(不含)	2年
<input type="radio"/> (3) 低至中等 的投資報酬。例如投資等級的公司債。	10%-15% (不含)	2-3年
<input type="radio"/> (4) 中至高 的投資報酬。例如股票型基金。	15%-20% (不含)	3-5年
<input type="radio"/> (5) 巨額 投資報酬。例如股票。	20%-30% (不含)	超過5年
<input checked="" type="radio"/> (6) 卓越 投資報酬。例如私募基金。	30%(含)以上	超過5年

*風險承受度 反映您一年中可接受於本行往來資產的潛在價格下跌區間。以上參考區間是以歷史資料統計而來；在極端的市場情況下，價格的波動可能會比參考區間更大。 **投資損失恢復期間 此為您願意等候總投資價值由虧損中恢復的期間。請注意損失未必能夠補回，甚至損失全部價值。

取消 上一題 確認並繼續下一題

Step4. Investment
objective and risk
tolerance
→ Confirm and
proceed

Standard Chartered 渣打銀行

ENGLISH

Customer Investment Profile

CIP Questionnaire

1 2 3 4 5 6 7 8 9

4 What is your Investment Objective and risk tolerance ?

Investing involves a trade-off between risk and return. Historically, investors who have received higher average long-term returns have experienced greater fluctuations in the value of their portfolio and more frequent losses than investors with more conservative investments. We have provided time periods that indicate how long you might have to hold a position in order to recover from a loss. Please keep in mind that it is possible that some investments may lose their total value or might take longer to recover. Standard Chartered recommends investing into multiple products to address these risks through diversification.

Your Investment Objective	Risk You Are Prepared to Accept*	Indicative Recovery Periods**
<input type="radio"/> (1) My sole Objective is to protect the value of My capital . Time Deposits are one example of products that might meet this Investment Objective.	I am not comfortable in taking any Investment risk.	-
<input type="radio"/> (2) My objective is to achieve investment returns above deposit rates . Government bonds are one example of products that might meet this investment objective.	I am only comfortable in taking a low level of investment risk. (1% - 10%)	Up to 2 years
<input type="radio"/> (3) My objective is to achieve low to moderate capital growth on my investments. Investment-grade corporate bonds are one example of products that might meet this investment objective.	I am willing to take moderate levels of investment risk. (10% - 15%)	2-3 years
<input type="radio"/> (4) My objective is to achieve moderate to high capital growth on my investments. Equity Mutual Funds are one example of products that might meet this investment objective.	I am willing to take high levels of investment risk. (15% - 20%)	3-5 years

步驟 5. 投資計畫期間
資金流動需求
→ 確認並繼續下一
題

Standard Chartered 渣打銀行

繁體中文

客戶投資適度分析

客戶投資適度分析問卷

5 投資計劃期間資金流動需求

若您近期需要將在本行的部份投資贖回，請選擇：

- (1) 在未來 12 個月內，贖回 75% 以上的投資。
- (2) 在未來 2(不含) - 3 年，贖回 50% 以上的投資。
- (3) 未來 2 年(含)內，贖回 25% 以上的投資。
- (4) 不需要 依靠贖回投資來滿足我的資金流動需求。

取消 上一題 確認並繼續下一題

Step5. Capital
demand during
investment period
→ Confirm and
proceed

Standard Chartered 渣打銀行

ENGLISH

Customer Investment Profile

CIP Questionnaire

5 Will you require the ability to access your investment for the purpose of withdrawing cash?

For liquidity purposes, you may require the ability to withdraw your investments from SCB. Please choose from the most applicable option:

- (1) I require the ability to withdraw more than 75% of my SCB investments in the next 12 months.
- (2) I require the ability to withdraw more than 50% of my SCB Investments in the next 2 - 3 years.
- (3) I require the ability to withdraw more than 25% of my SCB investments in the next 2 years.
- (4) I do not require the ability to withdraw my SCB investments to meet my liquidity needs.

Cancel Previous Question Confirm and Proceed

步驟 6. 投資下跌之
影響
→ 確認並繼續下一
題

Standard Chartered 渣打銀行

繁體中文

客戶投資適合度分析

客戶投資適合度分析問卷

6 投資價值下跌對您的影響

- (1) 不願意接受任何投資價值的減損，**到期保本**是主要目標。
- (2) 願意接受**一點**投資價值的減損，但不願意接受中到極端端的投資損失。
- (3) 願意接受**中度**投資價值的減損，但不願意接受極端的投資損失。
- (4) 為了追求長期投資報酬的極大化，有接受**極端**的投資損失與大幅波動的準備。

取消 上一題 確認並繼續下一題

Step6. The effect
of the decline in
your investment
→ Confirm and
proceed

Standard Chartered 渣打銀行

ENGLISH

Customer Investment Profile

CIP Questionnaire

6 How would a decline in the value of your investments affect you?

- (1) I am not willing to accept declines in the value of my investment as **capital preservation** is my primary objective.
- (2) I am willing to accept **some** declines, but I am not comfortable with moderate to extreme drops in the value of my investments.
- (3) I am willing to accept **moderate** declines, but I am not comfortable with extreme drops in the value of my investments.
- (4) I am prepared to **take extreme losses and large fluctuations** in the value of my investments in order to maximize my long term returns.

Cancel Previous Question Confirm and Proceed

步驟 7. 商品知識

→ 確認並繼續下一題

Standard Chartered 渣打銀行

繁體中文

客戶投資適合度分析

客戶投資適合度分析問卷

1 2 3 4 5 6 7 8 9

7 商品知識或投資經驗及商品風險識別能力

(1) 外匯	4. 有商品知識; 且有投資經驗 對商品風險識別能力較高
(2) 衍生性金融商品(含保本型結構型商品)	2. 無商品知識; 但有投資經驗 對商品風險識別能力適中
(3) 衍生性金融商品(含不保本型結構型商品)	2. 無商品知識; 但有投資經驗 對商品風險識別能力適中
(4) 固定收益型商品(例: 債券)	2. 無商品知識; 但有投資經驗 對商品風險識別能力適中
(5) 共同基金或單位信託基金(例: 平衡型及股票型)	2. 無商品知識; 但有投資經驗 對商品風險識別能力適中
(6) 股票	3. 有商品知識; 但無投資經驗 對商品風險識別能力適中
(7) 選擇權或槓桿交易帳戶	3. 有商品知識; 但無投資經驗 對商品風險識別能力適中

取消 上一題 確認並繼續下一題

Step7. Product knowledge

→ Confirm and proceed

Standard Chartered 渣打銀行

ENGLISH

Customer Investment Profile

CIP Questionnaire

1 2 3 4 5 6 7 8 9

7 What is your level of knowledge and experience with investment products?

(1) Foreign Currency Transactions	4. Have knowledge and have experience
(2) Derivatives (Structured Products with Principal Protection Only)	2. No knowledge and have experience
(3) Derivatives (Structured Products with Non Principal Protection Only)	2. No knowledge and have experience
(4) Fixed Income (e.g. bonds)	2. No knowledge and have experience
(5) Mutual Funds (balanced or equity)	2. No knowledge and have experience
(6) Individual Equities	3. Have knowledge and no experience
(7) Options or Leverage	3. Have knowledge and no experience

Cancel Previous Question Confirm and Proceed

步驟 8. 計畫投資持有
期間

→ 確認並繼續下一題

Standard Chartered 渣打銀行

繁體中文

客戶投資適度分析

客戶投資適度分析問卷

8 持有投資計畫的期間約為

- (1) 5年以上
- (2) 3-5年(不含)
- (3) 1-3年(不含)
- (4) 1年以下

取消 上一題 確認並繼續下一題

Step 8.
Period planned to
hold the investment
→ Confirm and
proceed

Standard Chartered 渣打銀行

ENGLISH

Customer Investment Profile

CIP Questionnaire

8 How long do you plan to hold this investment?

- (1) 5 years and above
- (2) 3-5 years
- (3) 1-3 years
- (4) Less than 1 year

Cancel Previous Question Confirm and Proceed

步驟 9. 全民健保重大
傷病證明

→ 確認並繼續下一題

Standard Chartered 渣打銀行

客戶投資適度分析

客戶投資適度分析問卷

1 2 3 4 5 6 7

9 您是否領有全民健康保險重大傷病證明?

(1) 是

(2) 否

取消 上一題 確認並繼續下一題

Step9. Registration
of critical illness with
National Health
Insurance

→ Confirm and
proceed

Standard Chartered 渣打銀行

Customer Investment Profile

CIP Questionnaire

1 2 3 4 5 6 7

9 Are you in the registration of critical illness with National Health Insurance?

(1) Yes

(2) No

Cancel Previous Question Confirm and Proceed

步驟 10. 客戶聲明→
完成問卷

Standard Chartered 渣打銀行

客戶投資適合度分析

客戶投資適合度分析問卷

1 2 3 4 5 6 7

客戶聲明

- 我/我們確認已詳閱或經由非理專之銀行相關人員清楚說明本分析，且已清楚瞭解其意義及對本人之影響。我/我們聲明相關資料內容(包含但不限於年齡及教育程度、目前財及資金來源等)係由本人依實際狀況自行填寫，均係真實與完整，未受任何第三人之影響。本人瞭解此次分析結果之風險等級，將影響可購買投資商品的風險等級。如本人所提有任何錯誤、不實或遺漏，應由本人自行負責並通知貴行更正或補充，惟貴行依據本人更正或補充前所進行之分析及結果不受影響。
- 我/我們瞭解並同意下列事項：(i)與貴行往來之前，我/我們可隨時於貴行網站(網址為：www.sc.com/tw/)或至分行取得開戶總約定書及其嗣後隨時修訂之最新版本；及(ii)我/我們行辦理信託相關商品投資均應適用貴行之開戶總約定書及其嗣後隨時修訂之最新版本。

取消 上一題 完成問卷

Step10. Customer
Disclaimer
→Complete
Questionnaire

Standard Chartered 渣打銀行

Customer Investment Profile

CIP Questionnaire

1 2 3 4 5 6 7

Customer Disclaimer

- I/We confirm that we carefully read /or through non-CRM bank staff's clear explanation fully understood the meaning and the effects of CIP results. I/We certify that the relevant information(including without limitation to age and education, current financial position and source of fund, and etc.) is provided by me based on actual conditions and complete without being affected by any third party. I/We understand that the investment products with certain risk levels available to me shall be subject to risk assessment res conducted by this CIP. I shall be responsible for and shall notify the Bank to modify or supplement any error, misrepresentation, omission or inconsistency of the information provi However, the analysis and result conducted by the Bank based on the information before such modification or supplement shall remain unaffected.
- I/We understand and agree that: (i)the Standard Terms & Conditions for Account Opening (the "T&Cs"), as updated from time to time, have been made available to me/us through Bank's official website (www.sc.com/tw/) or provided in the branch before I/we entering into contractual relationship with the Bank; and (ii) the T&Cs and its amendments shall ap trust investments through the Bank.

Cancel Previous Question Complete Questionnaire

3. 投資適合度分析問卷結果與確認 CIP Result and Confirmation

步驟 1. 分析結果
→ 確認我的風險適合度並完成

Standard Chartered 渣打銀行

繁體中文

客戶投資適合度分析

客戶投資適合度分析結果

您的客戶投資適合度分析結果為「6-非常積極型」

1 2 3 4 5 6

保本型 保守型 穩健型 成長型 積極型 非常積極型

風險適合度分析結果說明

- 您尋求卓越的投資資金成長，並願意在短、中、長期承受極度的投資風險及價格波動。
- 您的投資價值可能會極度低於原始投資本金，該等級客戶也可能損失所有的原始投資本金。
- 您的風險等級結果可購買商品的風險等級為「1-保本型」、「2-保守型」、「3-穩健型」、「4-成長型」、「5-積極型」、「6-非常積極型」。

取消 確認我的風險適合度並完成

Step1. Analysis result
→ Confirm my risk profile and complete

Standard Chartered 渣打銀行

ENGLISH

Customer Investment Profile

CIP Result

Your latest Customer Investment Profile result is 「3-Moderate」

1 2 3 4 5 6

Risk Averse Conservative Moderate Moderately Aggressive Aggressive Very Aggressive

Investment Profile Result Description

- You seek to achieve a moderate level of capital growth on your investments and you are willing to accept moderate levels of investment risk over the medium to long term (up to 3 years).
- The value of your investments can fluctuate and may fall below your original investment. While volatility is expected to be moderate, short-term losses may be higher.
- Your Risk Profile result only match with the risk rating of 1-Risk Averse, 2-Conservative and 3-Moderate.

Cancel Confirm my Risk Profile and Complete

步驟 2. 系統顯示
已填資料
→ 確認

Standard Chartered 渣打銀行
繁體中文

客戶投資適合度分析問卷

1 目前的職業為

(1) 金融 / 保險業

2 年齡及教育程度

(1) 年齡為65歲(含)以上

2 否

(2) 最高教育程度為

3 大專(含)以上

(3) 主要依賴在渣打銀行的儲蓄支付日常生活開銷

2 否

3 目前財務狀況及資金來源 (新台幣\$)

(1) 年收入(例：薪資、紅利、租金收入、遺產/贈與所得、獨資/合夥事業所得、投資所得或其他業務收入等) \$

1500000

(2) 房地產市值 \$

15000000

4 無商品知識 但具投資經驗 對商品風險識別能力適中

(6) 股票

3 有商品知識 但無投資經驗 對商品風險識別能力適中

(7) 選擇權或槓桿交易帳戶

3 有商品知識 但無投資經驗 對商品風險識別能力適中

8 持有投資計畫的期間約為

(1) 5 年以上

9 您是否領有全民健康保險重大傷病證明?

重大傷病

(2) 否

10 客戶聲明

我/我們確認已詳閱/或經由非理專之銀行相關人員清楚說明本分析，且已清楚瞭解其意義及對本人之影響。我/我們聲明相關資料內容 (包含但不限於年齡及教育程度、目前財務狀況及資金來源等) 係由本人依實際狀況自行填寫，均係真實與完整，未受任何第三人之影響。本人瞭解此次分析結果之風險等級，將影響可購買投資商品的風險等級。如本人所提供資料有任何錯誤、不實或遺漏，應由本人自行負責並通知貴行更正或補充，惟貴行依據本人更正或補充前所進行之分析及結果不受影響。

我/我們瞭解並同意下列事項 (i) 與貴行往來之前，我/我們可隨時於貴行網站(網址為: www.sc.com/tw)或至分行取得 開戶總約定書及其嗣後隨時修訂之最新版本；及 (ii) 我/我們透過貴行辦理信託相關商品投資均應適用 貴行之開戶總約定書及其嗣後隨時修訂之最新版本。

取消
確認

Step2. Answer details
→Confirm

CIP Questionnaire

1 Tell us your profession

(1) Finance / Insurance

2 Tell us about yourself

(1) I am 65 years old and older

2. No

(2) My highest level of education is

3. University

(3) I rely on the majority of my savings with SCB to fund my basic living expenses.

2. No

3 What is your current financial position and source of fund? (NTD\$)

(1) My estimated annual income is

1500000

(2) Real Estate

(7) Options or Leverage

3. Have knowledge and no experience

8 How long do you plan to hold this investment?

(1) 5 years and above

9 Are you in the registration of critical illness with National Health Insurance?

Critical Illness

(2) No

10 Customer Disclaimer

I/We confirm that we carefully read /or through non-CRM bank staff's clear explanation fully understood the meaning and the effects of CIP results. I/We certify that the relevant information (including without limitation to age and education, current financial position and source of fund, and etc.) is provided by me based on actual conditions and is true and complete without being affected by any third party. I/We understand that the investment products with certain risk levels available to me shall be subject to risk assessment results conducted by this CIP. I shall be responsible for and shall notify the Bank to modify or supplement any error, misrepresentation, omission or inconsistency of the information provided by me. However, the analysis and result conducted by the Bank based on the information before such modification or supplement shall remain unaffected.

I/We understand and agree that: (i) the Standard Terms & Conditions for Account Opening (the "T&Cs"), as updated from time to time, have been made available to me/us through the Bank's official website (www.sc.com/tw/) or provided in the branch before I/we entering into contractual relationship with the Bank; and (ii) the T&Cs and its amendments shall apply to all trust investments through the Bank.

Cancel

Confirm

步驟 3. 完成投資

適合度分析

→關閉此頁

→回到網路銀行

Standard Chartered 渣打銀行
繁體中文

客戶投資適合度分析

歷史分析結果

您的客戶投資適合度分析結果為「**6-非常積極型**」

生效日期: 21/09/2018 20:21

風險適合度分析結果說明

- 您尋求卓越的投資資金成長，並願意在短、中、長期承受極度的投資風險及價格波動。
- 您的投資價值可能會極度低於原始投資本金。該等級客戶也可能損失所有的原始投資本金。
- 您的風險等級結果可購買商品的風險等級為「1-保本型」、「2-保守型」、「3-穩健型」、「4-成長型」、「5-積極型」、「6-非常積極型」。

生效日期	投資適合度屬性	說明	狀態
21/09/2018 20:21	6-非常積極型	您的投資價值可能會極度低於原始投資本金。該等級客戶也可能損失所有的原始投資本金。	未到期
21/09/2018 20:21	6-非常積極型	您的投資價值可能會極度低於原始投資本金。該等級客戶也可能損失所有的原始投資本金。	未到期
21/09/2018 16:35	6-非常積極型	您的投資價值可能會極度低於原始投資本金。該等級客戶也可能損失所有的原始投資本金。	已到期
21/09/2018 16:33	6-非常積極型	您的投資價值可能會極度低於原始投資本金。該等級客戶也可能損失所有的原始投資本金。	已到期
16/09/2018 01:54	6-非常積極型	您的投資價值可能會極度低於原始投資本金。該等級客戶也可能損失所有的原始投資本金。	已到期
23/04/2018 11:17	6-非常積極型	您的投資價值可能會極度低於原始投資本金。該等級客戶也可能損失所有的原始投資本金。	已到期
28/12/2016 09:50	6-非常積極型	您的投資價值可能會極度低於原始投資本金。該等級客戶也可能損失所有的原始投資本金。	已到期
12/04/2016 13:11	4-成長型	您的投資價值可能有高度價格波動，並可能大幅低於原始投資本金。	已到期
23/03/2015 17:38	3-穩健型	您的投資價值可能會因價格波動而低於原始投資本金。若期望價格變動在中長期較為溫和，則在短期內投資損失可能較高。	已到期

關閉此頁
填寫新問卷

Copyright © 2018 渣打國際商業銀行 版權所有
線上客服 隱私權條款 約定聲明

Step3. Complete the CIP

→Close

→Return to IB

Standard Chartered
渣打銀行
ENGLISH

Customer Investment Profile

CIP Result

Your latest Customer Investment Profile result is 「3-Moderate」

生效日期: 21/09/2018 20:35

Risk Averse Conservative **Moderate** Moderately Aggressive Aggressive Very Aggressive

Investment Profile Result Description

- You seek to achieve a moderate level of capital growth on your investments and you are willing to accept moderate levels of investment risk over the medium to long term (up to 3 years).
- The value of your investments can fluctuate and may fall below your original investment. While volatility is expected to be moderate, short-term losses may be higher.
- Your Risk Profile result only match with the risk rating of 1-Risk Averse, 2-Conservative and 3-Moderate.

生效日期	投資適合度屬性	狀態
21/09/2018 20:35	3-Moderate	未到期
21/09/2018 20:21	6-Very Aggressive	已到期
21/09/2018 16:35	6-Very Aggressive	已到期
21/09/2018 16:33	6-Very Aggressive	已到期
16/09/2018 01:54	6-Very Aggressive	已到期
23/04/2018 11:17	6-Very Aggressive	已到期
28/12/2016 09:50	6-Very Aggressive	已到期
12/04/2016 13:11	4-Moderately Aggressive	已到期
23/03/2015 17:38	3-Moderate	已到期

Close
Evaluate Now

Copyright © 2018 渣打國際商業銀行 版權所有
線上寄報 隱私權條款 約定聲明