



MUTUAL FUND INVESTMENT

RECOMENDATION
BASED
ON
CUSTOMER
RISK PROFILE

Capital Market Investors

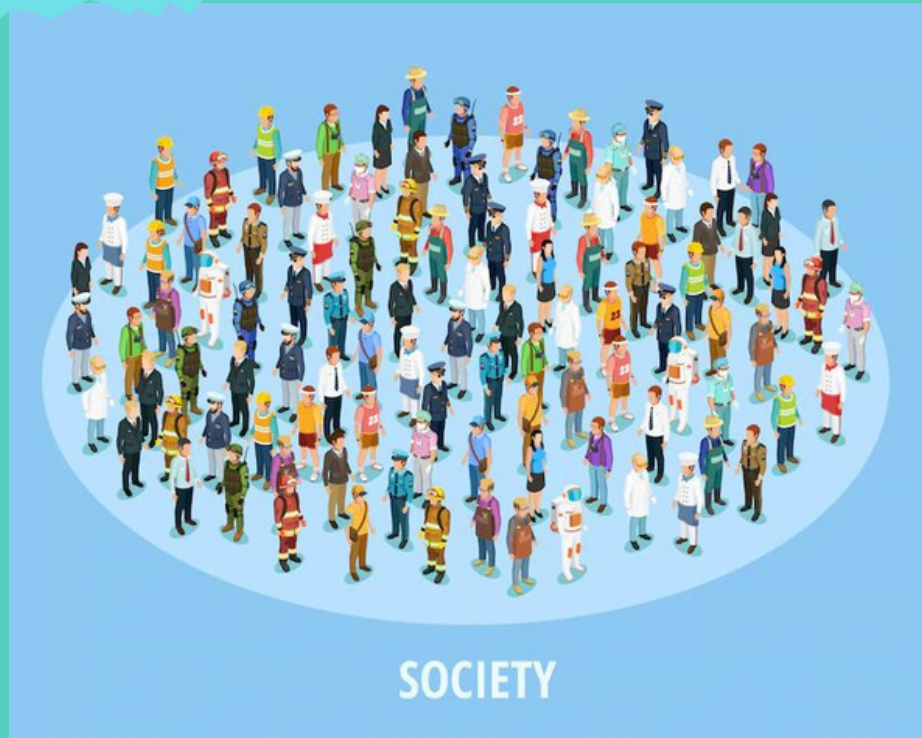
10M

source :

<https://dataindonesia.id/bursa-keuangan/detail/jumlah-investor-pasar-modal-tembus-1015-juta-pada-november-2022>



INVESTMENT



Interest :
Prepare their financial
future

Problems :

- Limited Knowledge
- Limited Time for Learning and Analysis
- Fear of loss



RISK

Fundamental
Knowledge



ANMINVE\$TING



Aan
Nurliyanah



Ajeng
Nilta Adriani



Fachmi
Maris



Muhammad
Fawwaz
Dynoeputra

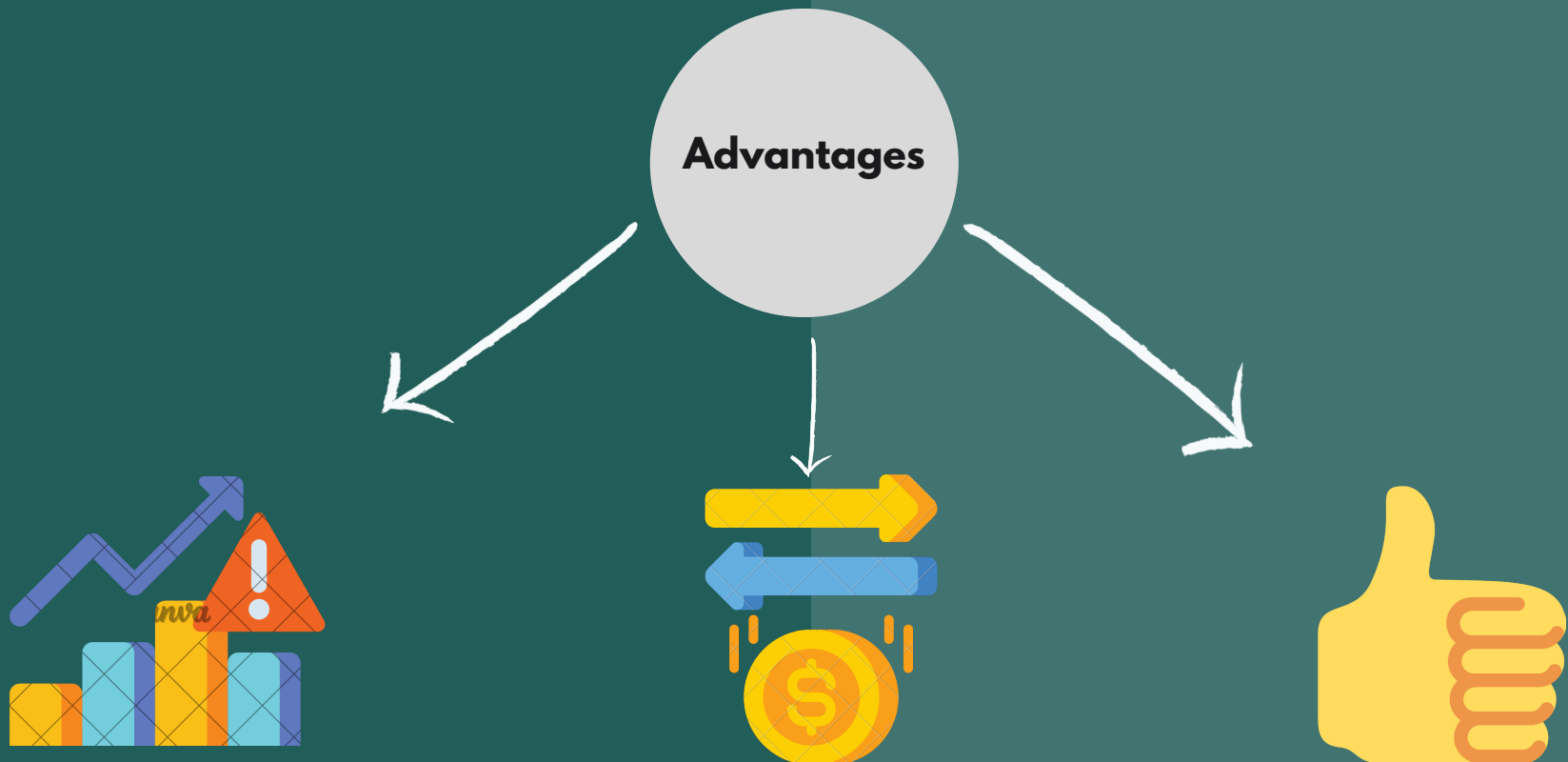


Ropiudin



MUTUAL FUND

A vehicle through which funds from the general public are collected and invested in a portfolio by the Investment Manager.



PROBLEM STATEMENT



Give A Mutual Fund Recommendation
Based On Customer Risk Profile

**CANDIDATE
INVESTORS**

**ACKNOWLEDGE
RISK**

**CHOOSE
PRODUCTS**



ANMINVE\$TING Workflow



PHASE 1

Dataset gathering
based on a
customer
questionnaire



PHASE 2

Classifying
Customer by their
Risk Profile



PHASE 3

Mutual Fund
Recommendation
based on
Classification



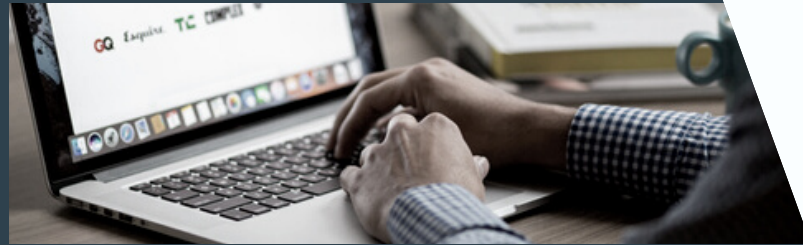
PHASE 4

Show Future
Predictions

DATASET

The dataset consists of 10.000 data based on a customer questionnaire

- 1.Age
- 2.Expenses
- 3.Financial Status
- 4.Experience
- 5.Estimated Period
- 6.Unwilling to Accept
- 7.Scenario
- 8.Sum Score (Target)
- 9.Salary





**Risk Profile
Classification**

1 (Very Cautious)

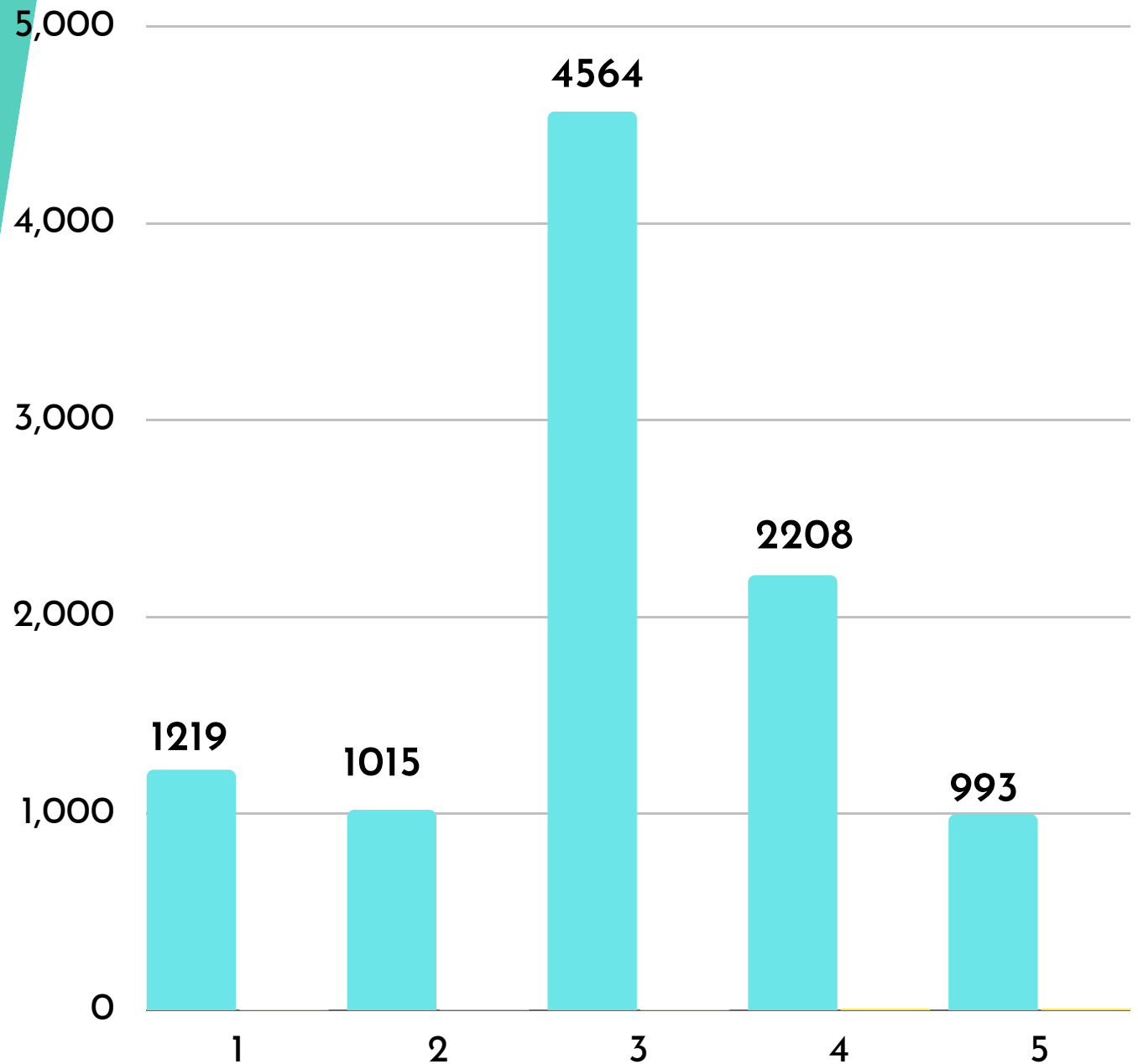
2 (Cautious)

3 (Balanced)

4 (Adventurous)

5 (Speculative)

Data of Risk Profile Classification



Type of Mutual Fund Recommendations



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graph TD; A[Type of Mutual Fund Recommendations] --> B[Money Market]; A --> C[Fixed Income]; A --> D[Balanced Fund]; A --> E[Equity Fund];
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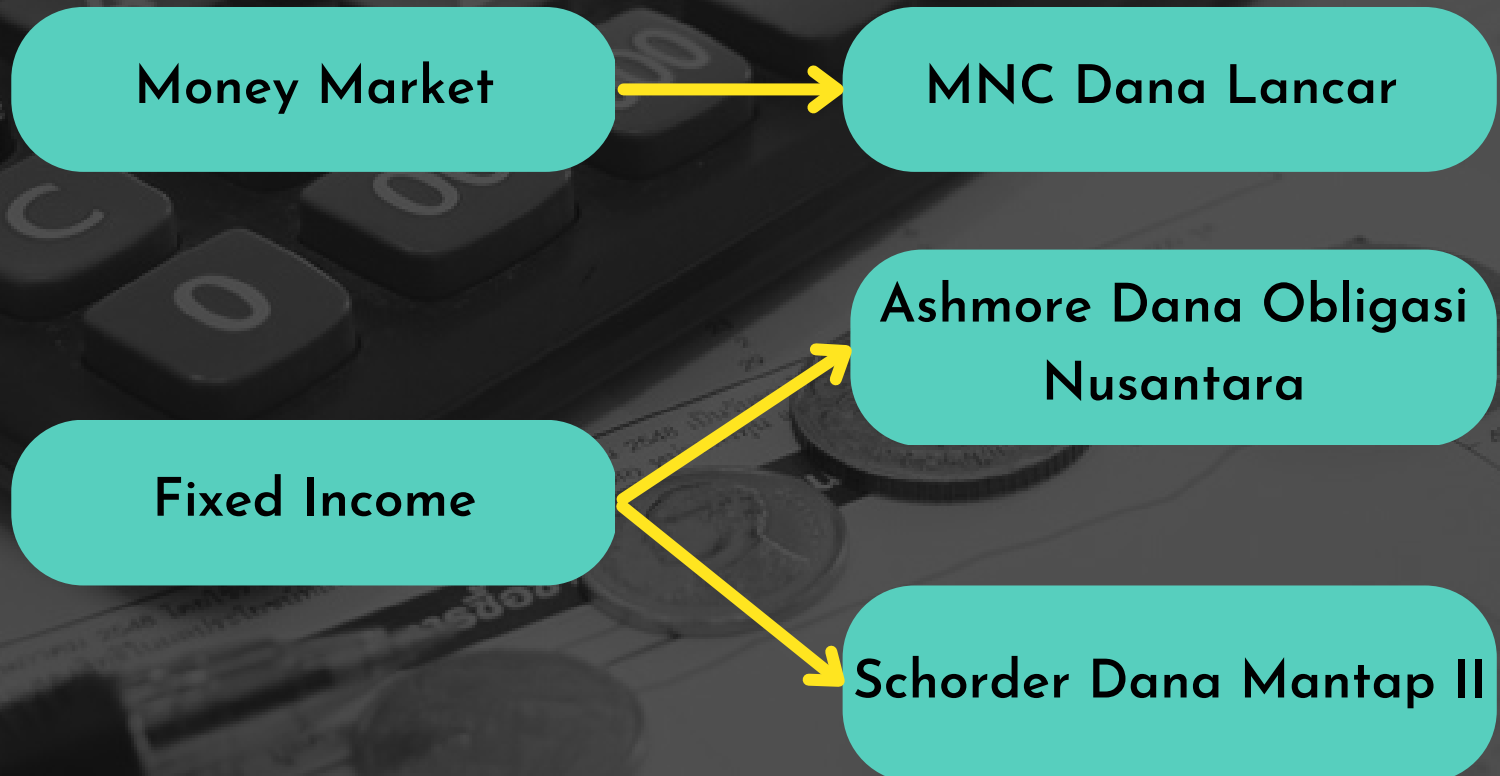
Money Market

Fixed Income

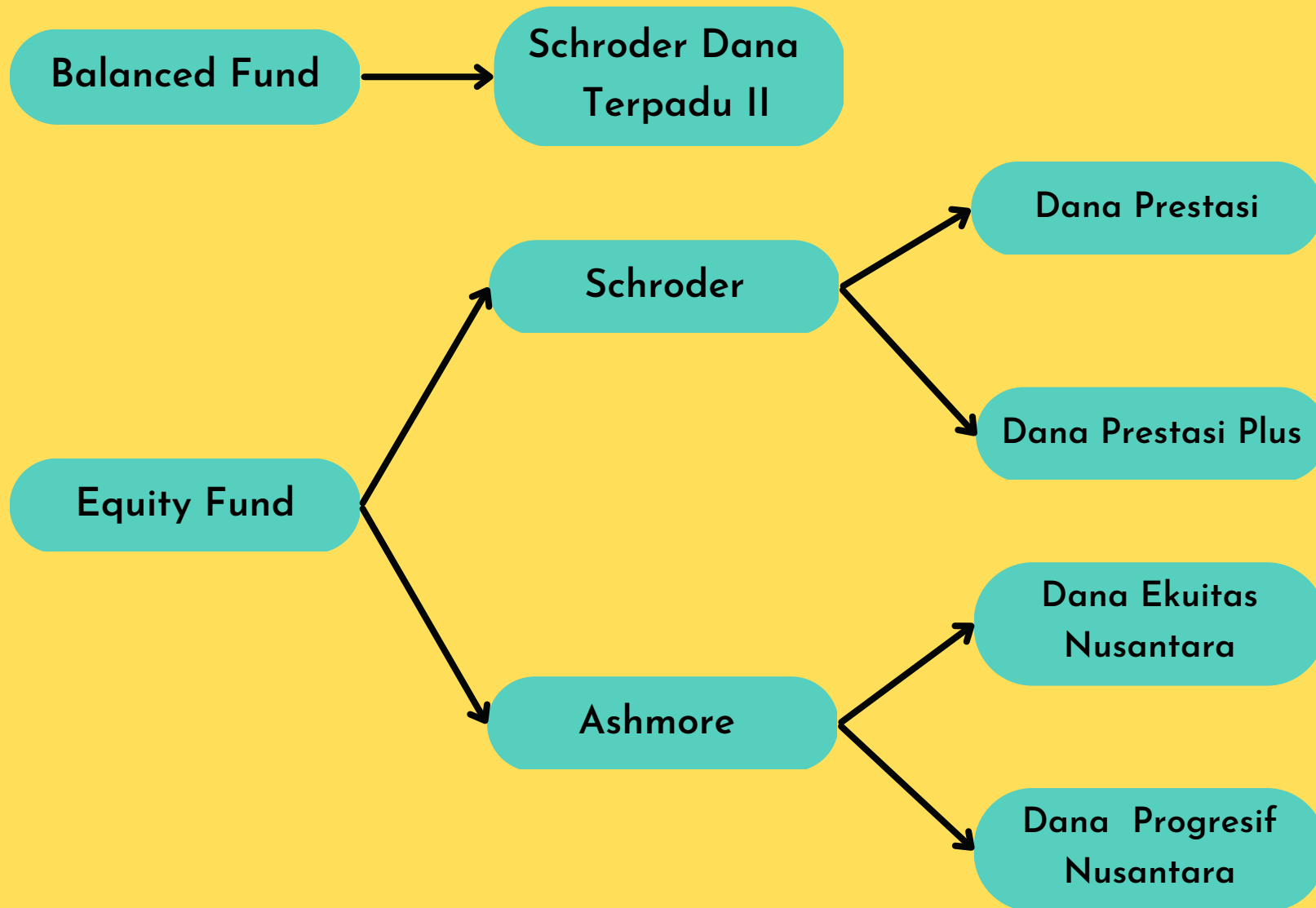
Balanced Fund

Equity Fund

Mutual Fund Recommendation based on Classification Result



Mutual Fund Recommendation based on Classification Report






**Selected
Product**



**Price
Forecasting**



Navigation Bar

 [Find your Risk Profile](#)

 [What is Mutual Funds?](#)

Anminve\$ting

How are you investing today?



Conclusion

Advantages

Limitation

Future
Improvement





Thank You

FOR YOUR ATTENTION

ANMINVE\$TING