



INTERNSHIP PROGRAM Power BI (TASK -1)

Age

21

35



28

Avg_Age



40

Total Individuals



37

Individuals with Investments



92.50%

% of Individuals with Investments

Female

Male

Objective

- ☐ Capital Appreciation
- ☐ Growth
- ☐ Income

Purpose

- ☐ Returns
- ☐ Savings for Future
- ☐ Wealth Creation

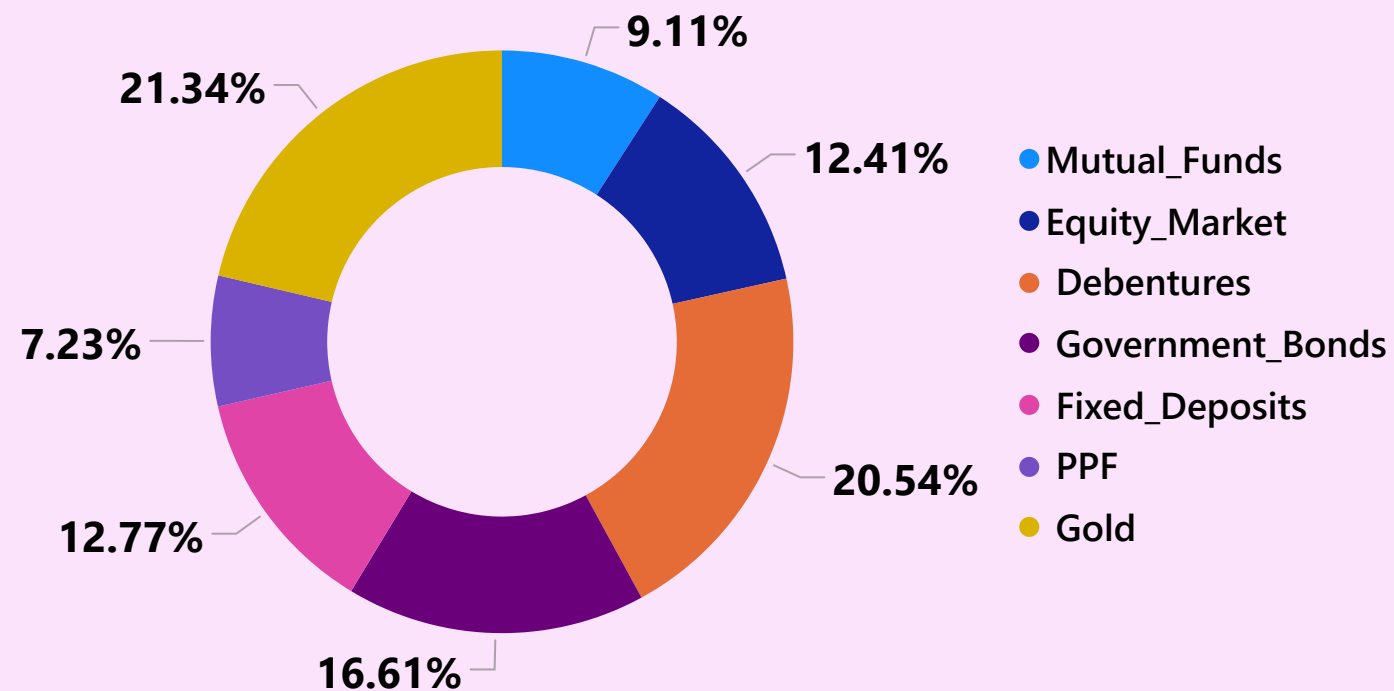
Factor

- ☐ Locking Period
- ☐ Returns
- ☐ Risk

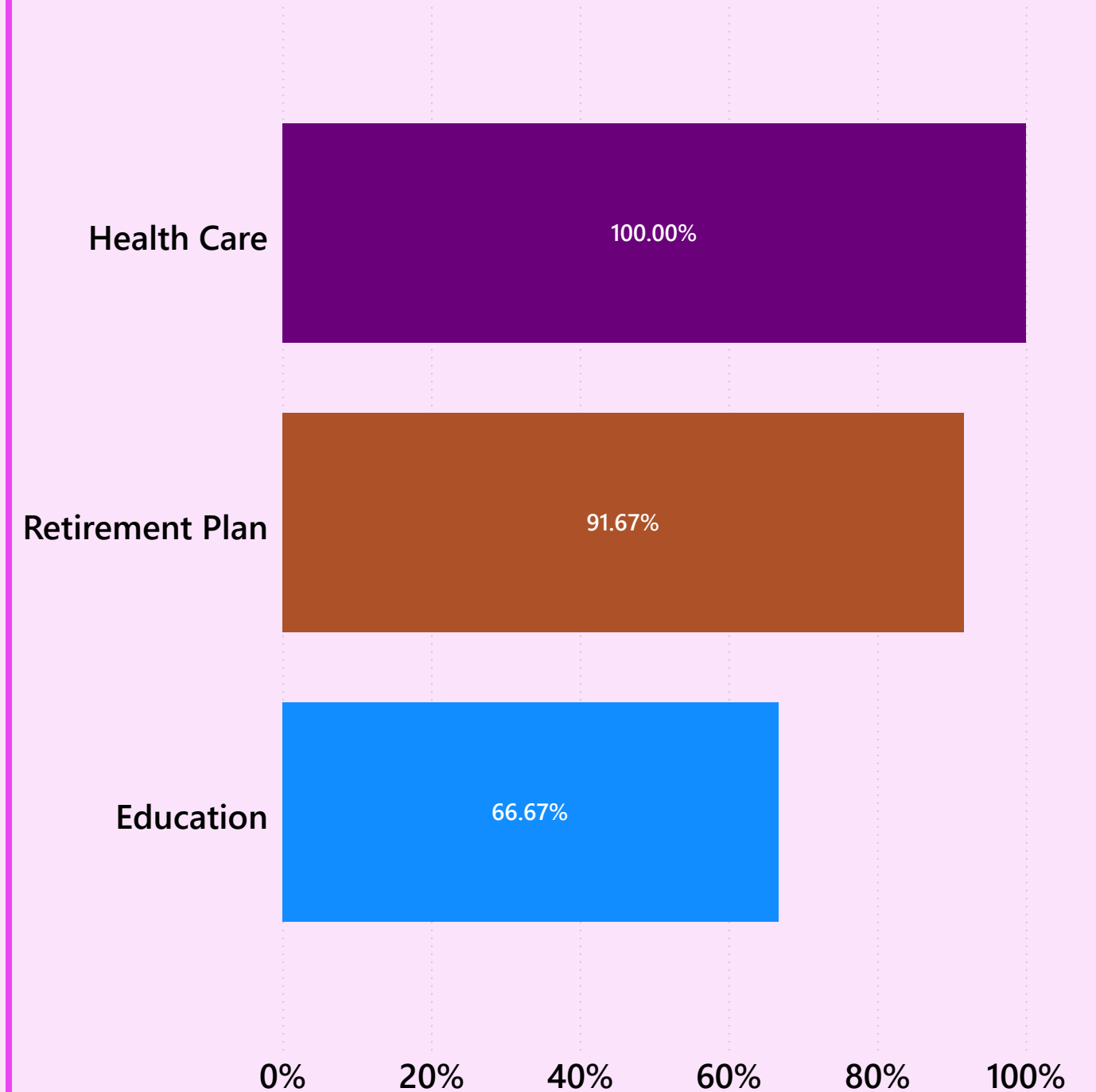
Avenue

- ☐ Equity
- ☐ Fixed Deposits
- ☐ Mutual Fund
- ☐ Public Provident Fund

Percentage of I percentage of individuals ndividuals By Investment Type



% of Individuals with Investments by Savings Objectives





INTERNSHIP PROGRAM Power BI (TASK -2)

Age

21

35

Objective

- ☐ Capital Appreciation
- ☐ Growth
- ☐ Income

Purpose

- ☐ Returns
- ☐ Savings for Future
- ☐ Wealth Creation

Factor

- ☐ Locking Period
- ☐ Returns
- ☐ Risk

Avenue

- ☐ Equity
- ☐ Fixed Deposits
- ☐ Mutual Fund
- ☐ Public Provident Fund



25

Male Investor



%

67.57%

% of Male Investor



12

Female Investor

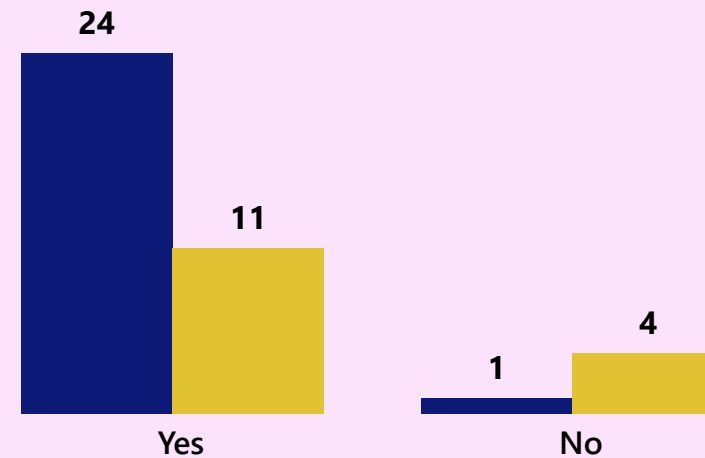


%

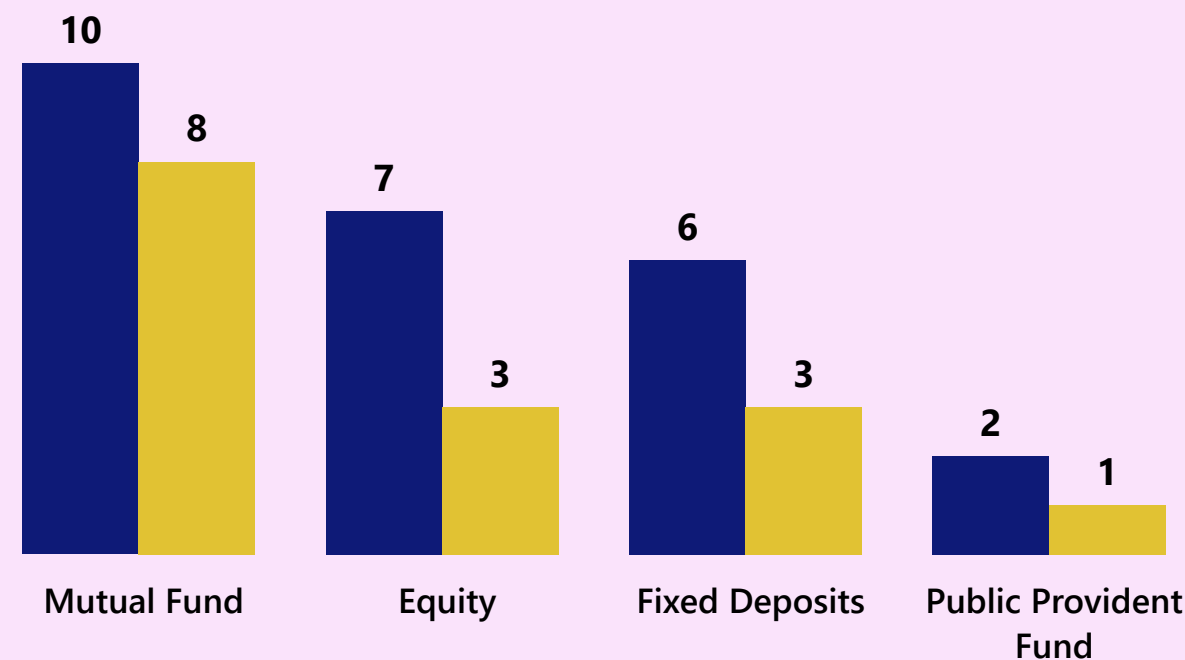
32.43%

% of Female Investor

● count of Male ● count of Female

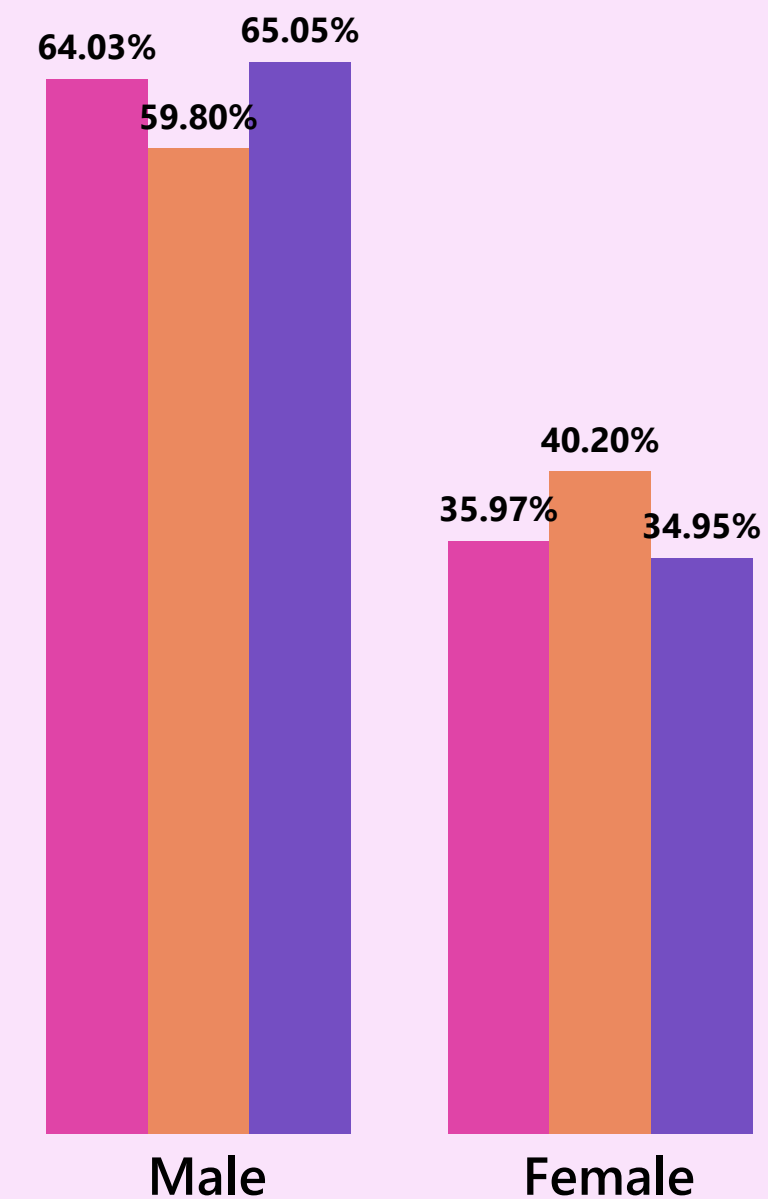


● count of Male ● count of Female



% Of Investment Type By Gender

● % Of Equity_Market ● % Of Mutual_Funds ● % Of Government_Bonds





INTERNSHIP PROGRAM Power BI (TASK -3)

Age

21

35

Objective

- ☐ Capital Appreciation
- ☐ Growth
- ☐ Income

Purpose

- ☐ Returns
- ☐ Savings for Future
- ☐ Wealth Creation

Factor

- ☐ Locking Period
- ☐ Returns
- ☐ Risk

Avenue

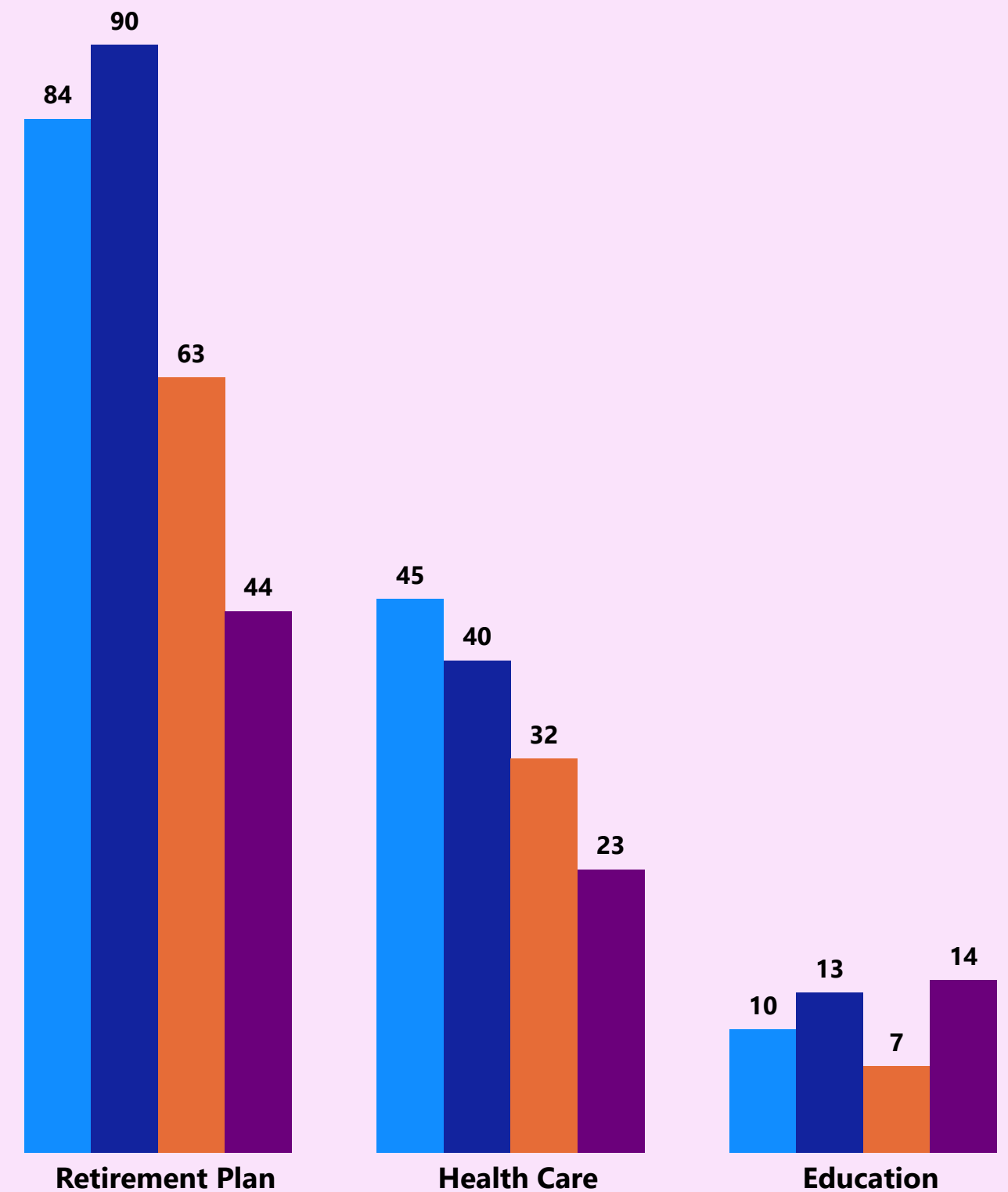
- ☐ Equity
- ☐ Fixed Deposits
- ☐ Mutual Fund
- ☐ Public Provident Fund

Correlation between savings objectives and investment avenues

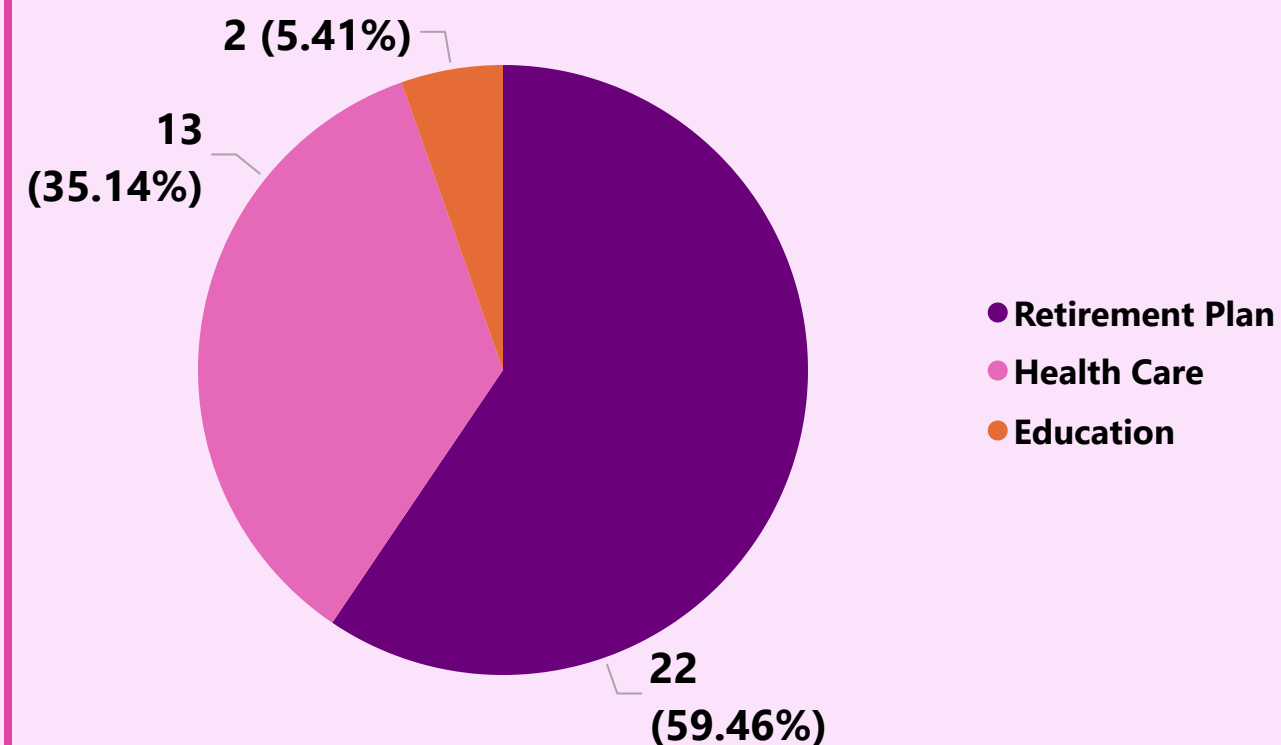
Savings Objectives?	Equity_Market	Fixed_Deposits	Mutual_Funds	PPF
Retirement Plan	84	90	63	44
Health Care	45	40	32	23
Education	10	13	7	14

Investment choices for each savings objective

Equity_Market Fixed_Deposits Mutual_Funds PPF



Investor Count By Savings objective





INTERNSHIP PROGRAM Power BI (TASK -4)

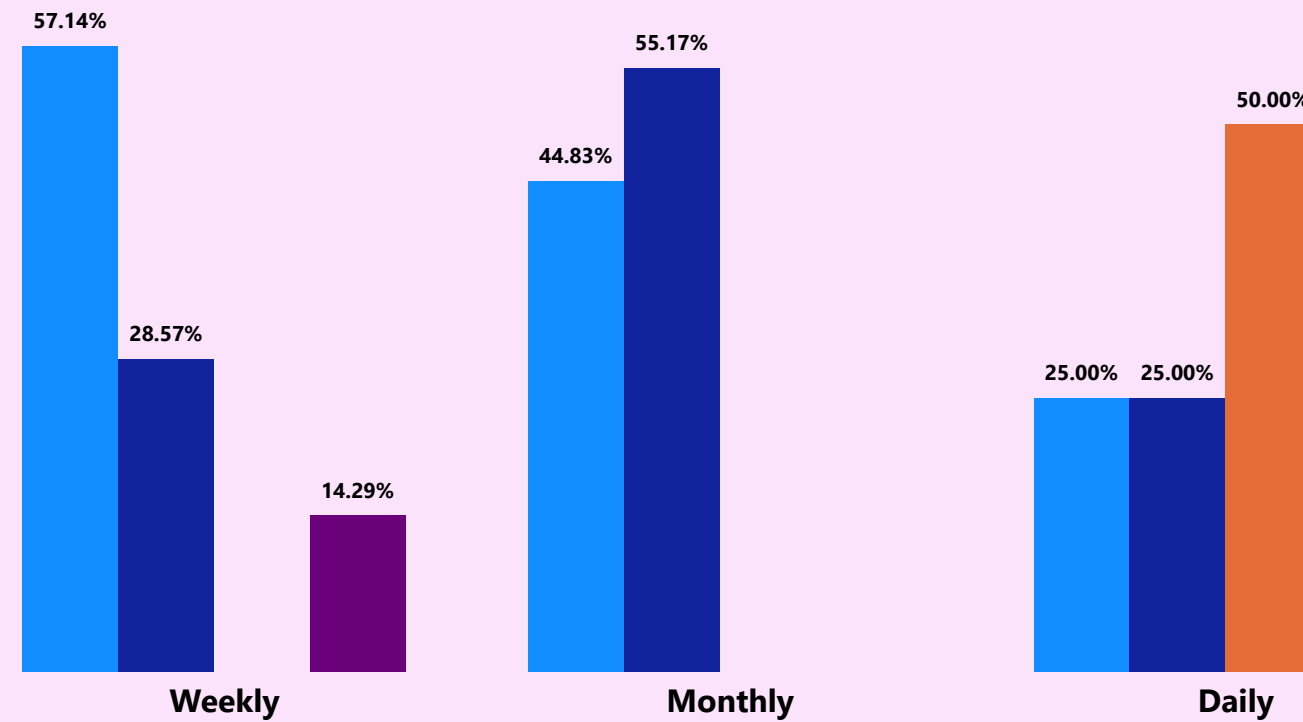
Age

21

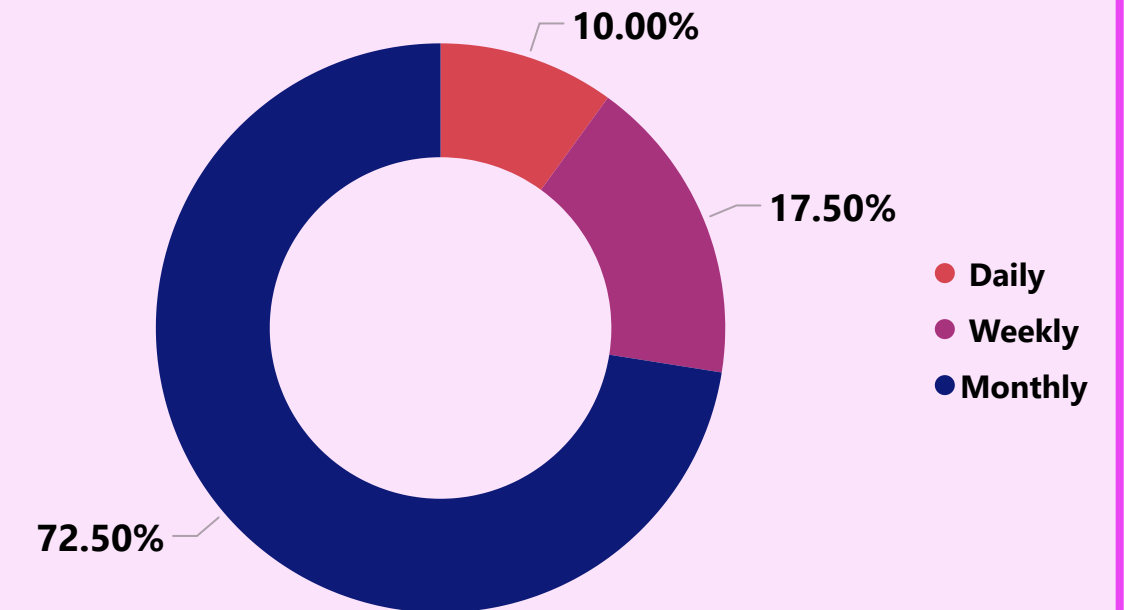
35

Impact on Investment Preferences

1-3 Years 3-5 Years Less than 1 Years More than 5 Years



Distribution of Investment Monitor



Objective

- ☐ Capital Appreciation
- ☐ Growth
- ☐ Income

Purpose

- ☐ Returns
- ☐ Savings for Future
- ☐ Wealth Creation

Factor

- ☐ Locking Period
- ☐ Returns
- ☐ Risk

Avenue

- ☐ Equity
- ☐ Fixed Deposits
- ☐ Mutual Fund
- ☐ Public Provident Fund

Distribution of Investment Durations.

1-3 Years

45.00%

3-5 Years

47.50%

Less than 1 Years

5.00%

More than 5 Years

2.50%



INTERNSHIP PROGRAM Power BI (TASK -5)

Age

21

35



Female

Male

Objective

- ☐ Capital Appreciation
- ☐ Growth
- ☐ Income

Purpose

- ☐ Returns
- ☐ Savings for Future
- ☐ Wealth Creation

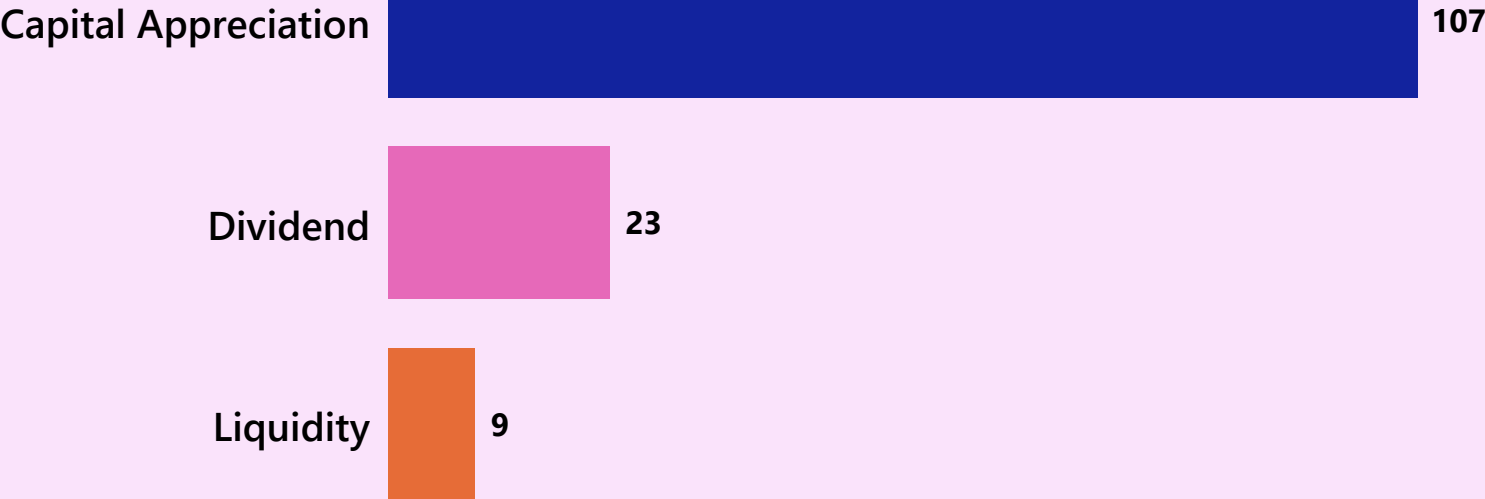
Factor

- ☐ Locking Period
- ☐ Returns
- ☐ Risk

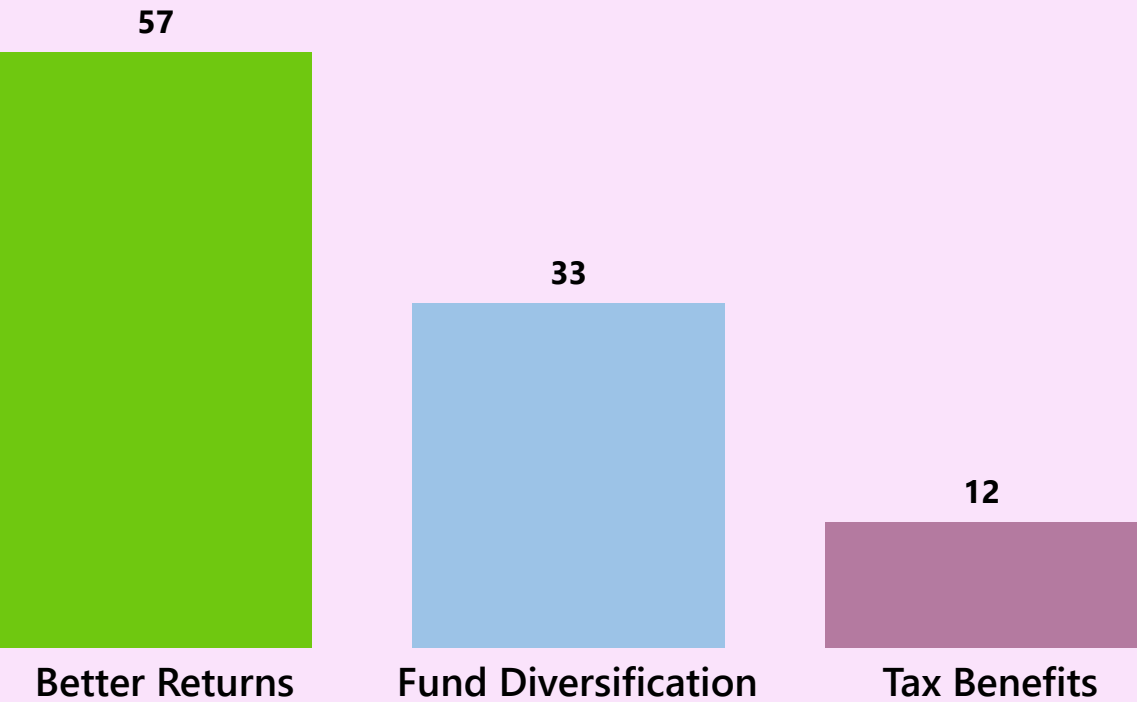
Avenue

- ☐ Equity
- ☐ Fixed Deposits
- ☐ Mutual Fund
- ☐ Public Provident Fund

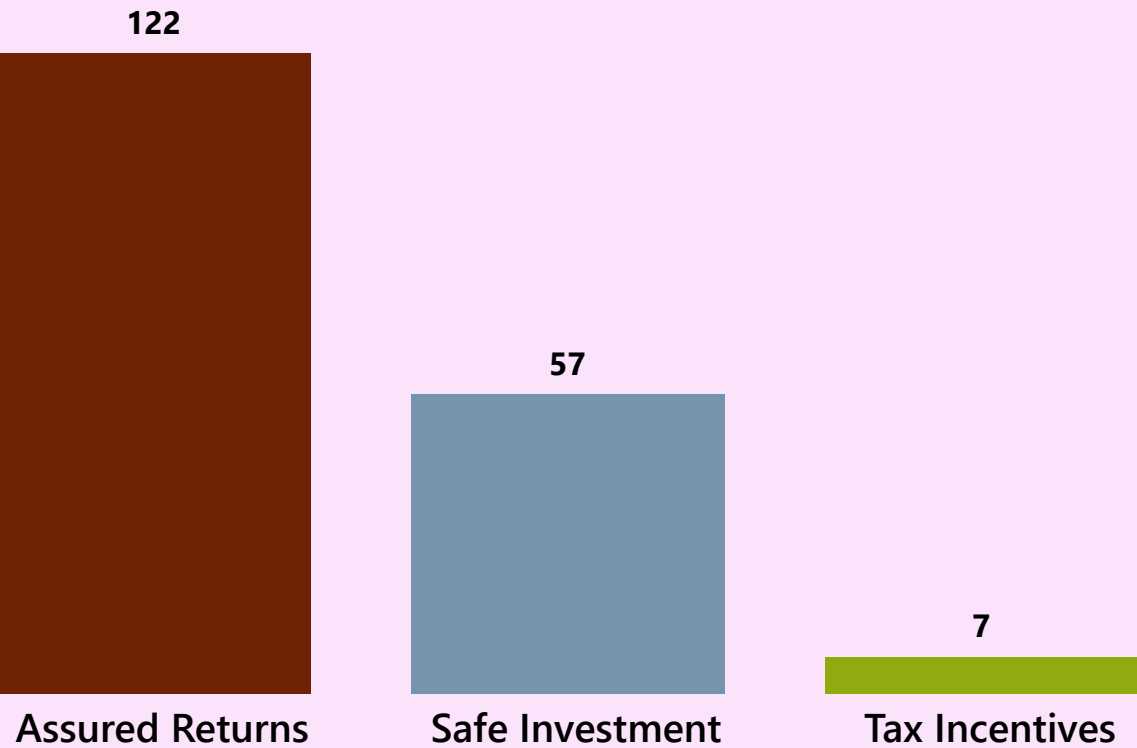
Reasons for Investment in Equity



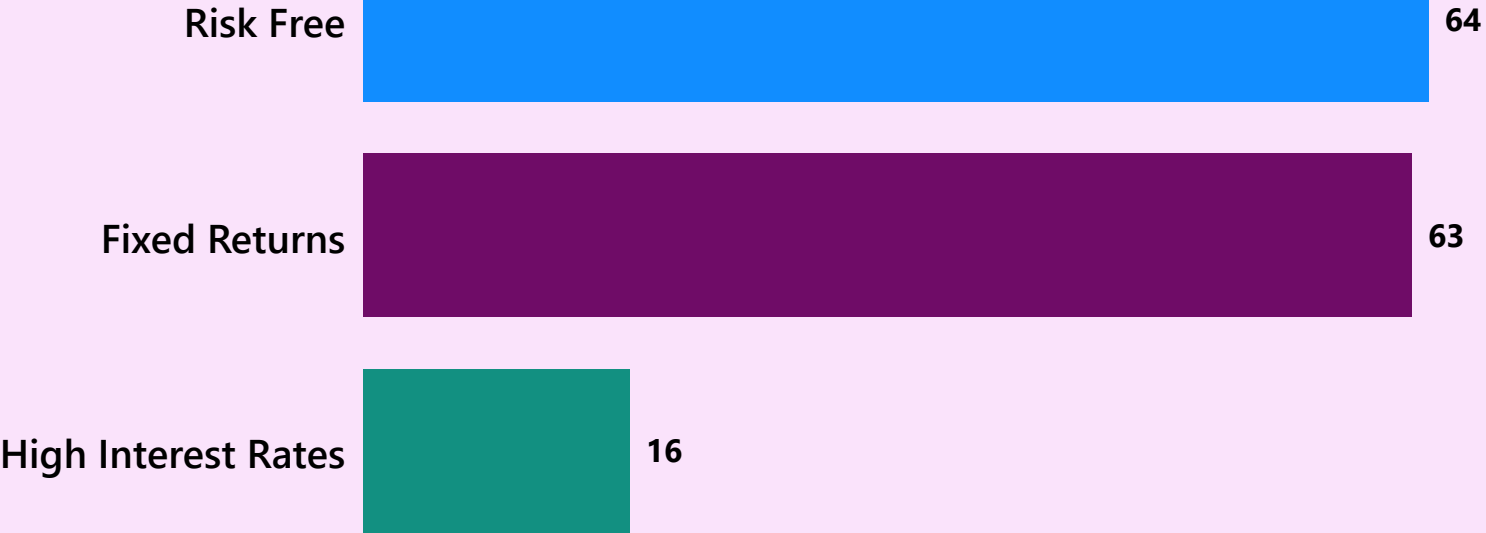
Reasons for Investment in Mutual Fund



Reasons for Investment in Govt. Bond



Reasons for Investment in FD





INTERNSHIP PROGRAM Power BI (TASK -6)

Age

21

35

Female

Male

Objective

- ☐ Capital Appreciation
- ☐ Growth
- ☐ Income

Purpose

- ☐ Returns
- ☐ Savings for Future
- ☐ Wealth Creation

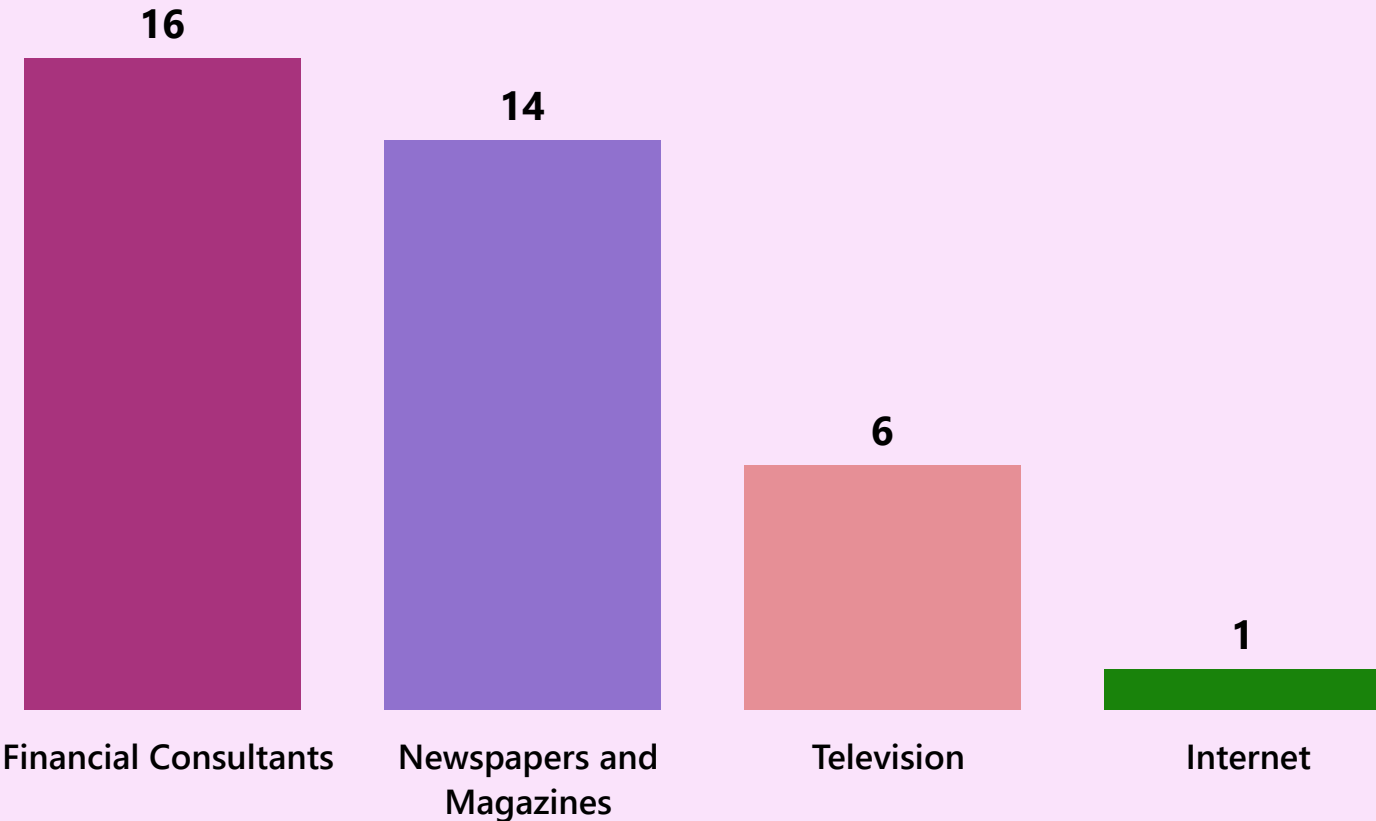
Factor

- ☐ Locking Period
- ☐ Returns
- ☐ Risk

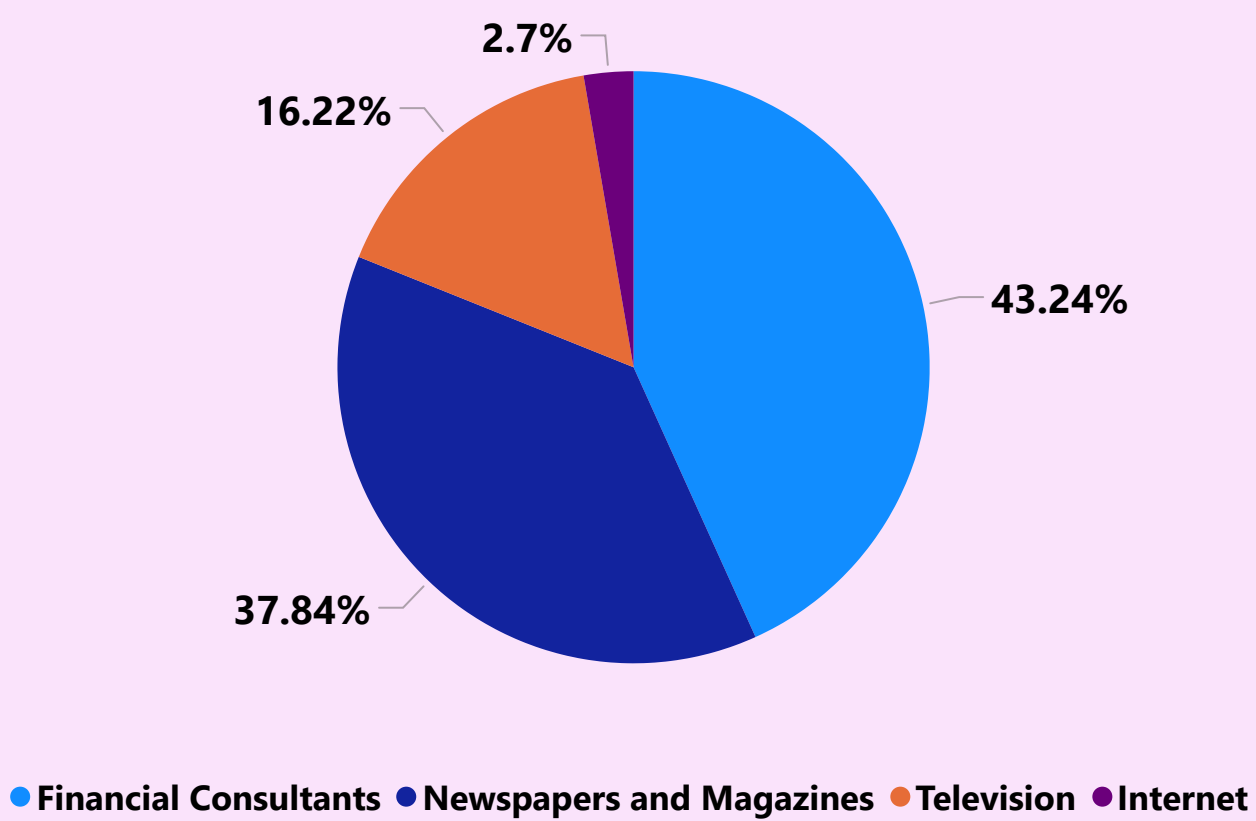
Avenue

- ☐ Equity
- ☐ Fixed Deposits
- ☐ Mutual Fund
- ☐ Public Provident Fund

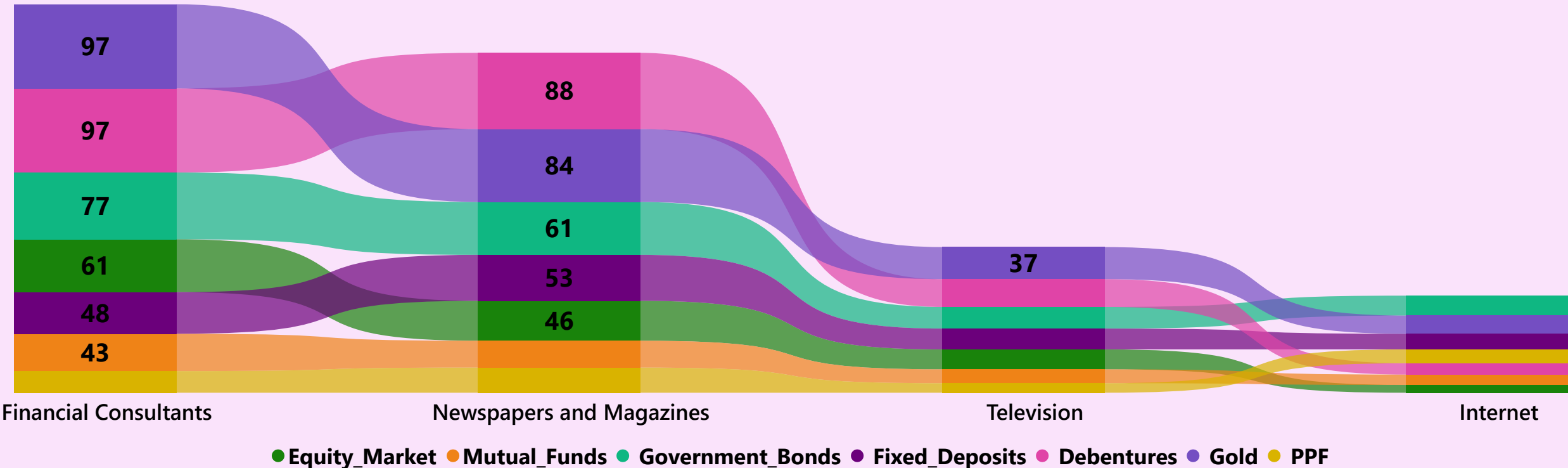
Source for Investment Information



% of Source for Investment Information



Source for Various Type of Investment Information





INTERNSHIP PROGRAM Power BI (TASK -7)

Age

21

35

Avg_Age

28

Total Individuals

40

Total Investor

37

Male...

25

% of Male Investor

67.57%

Female Investor

12

% of Female Investor

32.43%

Female

Male

Objective

☐ Capital Appreciation

☐ Growth

☐ Income

Purpose

☐ Returns

☐ Savings for Future

☐ Wealth Creation

Factor

☐ Locking Period

☐ Returns

☐ Risk

Avenue

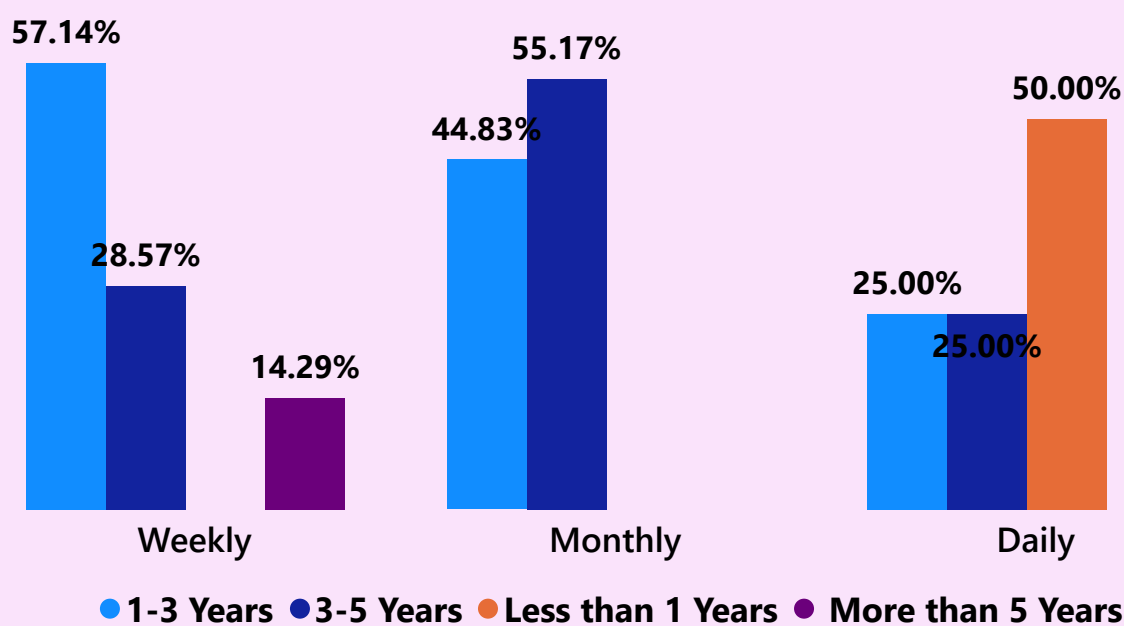
☐ Equity

☐ Fixed Deposits

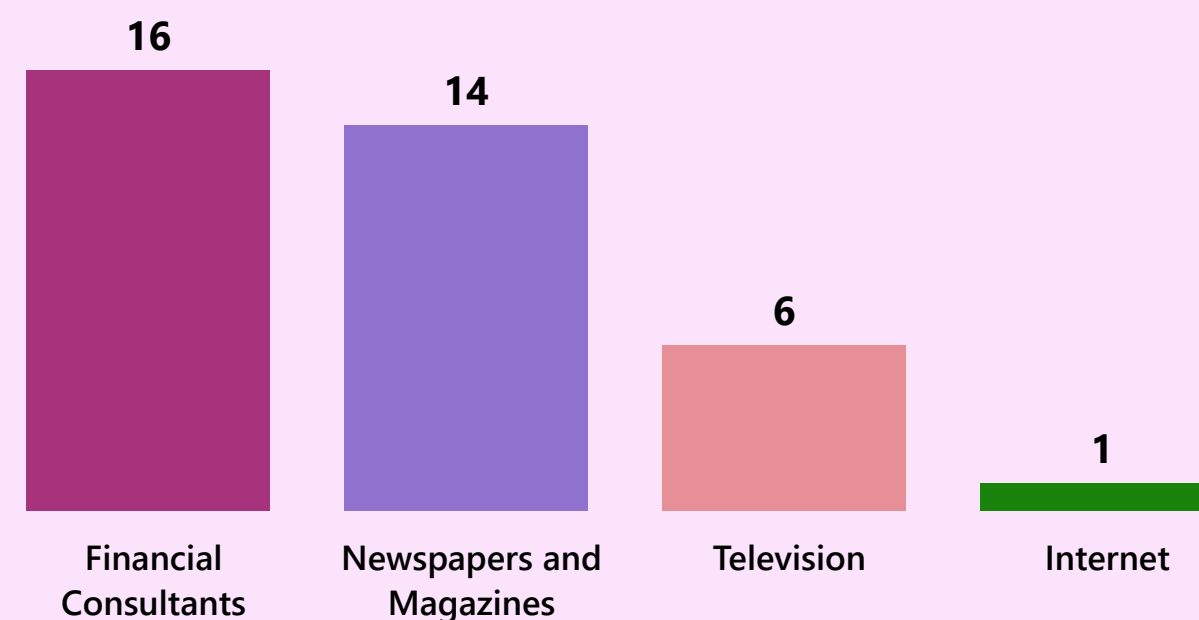
☐ Mutual Fund

☐ Public Provident Fund

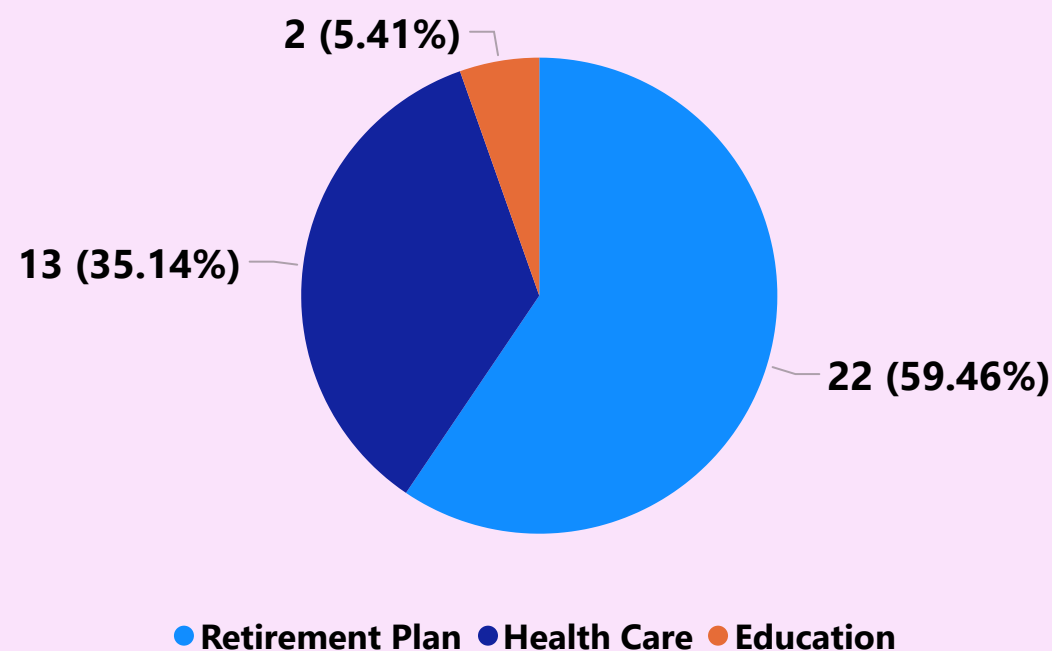
Impact on Investment Preferences



Source for Investment Information



Investor Count By Savings objective



Investment Choice

