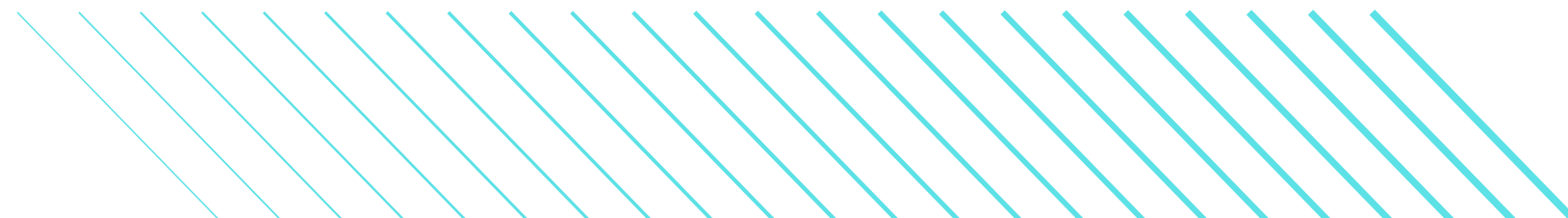
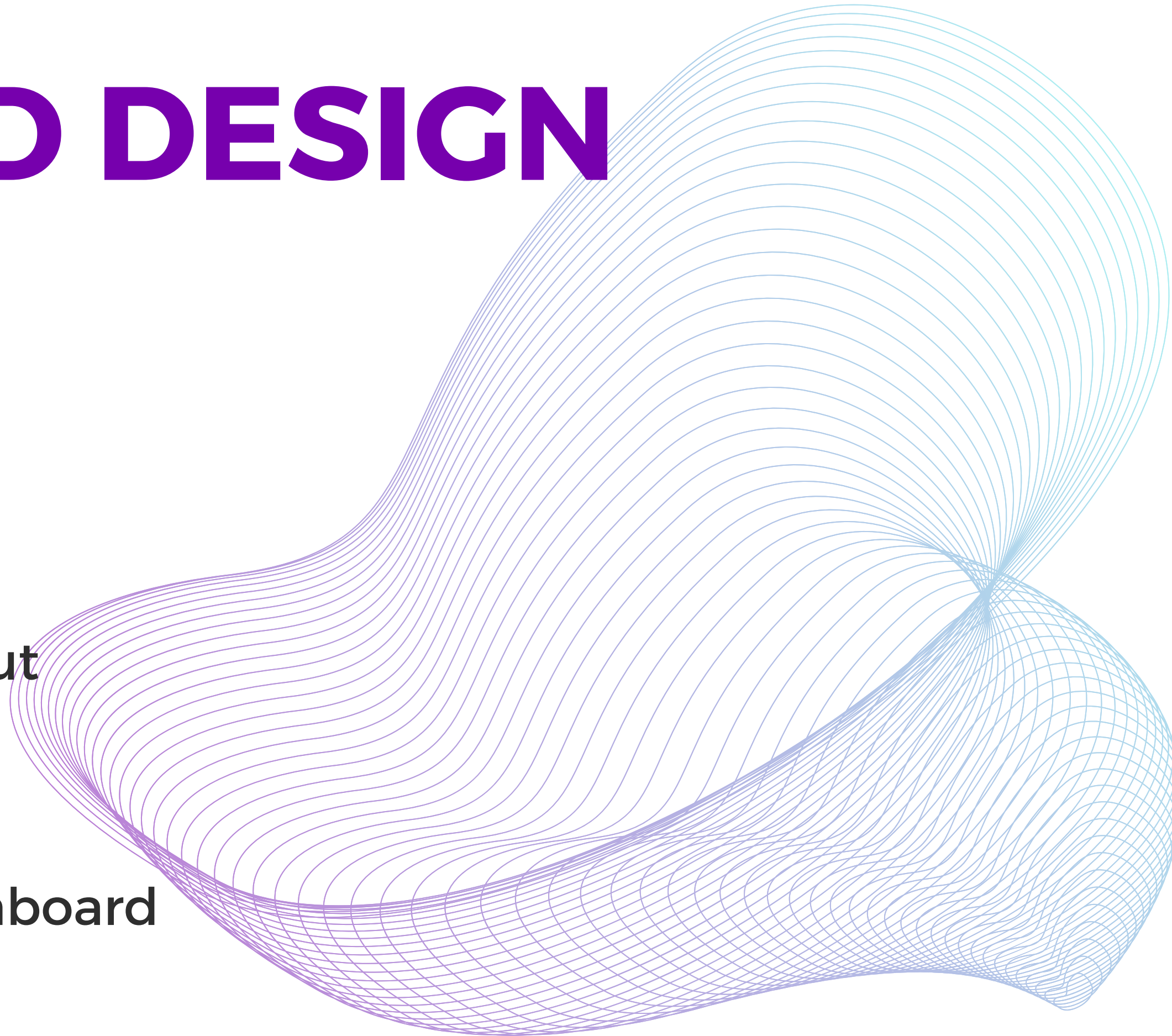


# Dashboard Creation for **FINANCE AND INVESTMENT** Purpose



# DASHBOARD DESIGN

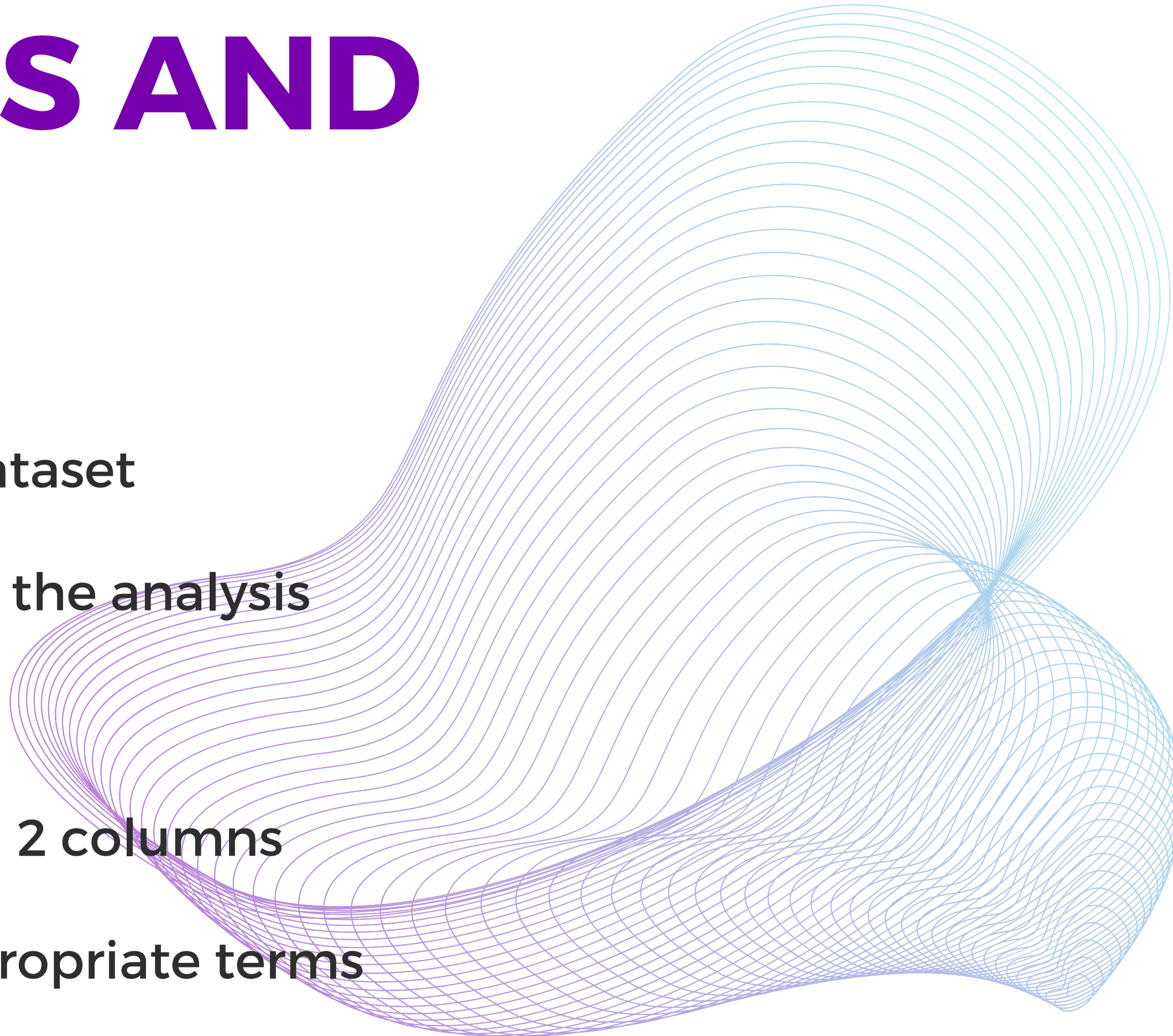
- Understanding the dataset
- Analyzing different factors
- Deciding on the key factors
- Creating the dashboard layout
- Adding interactive features
- Testing and refining the dashboard





# CHALLENGES AND SOLUTIONS

- Understanding the audience
- Understanding KPIs of the dataset
- Amount to be considered for the analysis
- Scaling of the graphs
- Dynamic pivot table by using 2 columns
- Naming the graphs with appropriate terms



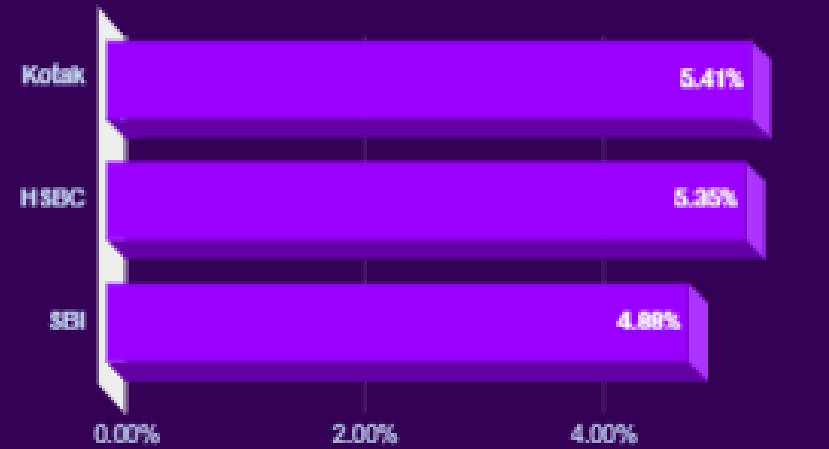
# FINANCE AND INVESTMENT DASHBOARD

## STATIC ANALYSIS

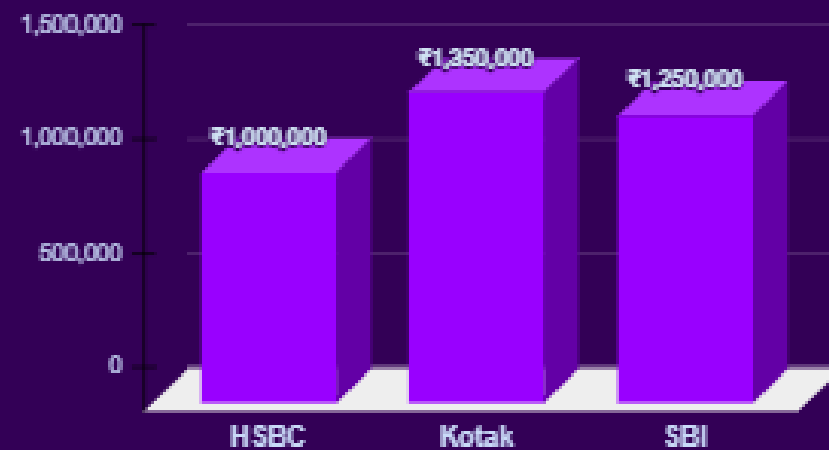
TOTAL BANKS

3

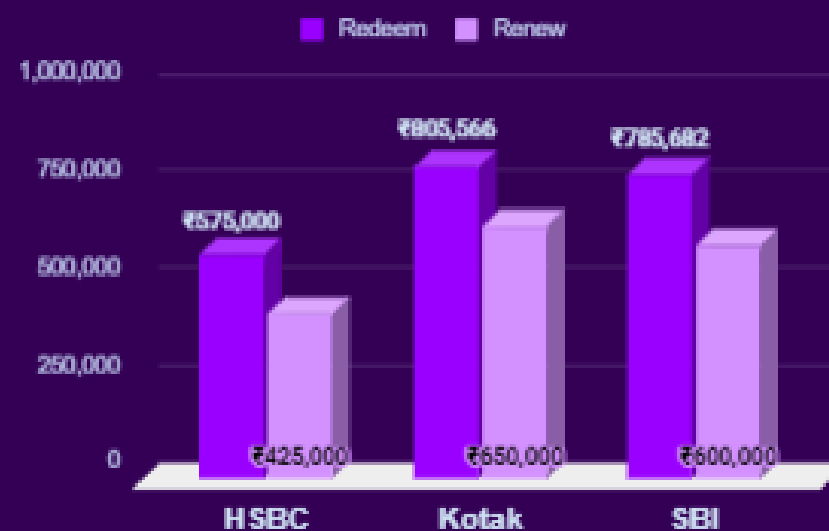
AVERAGE of ROI vs. Bank



SUM of Capital vs. Bank



Redeem and Renew



## DYNAMIC ANALYSIS

### FUND REQUIREMENT ANALYSIS

Upcoming Month

₹82,904

Next 2 Months

₹135,695

Next 3 Months

₹195,195

QUARTER

All

MONTH

Feb

YEAR

All

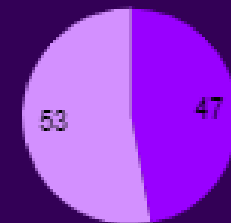
YEARLY

BANK

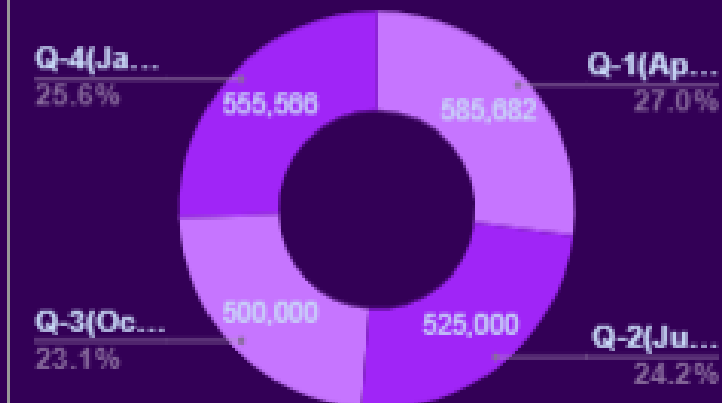
All

COUNTA of FDs per principal

25,000 50,000



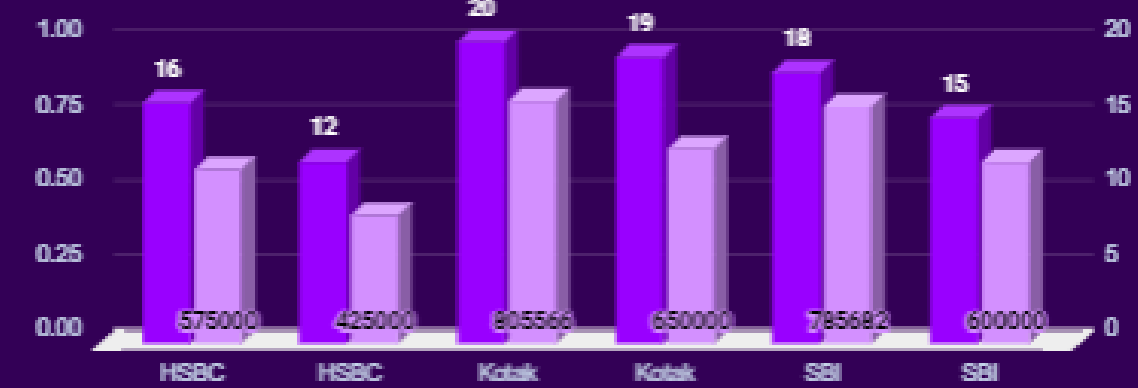
Amount to be Redeemed vs Quarter



Redeem and Renew vs Bank

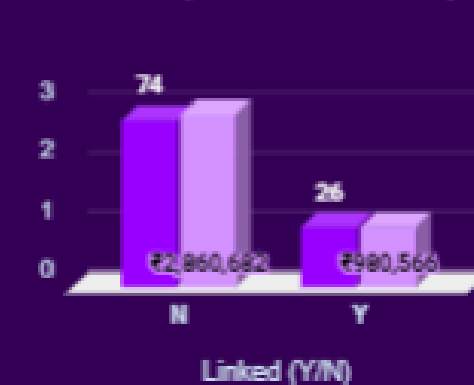
count Scheme sum Capital

Scale: 1 Unit = 10 L



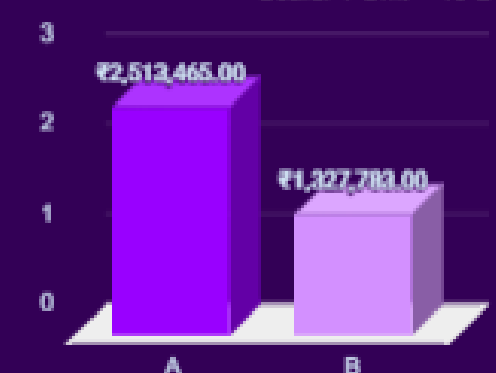
Scale: 1Unit = 10L

COUNT of Capital SUM of Capital



Nominee vs Capital

Scale: 1 Unit = 10 L



Maturity Date	Year	Maturity Amount	Bank	Principal	ROI
10/03/23	2023	52,783	Kotak	50,000	4.10%
20/03/23	2023	52,783	SBI	50,000	3.30%
30/03/23	2023	30,116	Kotak	25,000	7.60%
09/04/23	2023	52,783	SBI	50,000	5.10%
21/04/23	2023	30,116	HSBC	25,000	6.25%
03/05/23	2023	60,228	HSBC	50,000	6.25%
15/05/23	2023	52,783	Kotak	50,000	5.10%
27/05/23	2023	30,116	SBI	25,000	4.30%
09/06/23	2023	52,785	Kotak	50,000	3.10%

**THANK  
YOU :)**

**ANY FEEDBACKS ARE WELCOMED!!**

