



# SHIELD INSURANCE



**Business & Sales Analysis Dashboard**

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FAUGET

# ABOUT SHIELD INSURANCE

## LOCATIONS

- MUMBAI
- HYDERABAD
- NEWDELHI
- CHENNAI
- INDORE

## PRODUCTS

- POL4321HEL
- POL4331HEL
- POL3309HEL
- POL5319HEL
- POL2005HEL
- POL1048HEL
- POL9221HEL
- POL6093HEL
- POL6303HEL

## SALES MODE

- ONLINE APP
- ONLINE WEB
- OFFLINE DIRECT
- OFFLINE AGENTS

## AGE GROUP

- 18-24
- 25-30
- 31-40
- 41-50
- 51-65
- 65+



# SHIELD INSURANCE

## OBJECTIVE

- **The analysis focuses on:**
- Total customers and over all revenue Analysis.
- Daily revenue growth and daily customer growth rate.
- Month-over-month comparison of revenue and customer growth.
- Monthly trends in revenue and customer acquisition.
- *City-wise performance:*
  - revenue and customer distribution across 5 cities
- *Age group analysis:*
  - customer behavior and contribution by age segments
  - Product preference trends different age groups
- *Sales mode performance*
  - offline agents, direct, online app, and web
  - Comparison of revenue vs customer acquisition across sales channels
  - Overall revenue and customer split (%) by sales mode

# SHIELD INSURANCE



## KEY METRICS

TOTAL CUSTOMERS **26841**

DAILY CUSTOMER GROWTH **148.29**

TOTAL REVENUE **₹989.3 M**

DAILY REVENUE GROWTH **5.47 M**

- **March** recorded the highest revenue of **₹263.84 Million**, contributing **26.6%** to the overall revenue.
- The **₹5000 premium** policy emerged as the most sold premium policy across the dataset.
- **Delhi** led in both revenue generation and customer acquisition, closely followed by Mumbai.
- The **31–40** age group contributed the highest number of customers and revenue contribution making it the most engaged segment.

# TREND CHART ANALYSIS



## MOM

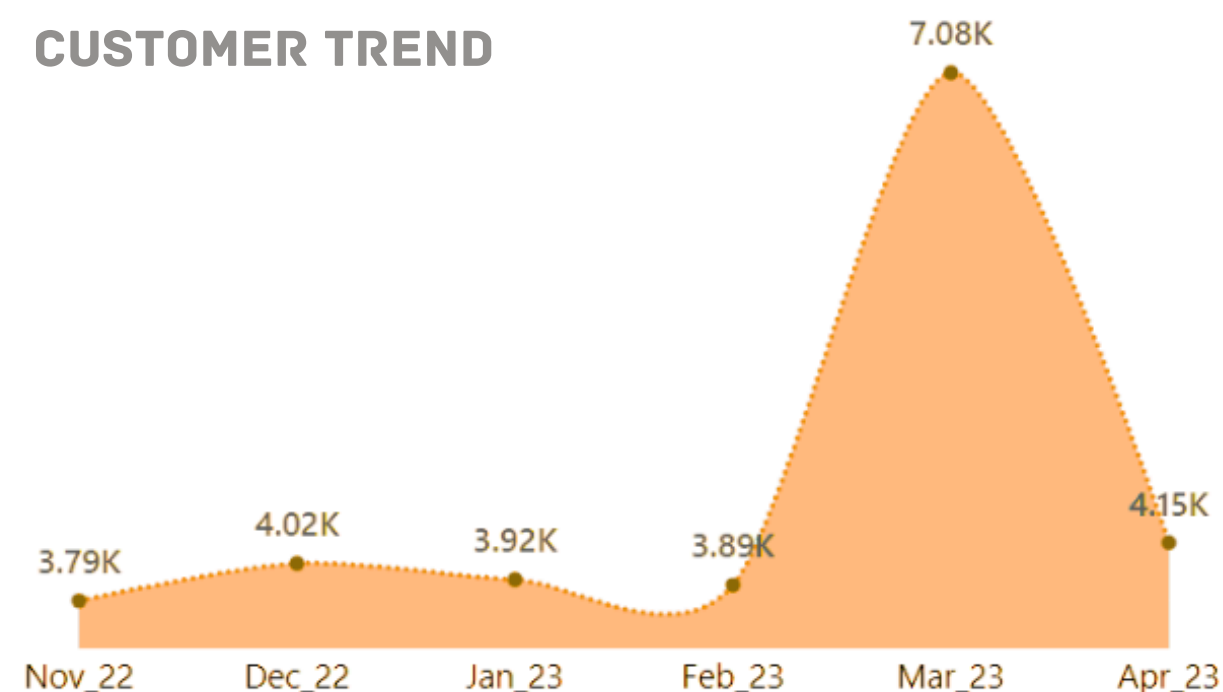
mmm_yy	total_revenue	Total_Customers	CG MOM%	MRG %
Nov_22	₹131.69M	3787	0.00%	
Dec_22	₹156.32M	4020	6.15%	18.71%
Jan_23	₹141.02M	3919	-2.51%	-9.79%
Feb_23	₹142.64M	3885	-0.87%	1.15%
Mar_23	₹263.84M	7081	82.27%	84.97%
Apr_23	₹153.75M	4149	-41.41%	-41.73%

## KEY POINTS

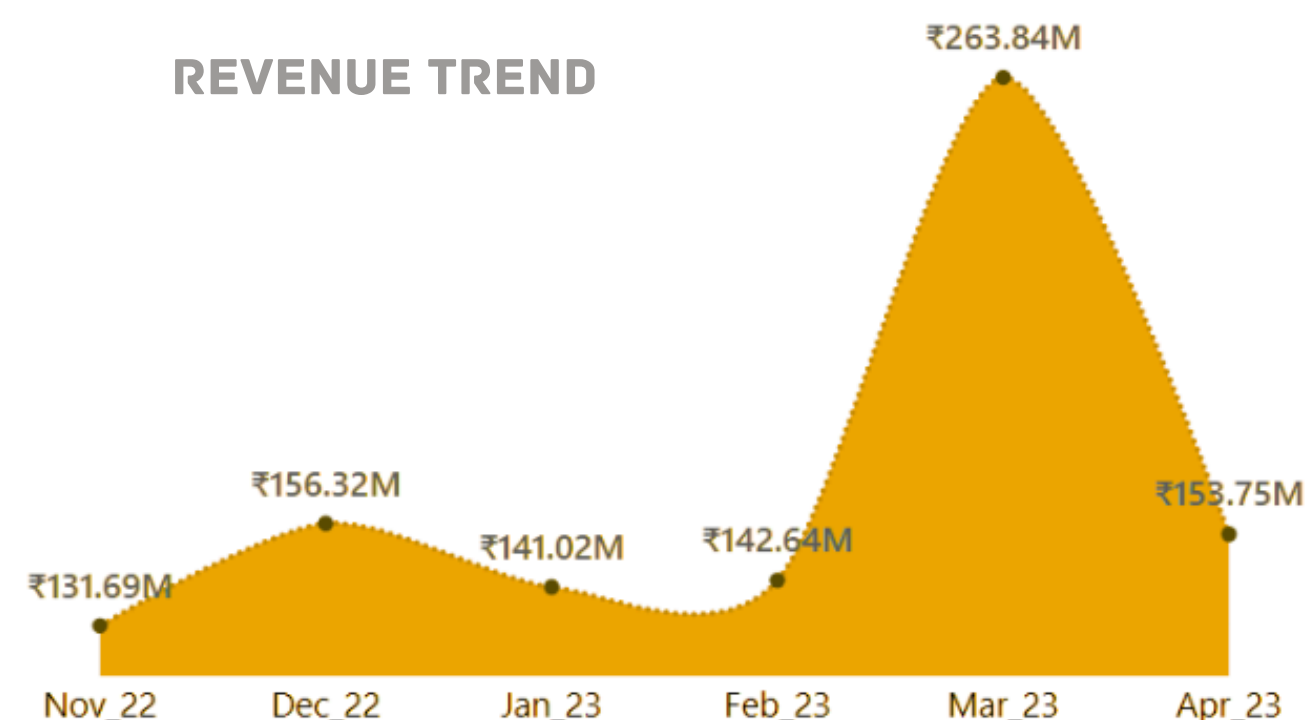
- March marked the peak for both revenue and customer count across all months.
- February to March saw the highest growth: Revenue up by 84.97%, Customer base up by 82.27%.
- November recorded the lowest performance in both metrics.
- Between November and December, revenue increased by 18.7% despite only 6.15% customer growth, indicating higher value per customer.
- A minor decline occurred from January to February, showing a temporary slowdown.
- From March to April, there was a significant drop of 41.7% in revenue, with a corresponding decrease in customer count.

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### CUSTOMER TREND



### REVENUE TREND



# AGE GROUP ANALYSIS

Age Group	Total_Customers	total_revenue
18-24	1844	₹25.3M
25-30	3194	₹56.7M
31-40	10460	₹311.1M
41-50	5590	₹207.7M
51-65	3518	₹184.5M
65+	2235	₹203.9M
<b>Total</b>	<b>26841</b>	<b>₹989.3M</b>

- The 31–40 age group dominates with 10,460 customers and generates the highest revenue of ₹311.1M, contributing nearly 31% of total revenue.
- The 41–50 group follows with 5,590 customers and ₹207.7M, showing strong engagement and purchasing power.
- Though the 65+ segment has only 2,235 customers, it contributes ₹203.9M, indicating high revenue per customer.
- The 18–24 group is the smallest both in customers (1,844) and revenue (₹25.3M), reflecting limited purchasing capacity..
- Age groups 31–65 form the core base, accounting for over 80% of total revenue, making them the primary target for premium policies.



# PREMIUM & AGE GROUP ANALYSIS



Premium	18-24	25-30	31-40	41-50	51-65	65+	Total
120000	₹3.96M	₹10.36M	₹71.82M	₹52.75M	₹67.88M	₹117.49M	₹324.26M
76500	₹2.36M	₹8.37M	₹54.27M	₹32.92M	₹31.42M	₹38.50M	₹167.86M
42500	₹2.78M	₹4.99M	₹39.61M	₹31.26M	₹29.01M	₹20.68M	₹128.33M
31700	₹2.42M	₹6.26M	₹36.55M	₹27.26M	₹18.81M	₹11.24M	₹102.55M
21500	₹2.08M	₹5.15M	₹30.89M	₹22.91M	₹14.73M	₹5.99M	₹81.76M
16700	₹1.59M	₹4.80M	₹28.15M	₹18.73M	₹11.62M	₹4.69M	₹69.60M
12000	₹2.85M	₹5.66M	₹26.26M	₹12.29M	₹6.18M	₹2.69M	₹55.92M
7500	₹2.92M	₹5.03M	₹14.65M	₹6.28M	₹2.88M	₹1.74M	₹33.50M
5000	₹4.35M	₹6.11M	₹8.92M	₹3.25M	₹1.95M	₹0.88M	₹25.47M
Total	₹25.32M	₹56.74M	₹311.13M	₹207.66M	₹184.49M	₹203.92M	₹989.25M

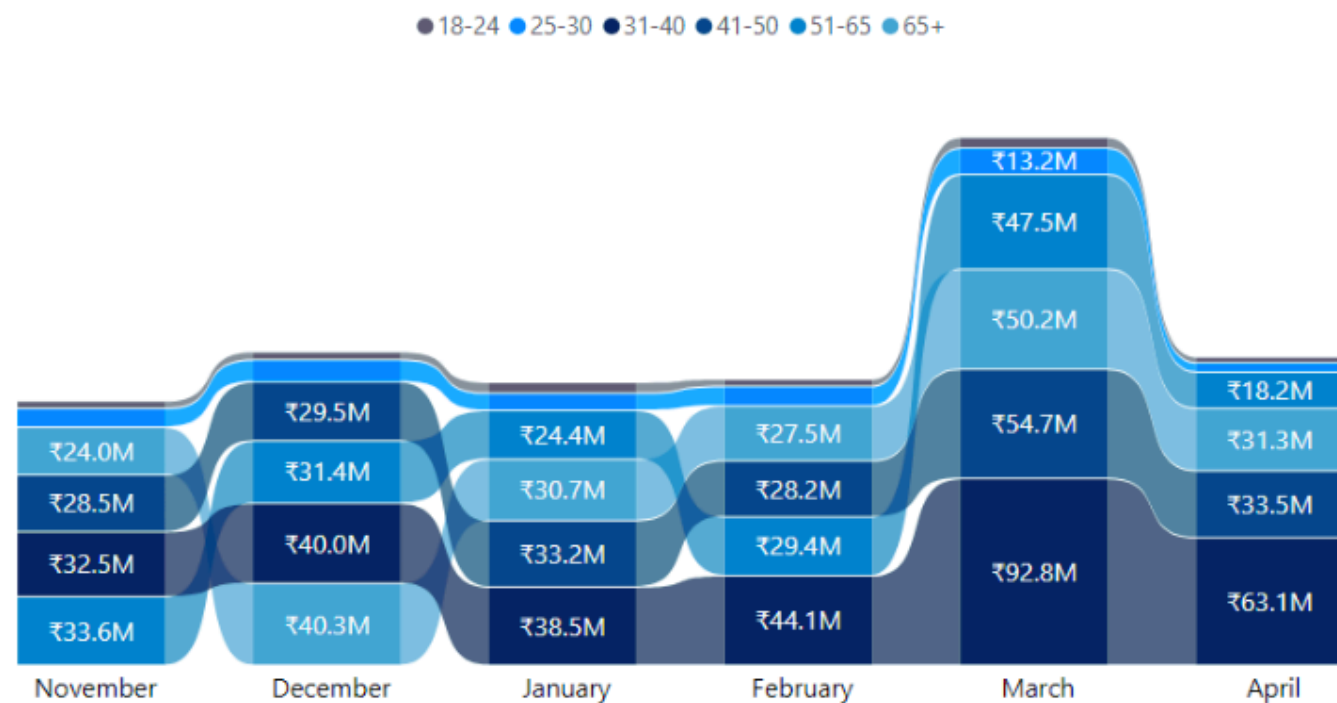
Premium	18-24	25-30	31-40	41-50	51-65	65+	Total
12000	231	441	1836	806	370	145	3829
120000	32	81	499	338	400	618	1968
16700	93	269	1414	874	500	179	3329
21500	94	224	1202	826	492	179	3017
31700	74	185	966	668	425	225	2543
42500	64	110	779	570	484	311	2318
5000	847	1152	1526	517	279	113	4434
7500	379	630	1644	658	276	148	3735
76500	30	102	594	333	292	317	1668
Total	1844	3194	10460	5590	3518	2235	26841

- The ₹5000 premium has the highest number of customers (4,434) but generates only ₹25.47M, indicating low revenue per customer.
- ₹120000 premium leads in total revenue (₹324.26M) despite fewer customers, showing high-value conversions, especially from 31–65+ age groups.
- The 31–40 age group is the largest segment with 10,460 customers and contributes the most revenue: ₹311.13M, making it the core target audience.
- ₹76500 is the second-highest revenue generator (₹167.86M), mainly driven by the 31–50 and 65+ age groups.
- Most buyers of the ₹5,000 premium plan are from the 18 to 40 age group. In fact, 79% of all customers choosing this plan come from this segment
- High-premium plans (₹42500 and above) are preferred by age groups (31–65+),
- The second most popular product is the ₹7,500 premium plan. Most of its buyers are from the 31 to 40 age group,

# AGE GROUP TREND ANALYSIS



Age group-Revenue monthly Trend



- six-month trend analysis of revenue contributions by age group.
- The main competition here is between 31-40, 41-50, 51-65, and 65+.
- The 18-24 and 25-30 groups consistently contribute the least.
- Interestingly, the 51-65 age group started off strong in November but declined gradually to the fourth position.
- The 65+ group shows steady growth, climbing from fourth place to third, now contributing nearly 20% monthly.
- The 41-50 group remains stable, contributing around 20% each month with minor fluctuations.
- The standout performer is the 31-40 segment, which grew steadily to dominate revenue share, peaking at 41% in April.



# CITY ANALYSIS

city	Total_Customers	total_revenue
Indore	2096	₹81.3M
Chennai	2966	₹106.3M
Hyderabad	4340	₹160.5M
Mumbai	6432	₹239.5M
Delhi NCR	11007	₹401.6M
Total	26841	₹989.3M

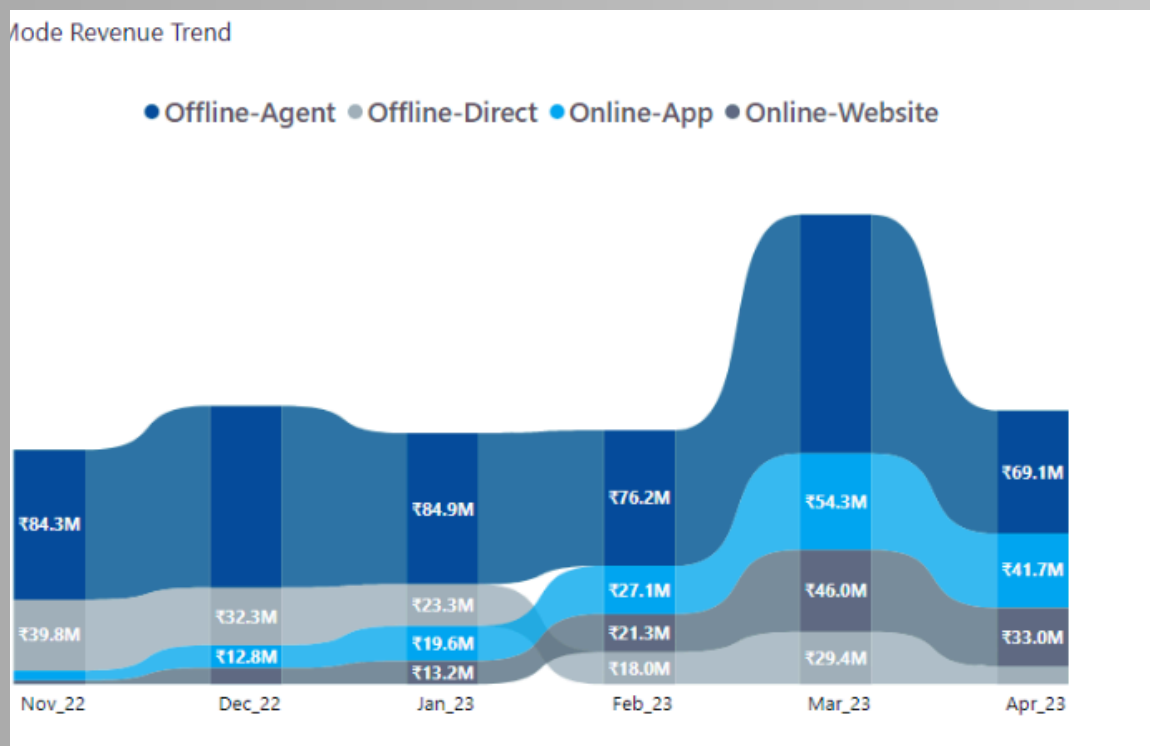
- **Delhi NCR** leads in both metrics with **11007** customers and **₹401.6M** in revenue, contributing over **40%** of total revenue.
- **Mumbai** ranks **second**, with **6432** customers and generating **₹239.5 M**, over 24% of total revenue.
- Hyderabad follows with 622 customers and ₹23.1M, showing balanced performance.
- **Chennai and Indore** recorded the lowest figures, with **2966** and **2096** customers and revenue **106.3 M** and **₹81.3 M** respectively,
- **Delhi and Mumbai** together account for **more than two-thirds of overall revenue**, making them key strategic markets.

# SALES MODE ANALYSIS



sales_mode	total_revenue	Total_Customers
Offline-Agent	₹550.76M	14873
Online-App	₹160.97M	4302
Offline-Direct	₹152.91M	4256
Online-Website	₹124.62M	3410
Total	₹989.25M	26841

## SALES MODE TREND

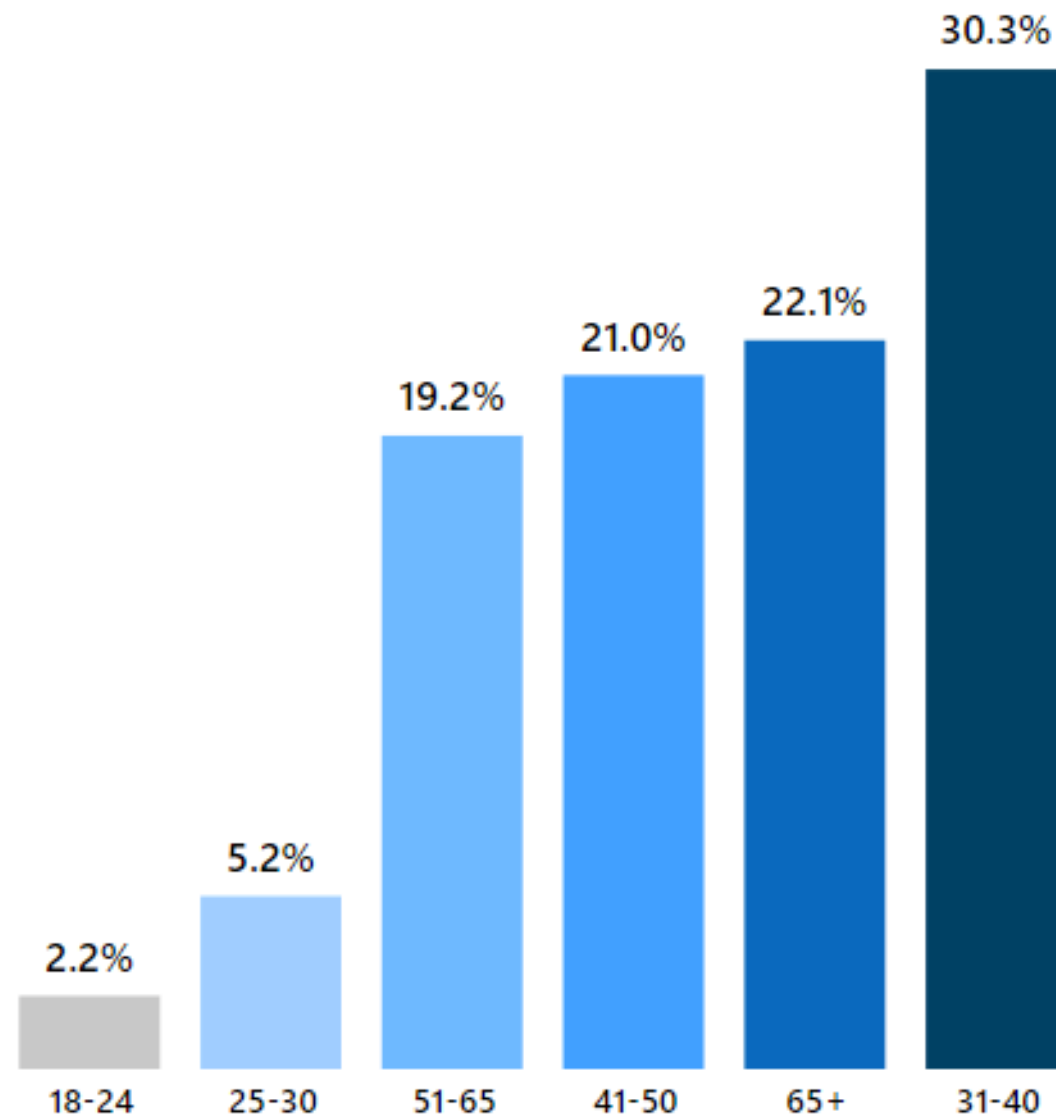


- **Offline-Agent** is the top sales mode with the most customers (14,873) and the highest revenue (₹550.76M).
- **Online-App and Offline-Direct** have similar customer numbers (around 4,300) and good revenue (₹160.97M and ₹152.91M).
- **Online-Website** has the fewest customers (3,410) and the lowest revenue (₹124.62M).
- **Offline agents** currently drive 55.6% of total revenue, and customer acquisition is strongest through them.
- However, interesting shifts are seen month-on-month
- Online App grew from 4% to 27.1%, now ranking 2nd.
- Offline Direct dropped from 30.2% to 6.5%, slipping from 2nd to 4th place.
- Online Web moved up from the bottom to 3rd position.
- This shows customers are adopting online channels.
- In terms of both revenue and customer acquisition, Offline Agents are the top channel across all cities and all age groups.

## EXPECTED SETTLEMENT



estimated total settlement amount % by Age Gr...



- The 31–40 age group has the highest total claim settlement – ₹480.1M.
- The 65+ age group also has high settlement value, even with fewer customers.
- Middle age groups (41–65) show steady claim settlements, making them important for the business.
- Younger groups (18–30) have lower settlement amounts, likely because of smaller policies or fewer claims.
- This shows that older and middle-aged customers use their policies more or have higher policy values.

## RECOMMENDATIONS



- Run focused campaigns in Indore and Chennai to improve customer base and revenue contribution from underperforming cities.
- Continue market dominance in Delhi and Mumbai with retention and upsell strategies.
- Launch targeted campaigns for the 18–30 age group to boost engagement and drive early adoption.
- Refocus on the 51–65 age group, where revenue is steadily declining, to reignite interest with tailored plans.
- Leverage the growing adoption of online channels by enhancing digital presence through app and website promotions.
- Promote higher premium plans like ₹76500 and ₹120000 to increase overall revenue and attract high-value customers.



**THANK YOU FOR WATCHING**