TASK 1: Data Exploration and Summary

3
No Investment Avenue
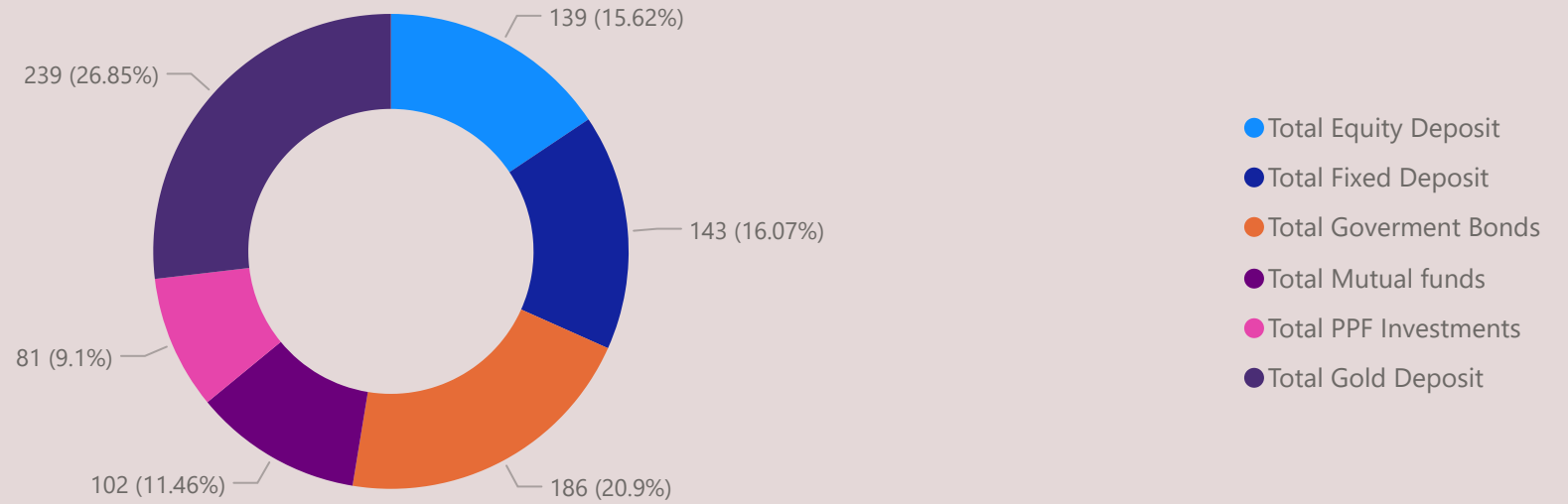
37
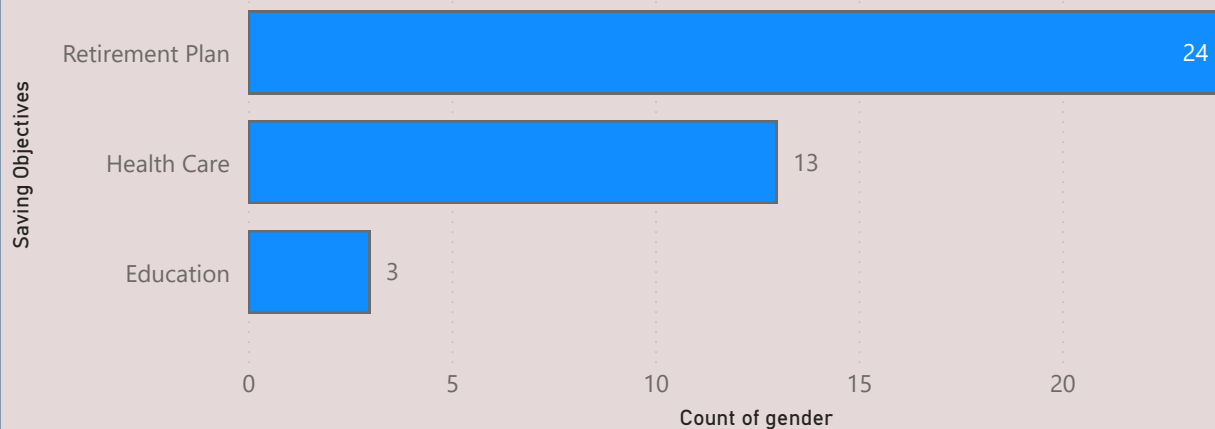Investment Avenue

27.80
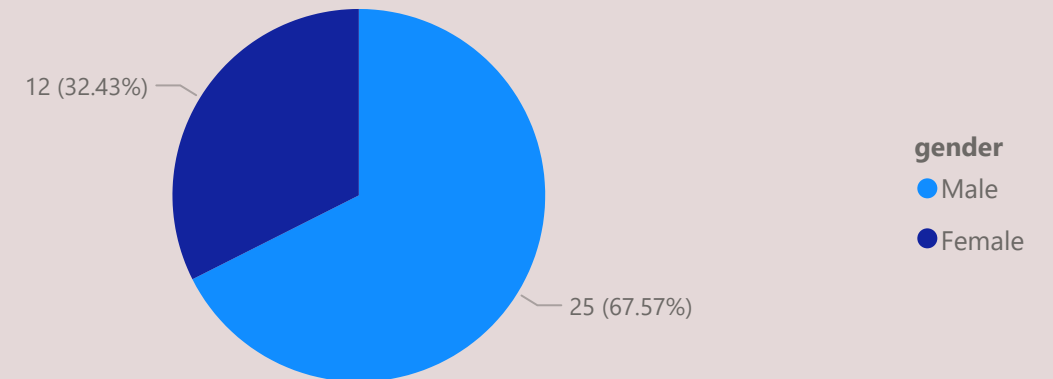Average age

Various Investments

- Total Equity Deposit
- Total Fixed Deposit
- Total Goverment Bonds
- Total Mutual funds
- Total PPF Investments
- Total Gold Deposit

139 (15.62%)
143 (16.07%)
186 (20.9%)
102 (11.46%)
81 (9.1%)
239 (26.85%)

Individuals by Savings Objective

Saving Objectives	Count of gender
Retirement Plan	24
Health Care	13
Education	3

Investment Avenue by gender

12 (32.43%)
25 (67.57%)

gender
- Male
- Female

TASK 2: Gender Based Analysis
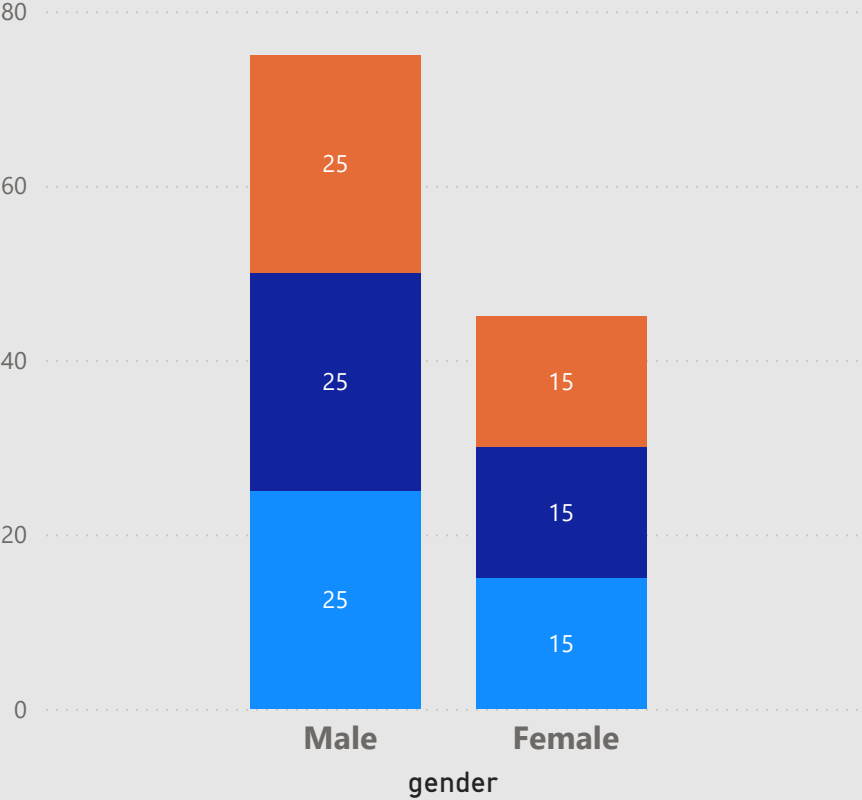
27.80
Average age

37
Investment Avenue
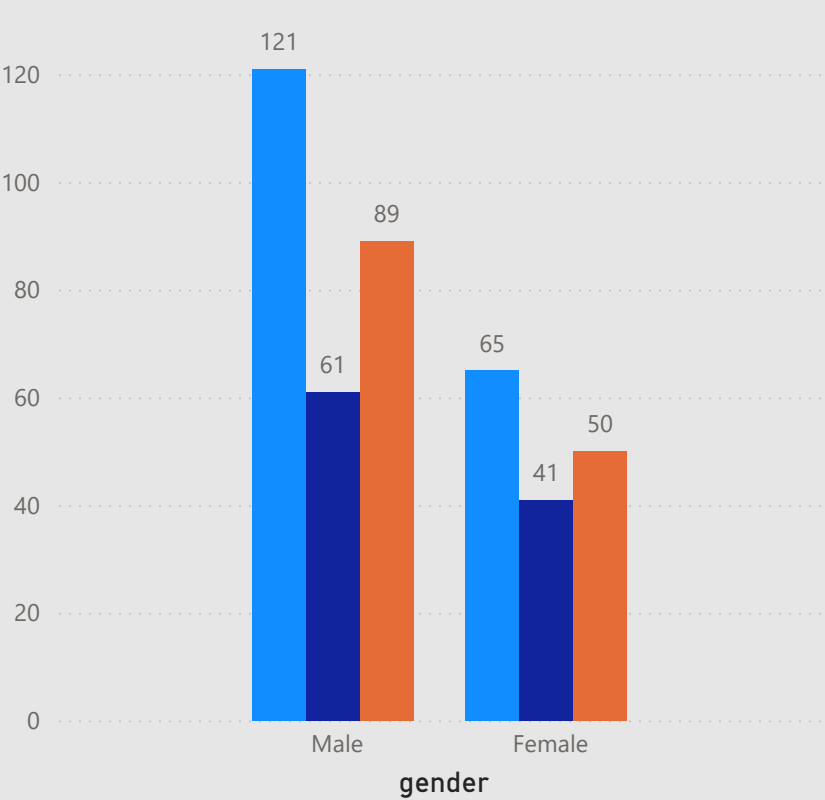
3
No Investment Avenue

No. of Male and Female investors in each investment category

- Mutual_Funds ● Government_Bonds ● Equity_Market

Gender Based preferences in investment preferences

- Government_Bonds ● Mutual_Funds ● Equity_Market

Key Insights:

- **Equity Investments**: More male investors preferred equity markets compared to female investors

- **Mutual Funds:** Mutual funds had a balanced preference among both genders showing a slight tilt towards male investors.

- **Government Bonds**: Female investors showed a higher preference for government bonds compared to male investors.

TASK 3 : Objective Analysis

-1

Pearson Correlation

Avenue

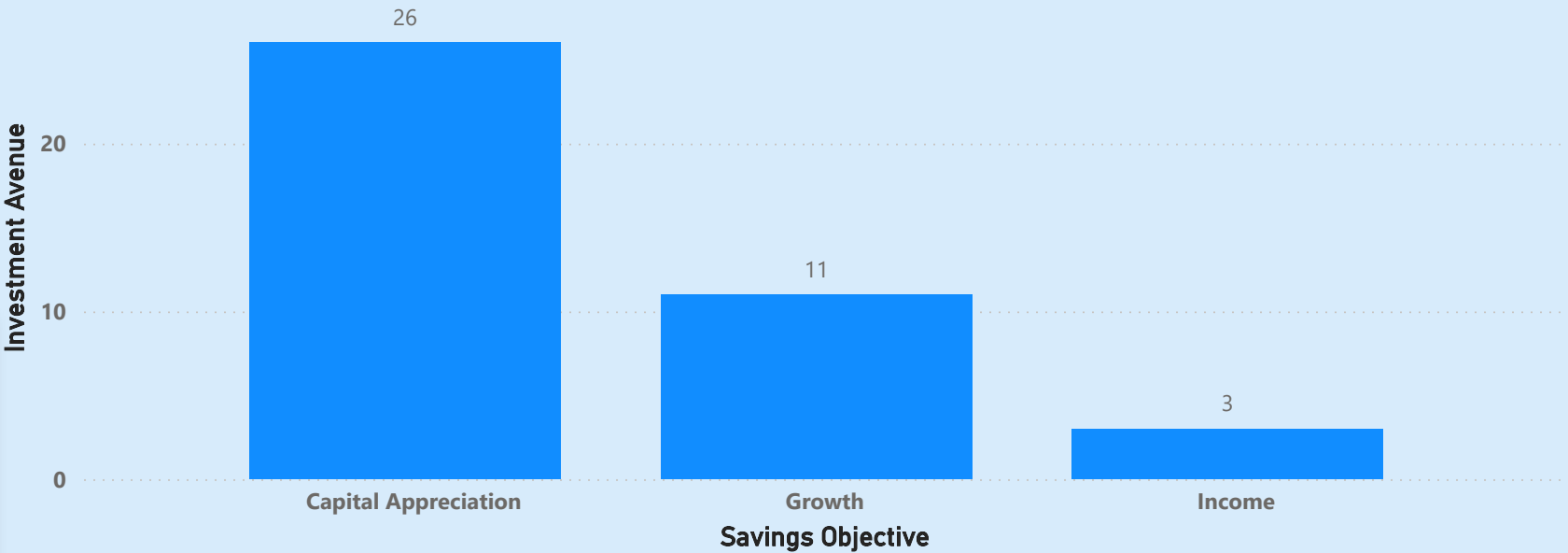| Equity	Mutual Fund
Fixed Deposits	**Public Provident Fund**

Investment Avenue by Savings Objective

Insights :

Capital Appreciation:
Strongly correlated with equity investments.

Retirement Planning:
Shows a balanced preference across mutual funds and government bonds.

Healthcare Savings:
Higher inclination towards secure investment like government bonds.
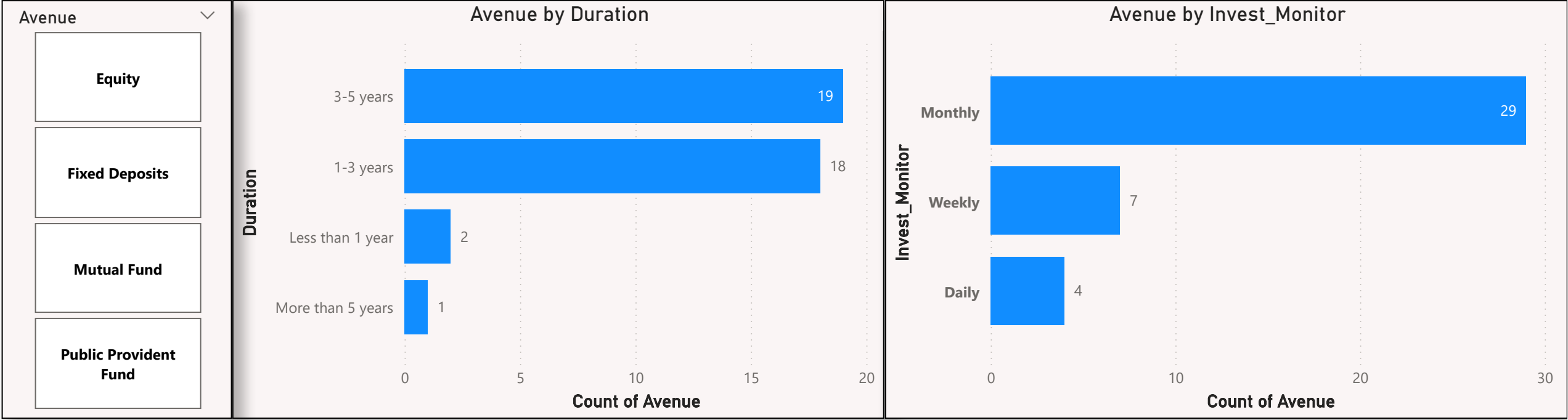
TASK 4 : Investment Duration and Frequency

9	**3**	**10**	**18**
Fixed_deposit	**Public Provident Fund**	**Equity**	**Mutual funds**

Avenue

- Equity
- Fixed Deposits
- Mutual Fund
- Public Provident Fund

Avenue by Duration

Duration	Count of Avenue
3-5 years	19
1-3 years	18
Less than 1 year	2
More than 5 years	1

Avenue by Invest_Monitor

Invest_Monitor	Count of Avenue
Monthly	29
Weekly	7
Daily	4

Insights:

- **Investment Avenues:** The most popular choice among investors is Mutual Funds (18).Followed by Equity(10),Fixed Deposits(9),and Public Provident Fund(3).

- **Investment Duration:** A significant portion of investors prefer medium term investments with 3-5 years being the most common duration (19 investors).followed by 1-3 years(18 investors).Short-Term investments(less than 1 year) and long-term investments(more than 5 years)are less preferred.

- **Investment Monitoring Frequency :** Most monitor their investments on a monthly basis (29),whereas weekly(7) and daily monitoring(4) are less common.
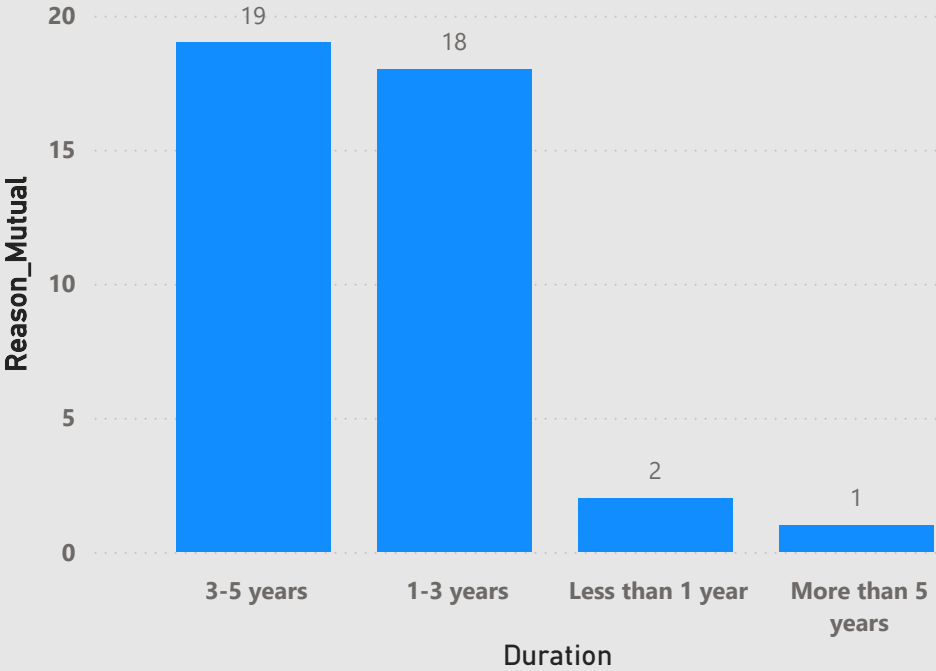
TASK 5: Reasons of Investment
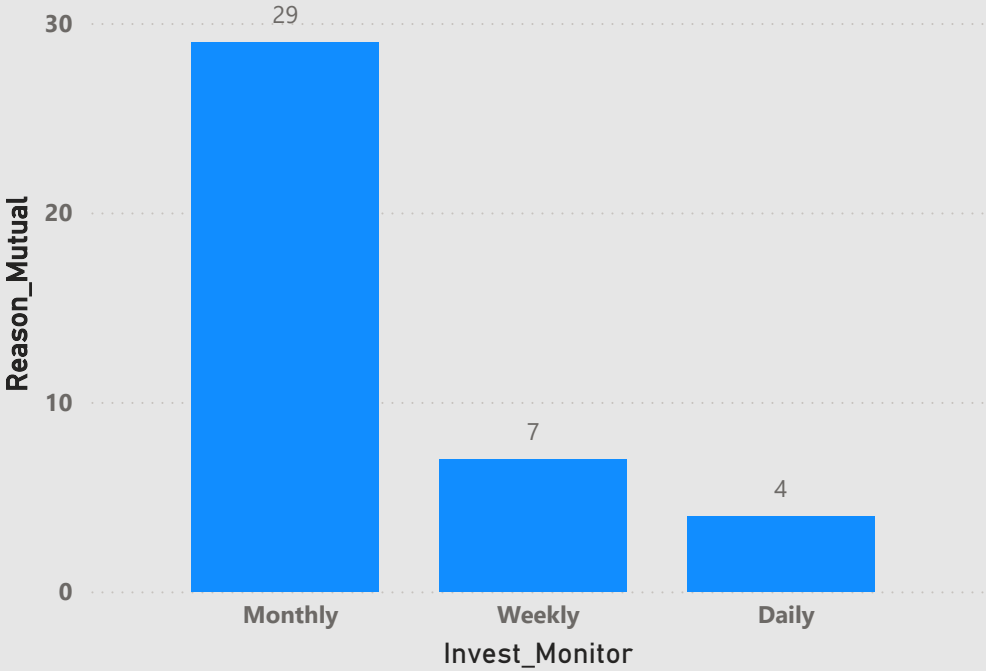
Reason_Mutual ⌄

| Better Returns | Fund Diversification | Tax Benefits |

Reason Mutual by Duration

Bar chart values:
- 3-5 years: 19
- 1-3 years: 18
- Less than 1 year: 2
- More than 5 years: 1

Reason Mutual by invest_monitor

Bar chart values:
- Monthly: 29
- Weekly: 7
- Daily: 4

13 Fund Diversification

24 Better Returns

3 Tax Benefits

Insights:

Better Returns is the dominant reason for investment indicating that investors are primarily motivated by high potential gains.

Fund Diversification is also a significant reason, suggesting that investors are interested in spreading their risks across various assets.

Tax benefits is the leas common reason implying it is not a primary motivator for most investors in the dataset.

Investment Duration : The majority of investments ,regardless of reason, are held for 3-5 years.

Monitoring Frequency: Most investors prefer to monitor their investments monthly ,indicating a preference for regular but not overly frequent oversight.

TASK 6 : Source of Information

Source ∨

- Financial Consultants
- Internet
- Newspapers and Magazines
- Television

Avenue by Source

Source	Avenue
Financial Consultants	16
Newspapers and Magazines	14
Television	6
Internet	4

Source by Avenue

Avenue	Source
Mutual Fund	18
Equity	10
Fixed Deposits	9
Public Provident Fund	3

TASK 7 : Final Dashboard

Avenue

- Equity
- Fixed Deposits
- Mutual Fund
- Public Provident Fund

27.80 Average age

25 Male

15 Female

Reason_Mutual

- Better Returns
- Fund Diversification
- Tax Benefits

Investment Avenue by gender

12 (32.43%)

25 (67.57%)

gender
- Male
- Female

Gender by savings objectives

3 (7.5%)

13 (32.5%)

24 (60%)

savings object...
- Retirement ...
- Health Care
- Education

Sum of Equity_Market, Sum of Government_Bonds and Sum of Mutual_Funds by gender

- Sum of Equity_Market
- Sum of Government_Bo...
- Sum of Mutual_F...

gender — Male, Female

Objective by Avenue

Avenue:
- Mutual Fu...
- Equity
- Fixed Dep...
- Public Pro...

Objective: 0 — 10 — 20

Avenue by Source

Source:
- Financial ...
- Newspap...
- Television
- Internet

Avenue: 0 — 10 — 20

Avenue by Duration

Duration: 3-5 years, 1-3 years, Less than 1 year, More than 5 years

Avenue by Invest_Monitor

Invest_Monitor: Monthly, Weekly, Daily