Customer Financial Insights Dashboard!!!

Unlock key financial metrics, customer behavior trends and lending data.

Time Period

All

Account Type

All

Customer Segment

All

Loan & Credit Analysis

Deposit Analysis

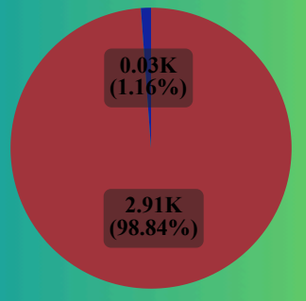
Customer Segmentation & Risk

Summary

Total Client	Total Loan	Total Deposit	Checking Accounts
2913	1.77bn	2.01bn	963.28M

Savings Accounts	Business Lending	Total Estimated Income	Avg. Credit Card Utilizatioon
698.73M	2.60bn	513.92M	6.51M

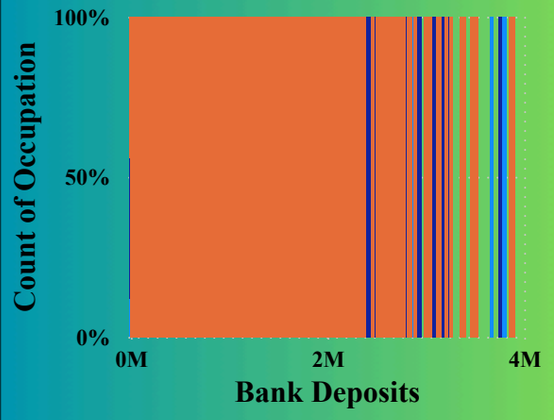
Account Type Distribution



Account… Multi-Account Foreign Currency

Bank Deposit By Occupation

Custo… High Valu… Mid Value Others



Correlation Matrix

Feature A	Bank Depo
Bank Deposits	
Bank Loans	
Checking Accounts	
Credit Card Balance	
Estimated Income	
Foreign Currency Account	
Saving Accounts	
Superannuation Savings	
Total	

Home | Loan & Credit Analysis | Deposit Analysis | Customer Segmentation & Risk | Summary | Qtr 1 | Qtr 2 | Qtr 3 | Qtr 4

Banking Relationship: Comercial | Institutional | Private Bank | Retail

Gender: Female | Male

Institutional Advisor: All

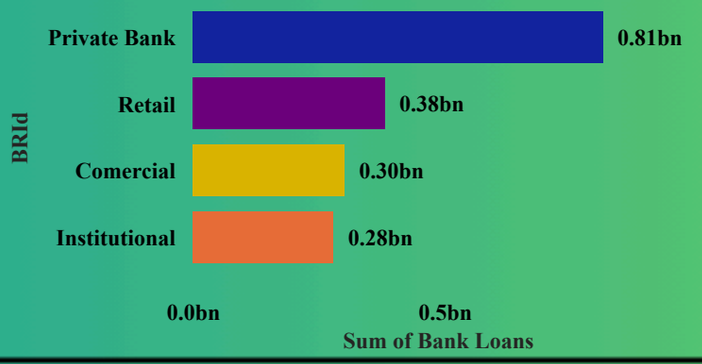
Total Loan
3000

Bank Loan
5.32T

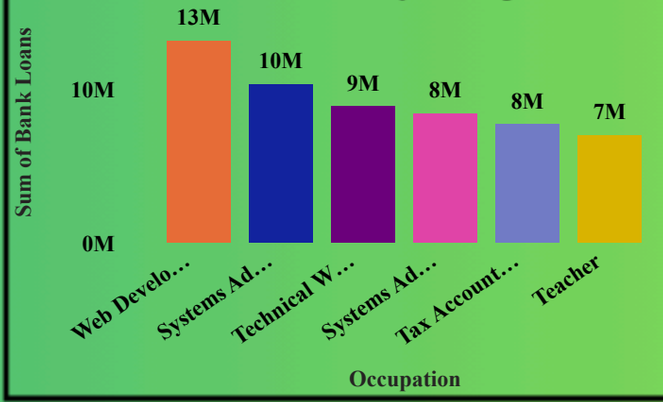
Business lending
7.80T

CC Balance
28.59...

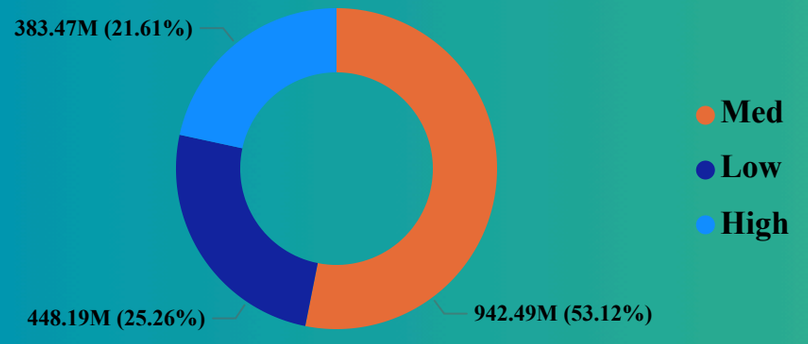
Bank Loan By BR



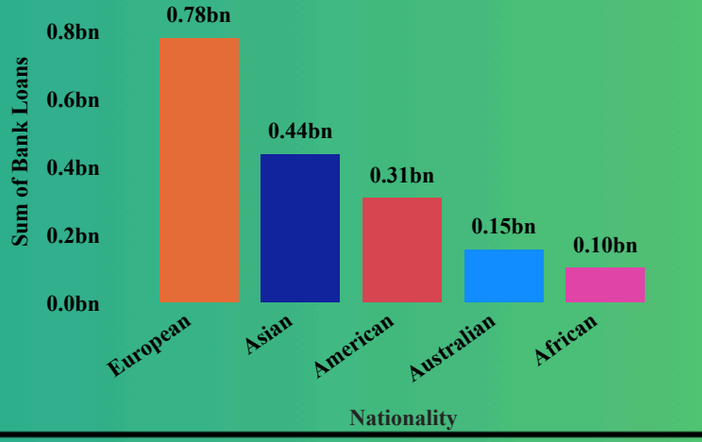
Loan Distribution by Occupation



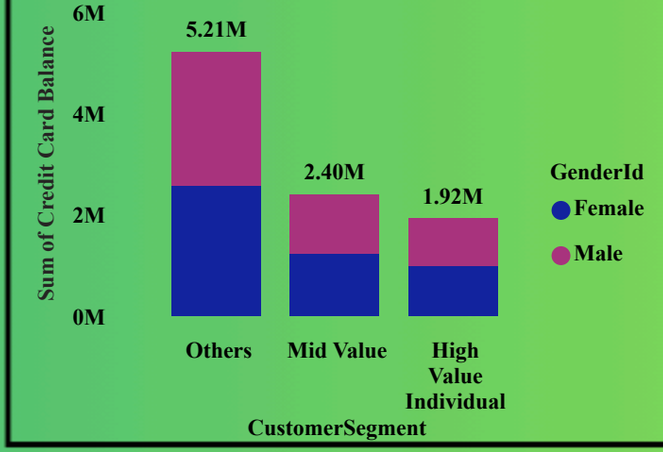
Bank Loan By Income Band



Bank Loan By Nationality



Credit Card Balance by Customer Segment



Home | Loan & Credit Analysis | **Deposit Analysis** | Customer Segmentation & Risk | Summary | Qtr 1 | Qtr 2 | Qtr 3 | Qtr 4

Account Type

Foreign Currency | Multi-Account

Loyalty Classification

Gold | Jade | Platinum | Silver

Age Band

All

Total Deposit

2.01bn

Bank Deposit

3000

Foriegn Currency Amt

89.65M

Avg. Deposit per Client

2.06bn

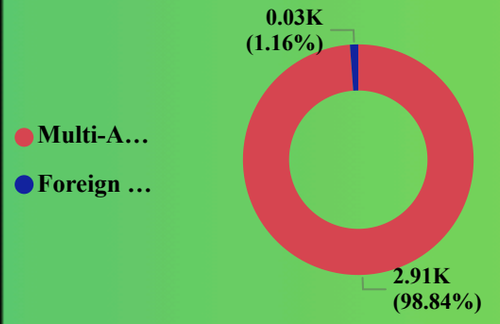
Saving Account Amt

698.73M

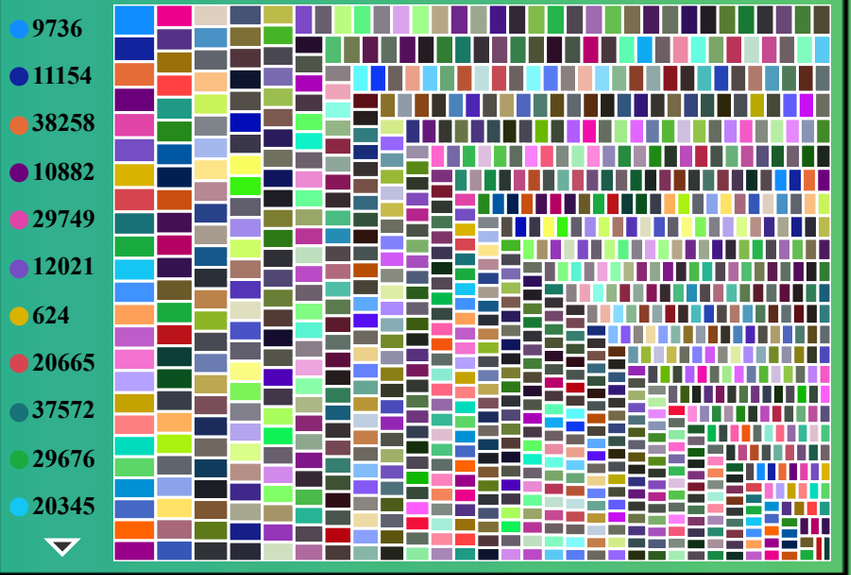
Checking Account Amt

963.28M

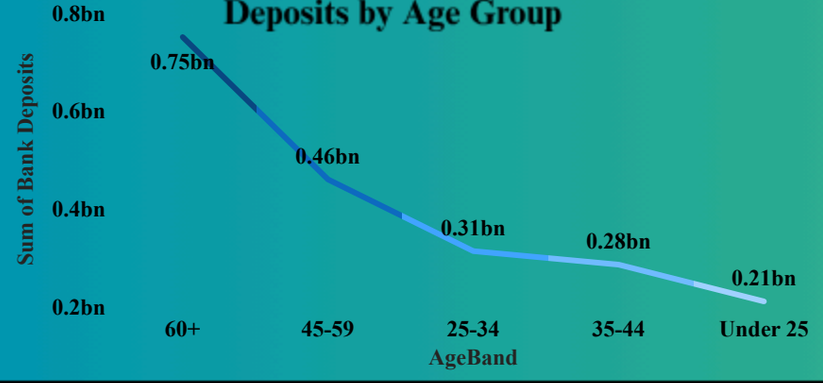
Deposits by Account Type



Deposits by Region



Deposits by Age Group



Deposits by Loyalty Tier

Home | Loan & Credit Analysis | Deposit Analysis | **Customer Segmentation & Risk** | Summary

Female | Male

Loyalty Classification

Gold | Jade | Platinum | Silver

Occupation

All

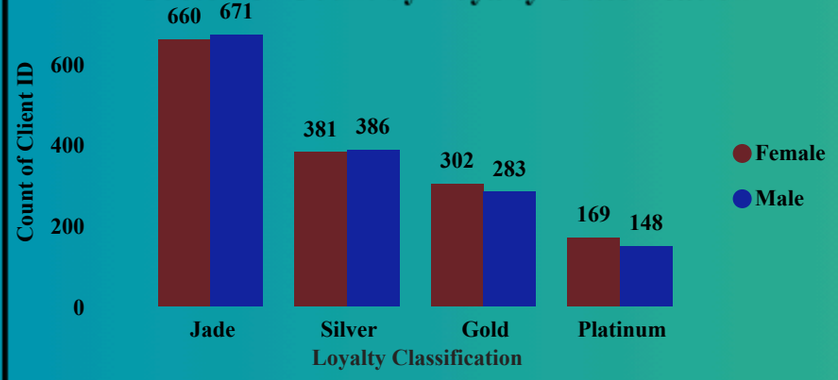
Age Band

All

Properties Owned

1 Property | 2 Properties | 3+ Properties | No Property

Customer Count by Loyalty Classification



Total Clients

9M

Avg. Risk Weighting

6.75K

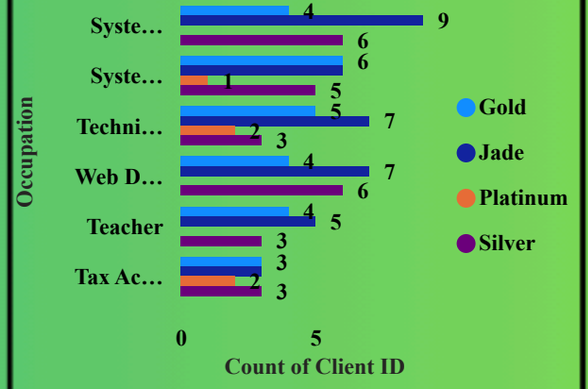
Avg. Estimated Income

513.92M

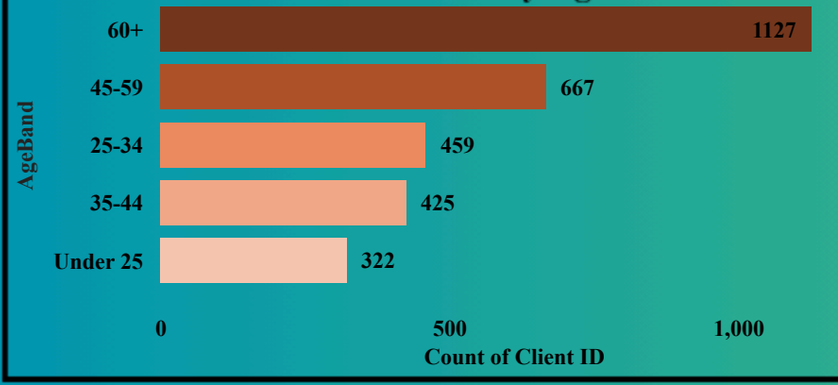
Properties Owned (Total)

14M

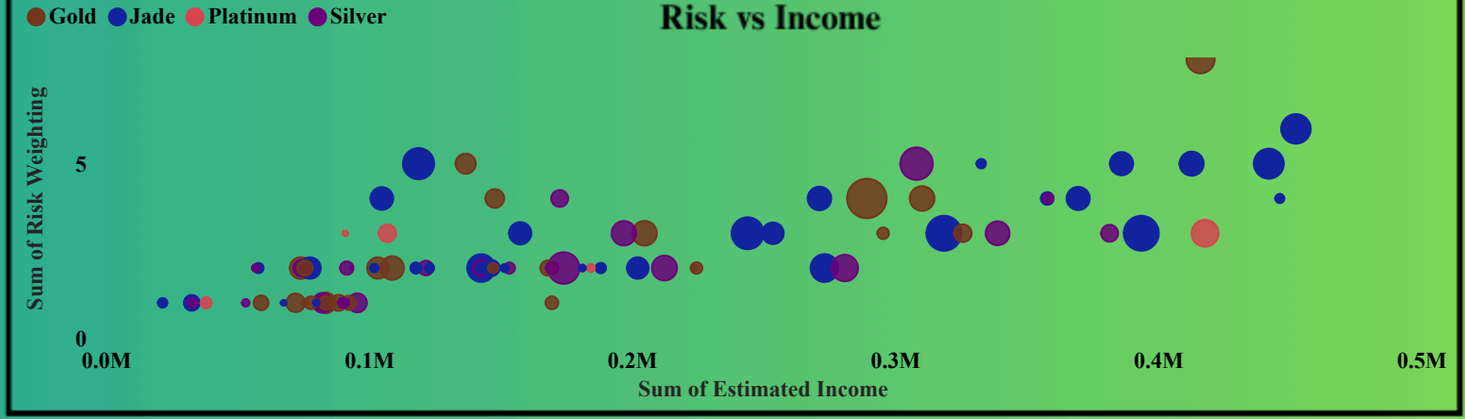
Client Count by Occupation



Customer Distribution by Age Band



Risk vs Income



Home | Loan & Credit Analysis | Deposit Analysis | Customer Segmentation & Risk | **Summary**

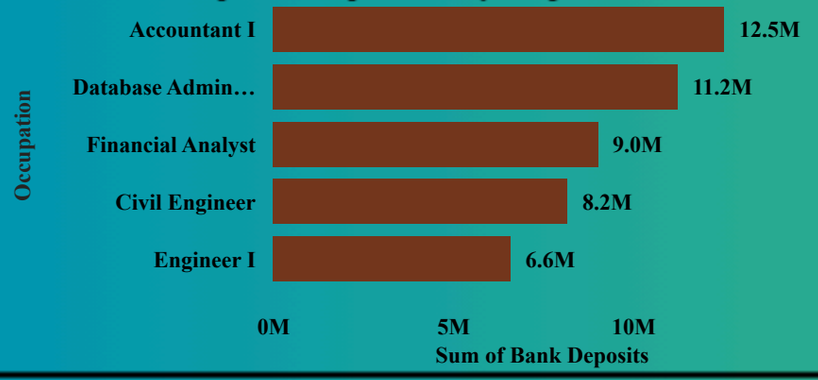
Qtr 1 | Qtr 2 | Qtr 3 | Qtr 4

Total Client	Total Bank Deposit	Total Properties Owned	Avg Credit Utilization	Total Bank Loan	Avg Customer Age	Total Business Lending
9M	6.04T	14M	6.51M	5.32T	153.12K	7.80T

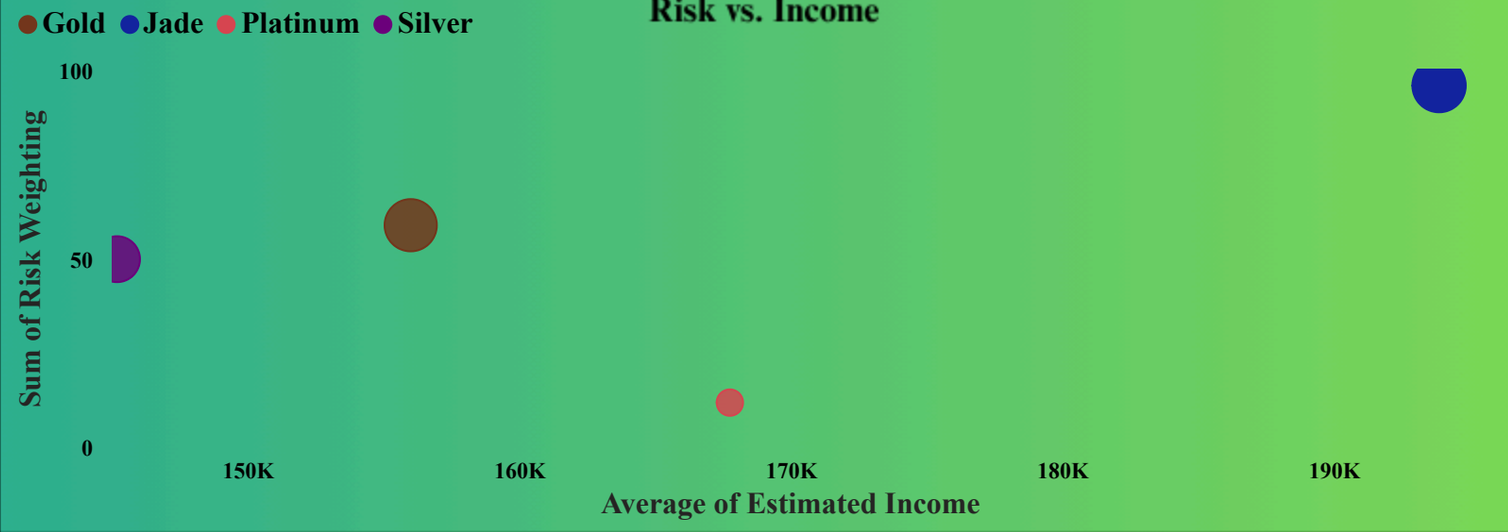
High net-worth business clients contribute over 40% of total deposits. Risk profile skewed higher in students. Opportunity in cross-selling credit products to clients with low utilization and high savings

All | All

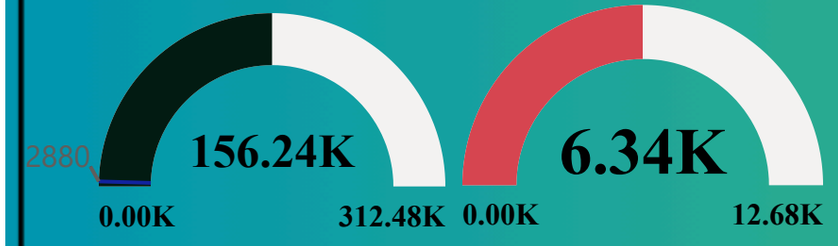
Top 5 Occupations by Deposits



Risk vs. Income



Avg Credit Utilization (%) | Loan-to-Deposit Ratio



Segment Performance Table

CustomerSegment	Average of Bank Deposits	Average of Estimated Income	Sum of AvgRiskWeighting	Sum of TotalClients
Others	6,80,250.30	1,70,753.39	3,706.90	4845120
Mid Value	6,58,361.29	1,75,105.56	1,725.24	2254980
High Value Individual	6,64,384.58	1,67,876.15	1,315.86	1719900
Total	6,71,560.19	1,71,305.03	6,748.00	8820000