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**INDUSTRY STANDARD OF THE
PEOPLE'S REPUBLIC OF CHINA**

JR/T 0262-2022

**Investor suitability management for securities institution -
Investor rating data requirements
(English Translation)**

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What this standard covers

This standard stipulates the construction objectives and data scope of investor assessment data, the assessment caliber, data scope, and data elements of internal assessment data, and the introduction principles, assessment mechanism, and data scope of external assessment data in the investor suitability management work of securities business institutions. And the introduction of process specifications, etc., and stipulates the best practice for investors to evaluate data. This standard is applicable to the establishment of a standardized and unified investor evaluation data system by securities business institutions, and provides a data basis for the dynamic evaluation of investors' risk tolerance and risk preference. This standard does not apply to data involving state secrets.

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