

# Investment Insights Dashboard Project Documentation

## 1. Project Overview

### Objective:

Develop a comprehensive Investment Insights Dashboard using Power BI to analyze and visualize an investment dataset.

### **Role:**

Power BI Intern at Cognifyz Technologies

## 2. Tasks and Objectives

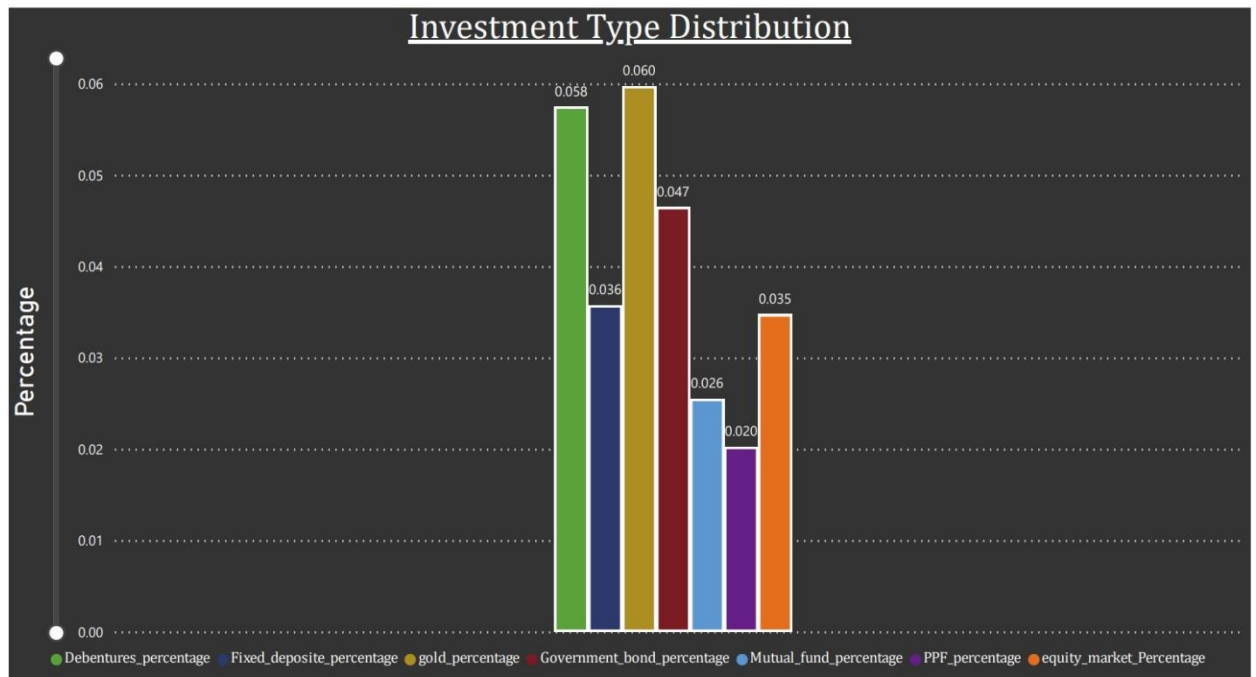
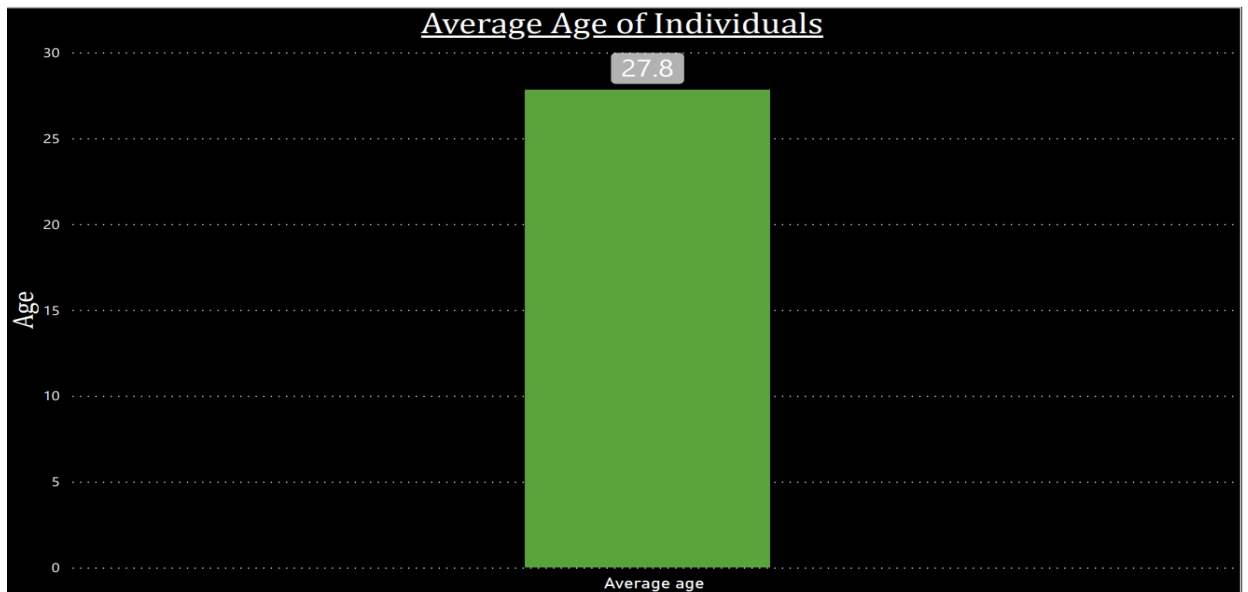
### **Task 1: Data Exploration and Summary**

#### **Objective:**

Understand the dataset's structure and derive key statistics.

#### **Steps Taken:**

1. **Data Import:** Imported the dataset into Power BI by using the "Get Data" function to ensure all necessary fields were included.
2. **Exploratory Analysis:**
  - Inspected the dataset for structure and data types.
  - Used the Power BI data view to check for any anomalies or missing values.
3. **Calculate Statistics:**
  - Computed average age, investment type percentages, and savings objectives using Power BI's DAX functions.
4. **Visualization:**



## Task 2: Gender-Based Analysis

### Objective:

Analyze and compare investment preferences by gender.

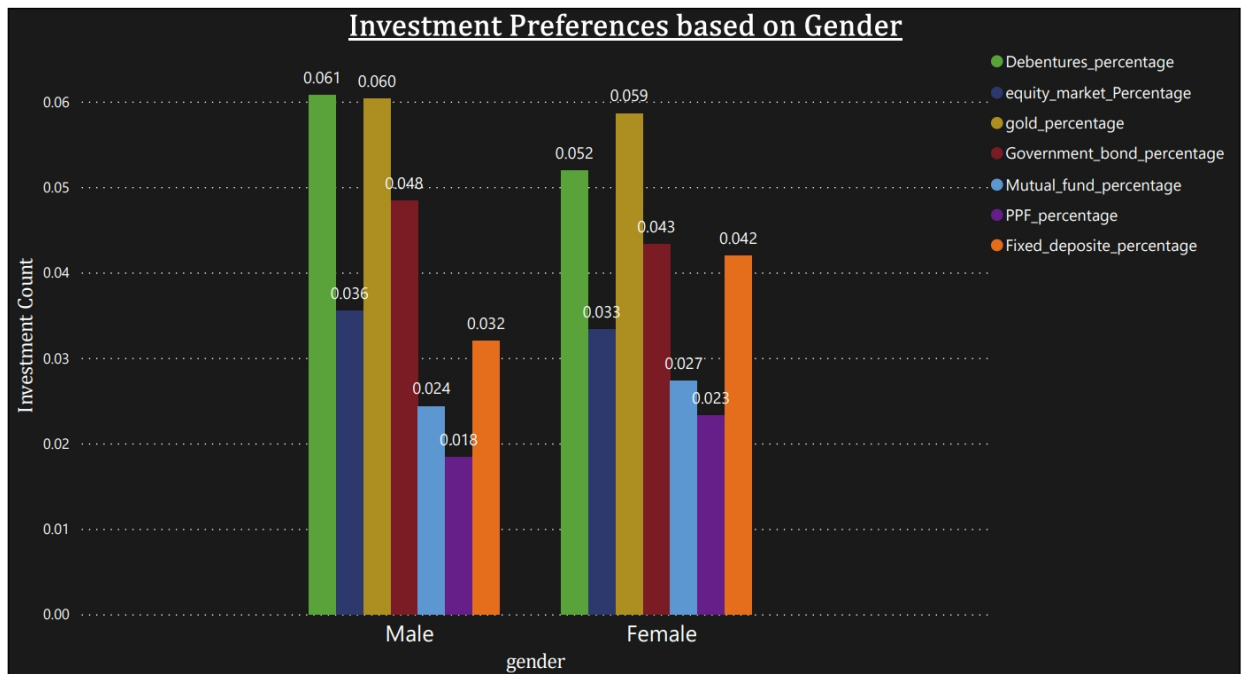
## Steps Taken:

### 5. Visual Comparison:

- Developed charts to display investment choices (equity, mutual funds, bonds) segmented by gender.
- Used Power BI's filter and slicer features to enable dynamic comparisons.

### 6. Insights:

- Analyzed the charts to identify trends and differences in investment preferences between genders.



## Task 3: Objective Analysis

### Objective:

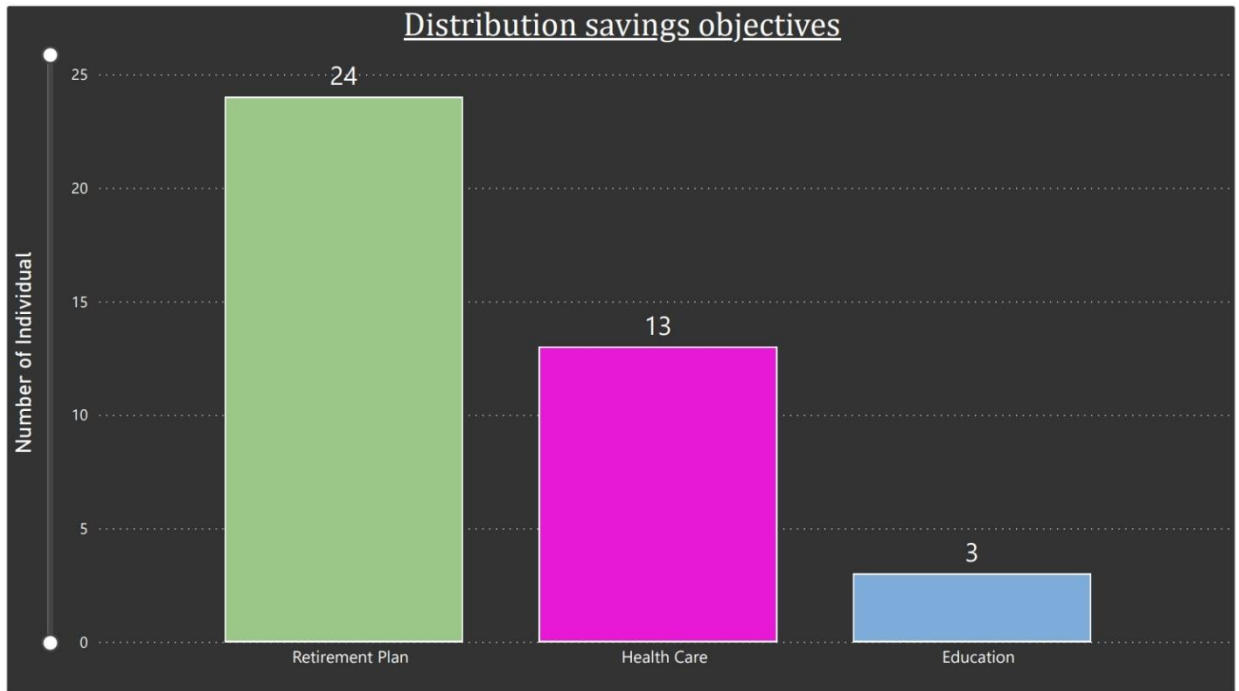
Examine the correlation between savings objectives and investment choices.

## Steps Taken:

### 7. Correlation Analysis:

- Used Power BI to perform correlation analysis between savings objectives and investment types.

### 8. Chart Creation:



#### Task 4: Investment Duration and Frequency

##### Objective:

Analyze investment durations and monitoring frequencies.

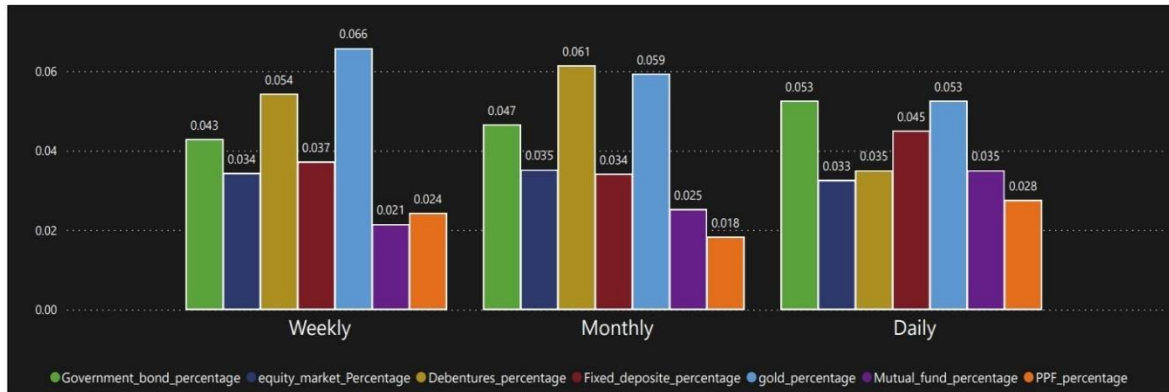
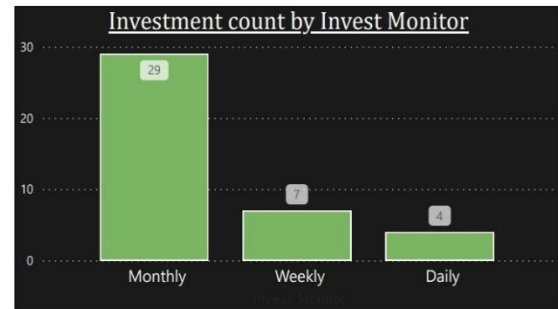
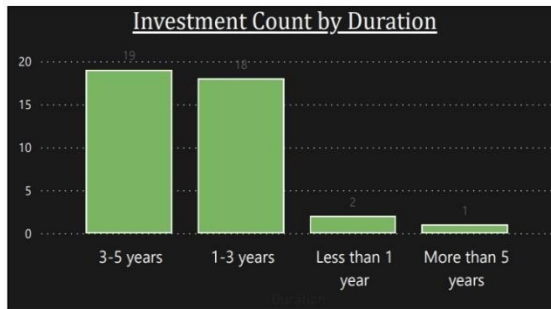
##### Steps Taken:

##### 9. Duration Distribution:

- Created histograms and bar charts to show the distribution of investment durations.
- Used Power BI's time-based visuals for better representation.

##### 10. Frequency Analysis:

- Examined how often investments are monitored and their impact on investment choices.
- Produced charts reflecting monitoring frequencies and their correlation with investment preferences.



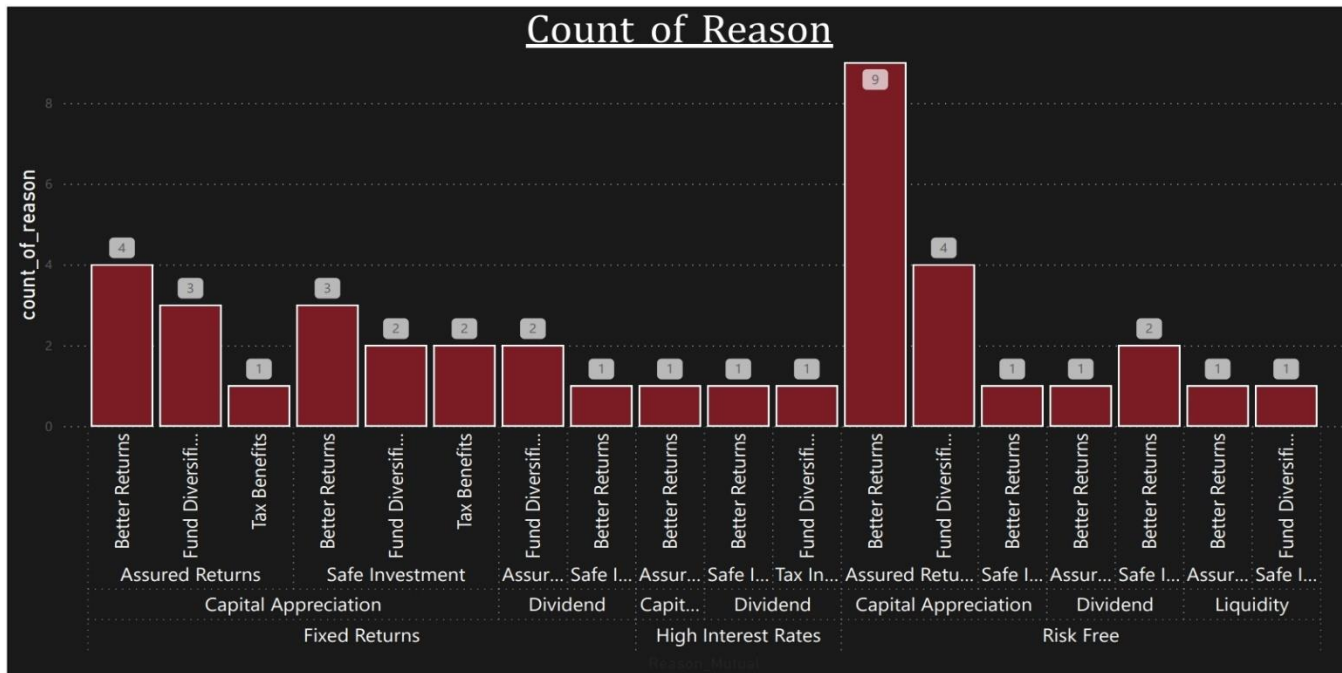
## Task 5: Reasons for Investment

### Objective:

Analyze why individuals invest.

### Steps:

11. **Trend Analysis:** Identified common trends in investment reasons (e.g., Better Returns, Tax Benefits).
12. **Visualization:**



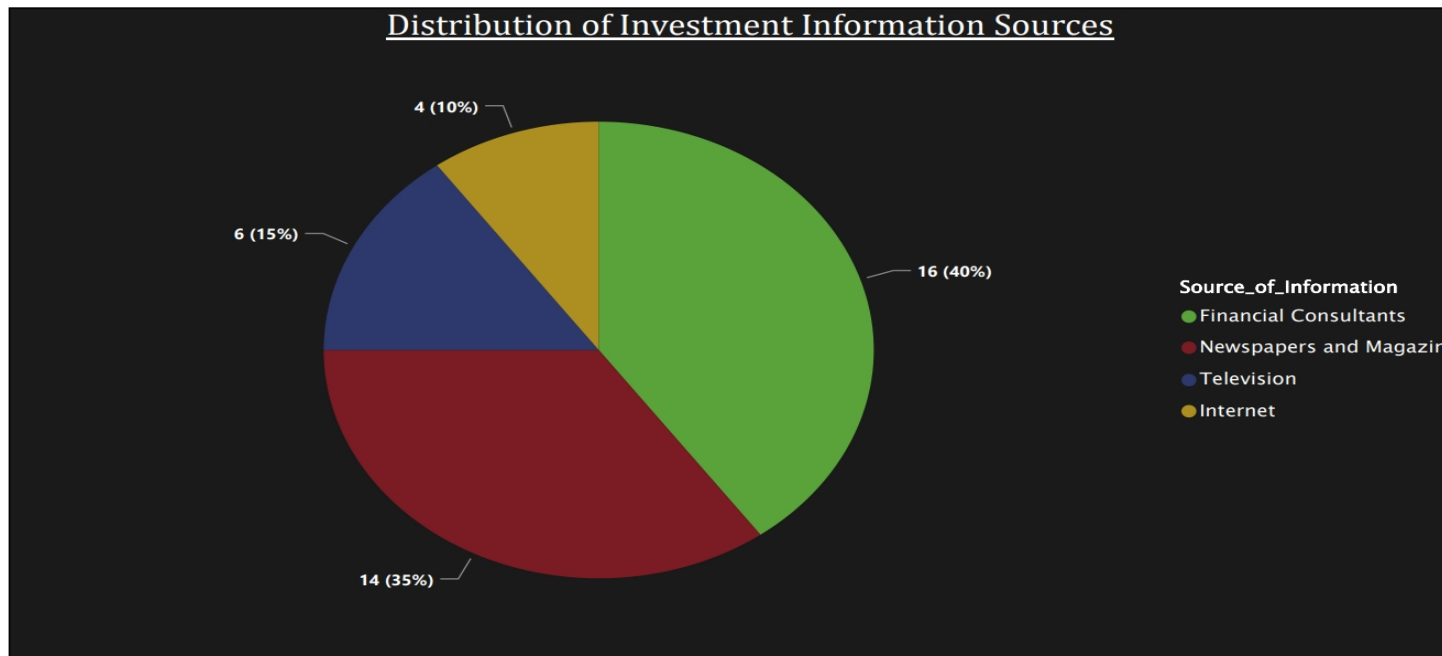
## Task 6: Source of Information

### Objective:

Analyze sources from which individuals gather investment information.

### Steps:

13. **Source Analysis:** Visualized where individuals get their investment information (e.g., Newspapers, Internet).
14. **Insight Extraction:**



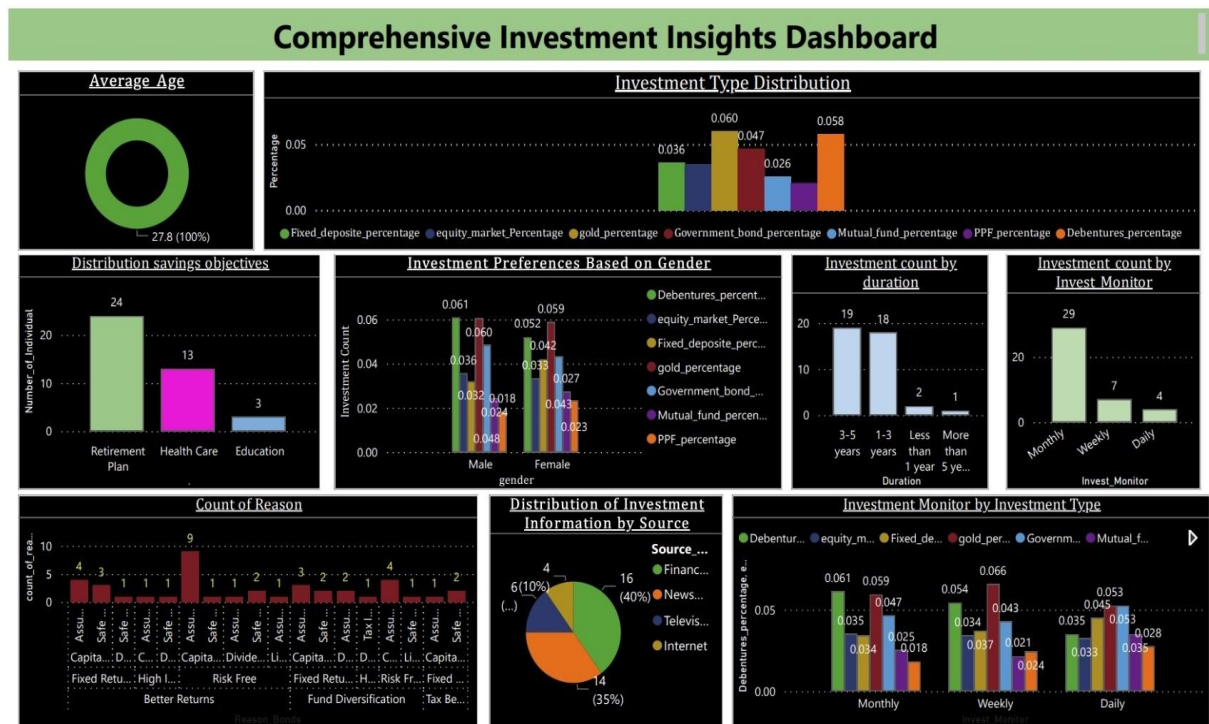
## Task 7: Combine Insights into a Dashboard

### Objective:

Create a comprehensive dashboard presenting all insights.

### Steps:

15. **Dashboard Design:** Designed an intuitive layout in Power BI.
16. **Incorporate Insights:** Included visualizations from all previous tasks.
17. **Interactivity:** Added interactive elements for data exploration.
18. **Key Findings:** Summarized major insights from the analysis.
19. **Finalization:** Polished the dashboard for a professional appearance and user-friendly experience.



### 3. Tools and Technologies

- Power BI for data visualization
- Excel/CSV for data handling and initial analysis

### 4. Skills Demonstrated

- **Data Visualization:** Advanced Power BI techniques
- **Data Analysis:** Statistical and trend analysis
- **Insight Communication:** Effective presentation of data insights

### 5. Key Learnings

- Improved skills in transforming data into actionable insights.
- Gained experience in handling real-world data projects and presenting findings to stakeholders.

- **Dataset Description:** [dataset link](#)



