

Clients Added in the Last Six Months

This report will show you how client acquisition is happening in the past six months. It is displayed as how many clients were added to the system each month. In analyzing this report the company can know its growth rate, how well client acquisition is working, and if there are any seasonal patterns of client registrations.

Key Insights:

- Helps monitor business growth trends.
- Indicates month where client acquisition was higher or lower.
- Aids in marketing and outreach plans.

```
nimamemarzadeh@Nimas-MacBook-Pro module-11 % python3 clients_added_report.py
Connected to the database.

--- Clients Added in the Last Six Months ---

Month          New Clients
-----
2024-07         2
2024-08         2
2024-09         1
2024-10         1
2024-11         2

Report generated successfully.

Connection closed.
nimamemarzadeh@Nimas-MacBook-Pro module-11 %
```

High-Transaction Clients

It is the list of clients that have made more than 10 transactions in any given month. This report analyzes monthly transaction activity to show you the most active or active customers. These customers may be more demanding for instance bespoke advice or priority for subsequent campaigns.

Key Insights:

- Identifies the customers with the most month traffic, which means they are active.
- Delivers custom services or deals to profitable customers.
- Gives you a baseline to plan the workload and still have enough resources to support live customers.

```

nimamemarzadeh@Nimas-MacBook-Pro module-11 % python3 high_transaction_clients_report.py
Connected to the database.

--- High-Transaction Clients (More than 10 Transactions in a Month) ---

Client Name      Transaction Count  Month
-----
Charlie Brown    11                2024-10
Bob Jones        11                2024-11
Alice Smith      11                2024-12

Report generated successfully.

Connection closed.
nimamemarzadeh@Nimas-MacBook-Pro module-11 %

```

Average Asset Value Per Client

This is the average asset value of all clients in the database calculated. It takes all the assets connected to a client by account and calculates the average of those assets. The company can use this report to target the high value clients and provide custom financial advisory services. It also gives you an idea of the asset distribution among customers, enabling the company to assign resources to key segments.

Key Insights:

- Helps to find valuable customers with large average assets holdings.
- Mentioned to provide custom services or investment solutions.
- Allows you to see the overall distribution of assets for the entire client base.

```

nimamemarzadeh@Nimas-MacBook-Pro module-11 % python3 average_asset_per_client_report.py
Connected to the database.

--- Average Asset Value for Each Client Report ---

Client Name      Average Asset Value
-----
Alice Smith      $120,000.00
Bob Jones        $50,000.00
Charlie Brown    $30,000.00
Diana Prince     $20,000.00
Eve Adams        $150,000.00
Frank Wilson     $7,000.00
Grace Lee        $40,000.00
Henry Ford       $50,000.00
Ivy Green        $130,000.00
Jake White       $8,000.00

Report generated successfully.

Connection closed.
nimamemarzadeh@Nimas-MacBook-Pro module-11 %

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Compliance Reports by Employee

It will give you an idea of what the compliance steps are that every employee is executing. It records how many compliance reports or actions were recorded in the system for each employee. Based on this report, the company can review what employees are doing the most to be compliant and where further assistance or training is needed.

Key Insights:

- Displays the top performing employees who have the highest compliance reports and are participating in regulatory duties.
- Supports a detection of workload split between compliance employees.
- Inspect compliance by checking team performance.

```
nimamemarzadeh@Nimas-MacBook-Pro mileston3 2 % python3 compliance_report.py
Connected to the database successfully.

--- Compliance Reports by Employee ---

Employee Name      Total Compliance Reports
-----
June Santos        2
Phoenix Two Star   1
Jake Willson       1
Ned Willson        1
John Doe           1

Report generated successfully.

Connection closed.
nimamemarzadeh@Nimas-MacBook-Pro mileston3 2 %
```