

DATA EXPLORATION AND SUMMARY

27.80

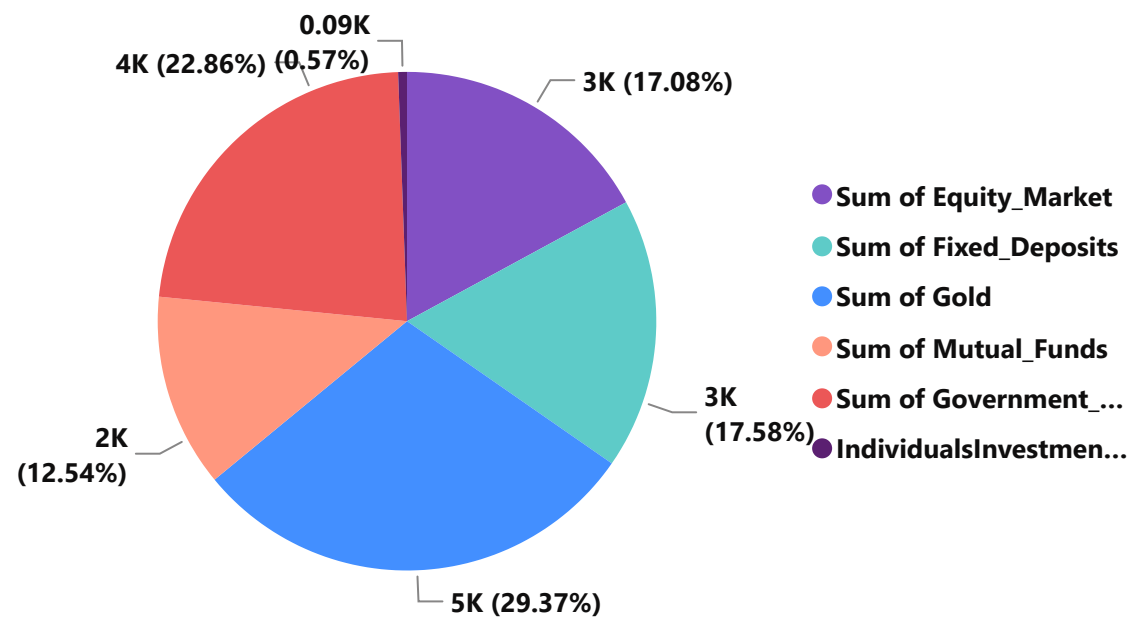
AverageAge

Duration

1-3 years
3-5 years
Less than 1 year
More than 5 years

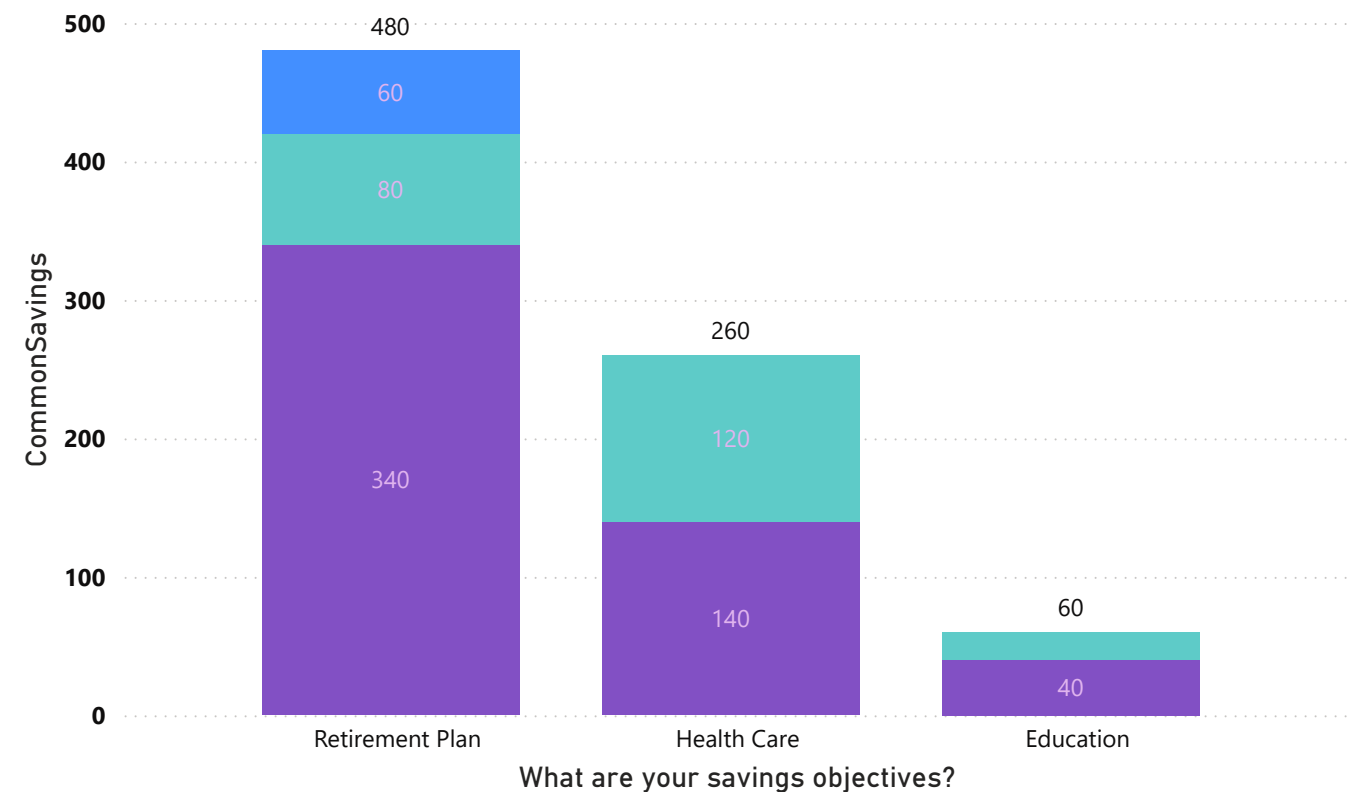
Avenue	Sum of Debentures	Sum of Equity_Market	Sum of Fixed_Deposits	Sum of Gold	Sum of Government_Bonds	Sum of Mutual_Funds
Mutu...	1980	1240	1520	2080	1500	1020
Fixed...	1160	580	540	1100	940	400
Equity	1060	740	640	1280	960	440
Publi...	400	220	160	320	320	180
Total	4600	2780	2860	4780	3720	2040

Percentage of Individual with various Investments



CommonSavings by What are your savings objectives? and Objective

Objective ● Capital Appreciation ● Growth ● Income



Gender

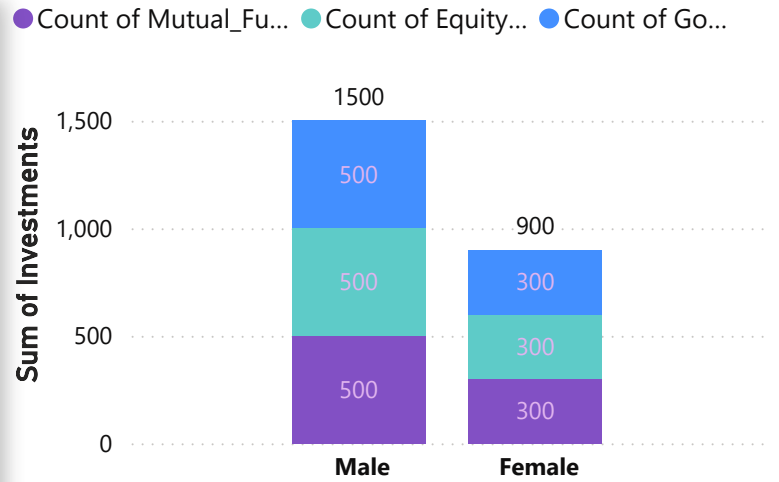
Female

Male

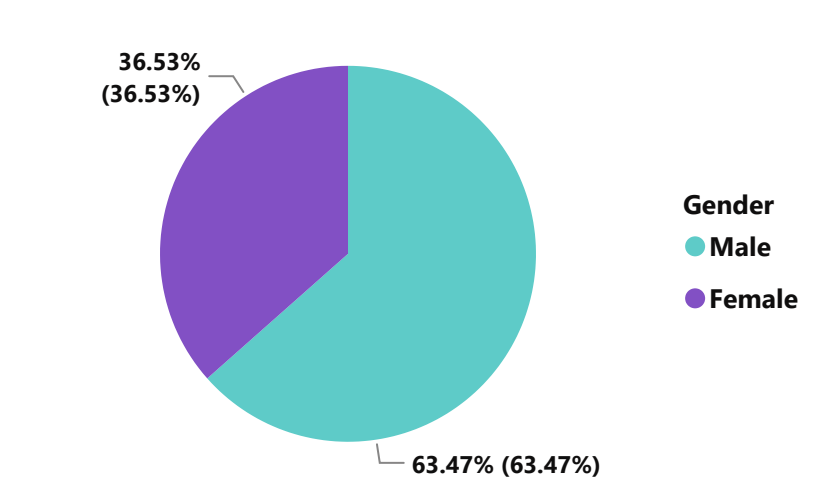
Female	<div>Sum of Mutual_Funds</div> <div>820</div>	<div>Sum of Government_Bonds</div> <div>1K</div>	<div>Sum of Equity_Markets</div> <div>1K</div>
Male	<div>Sum of Mutual_Funds</div> <div>1K</div>	<div>Sum of Government_Bonds</div> <div>2K</div>	<div>Sum of Equity_Markets</div> <div>2K</div>

gender	Equity_Market	Government_Bonds	Mutual_Funds
Female	1	6	2
Male	1	7	2
Female	2	3	1
Female	2	4	1
Female	2	5	3
Male	2	4	3
Female	3	1	4
Female	3	4	2
Female	3	5	2
Male	3	4	1
Male	3	4	2

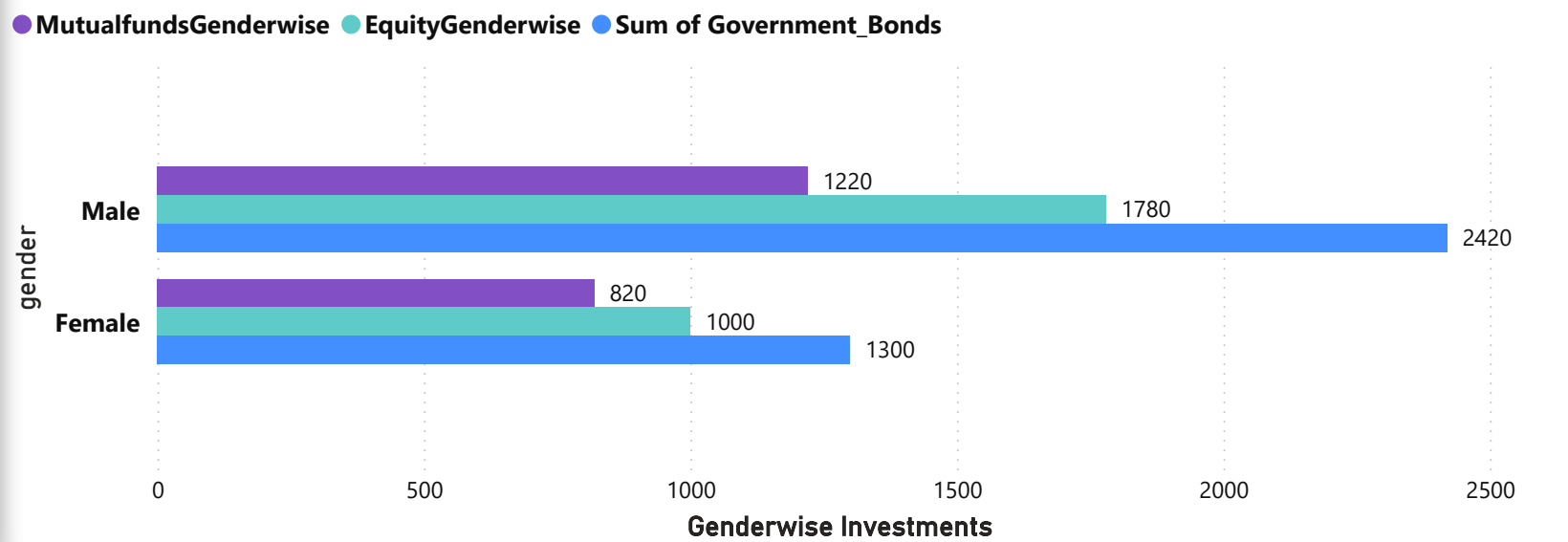
Sum of Investments Based on Gender



InvestmentsbyGender

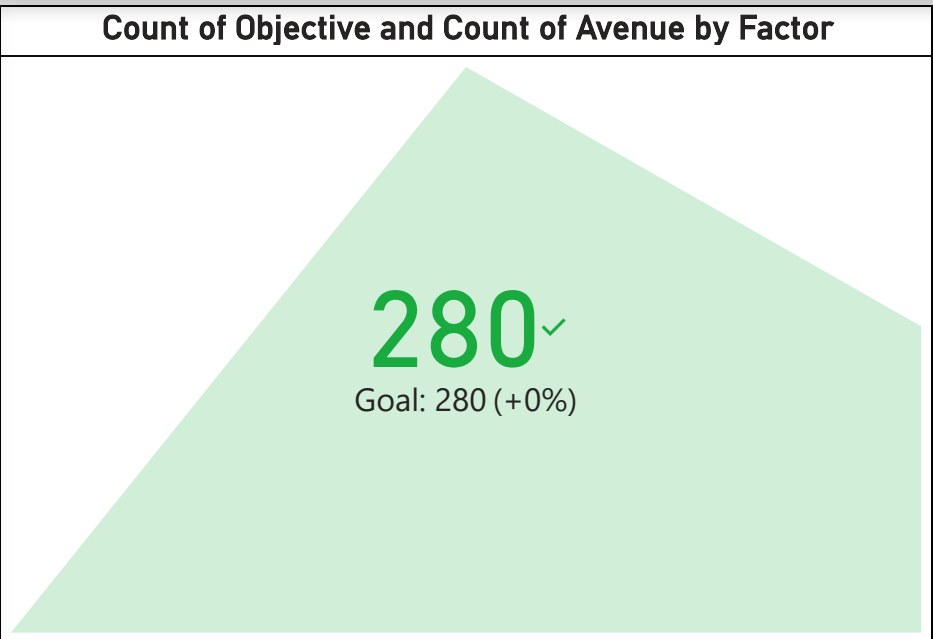
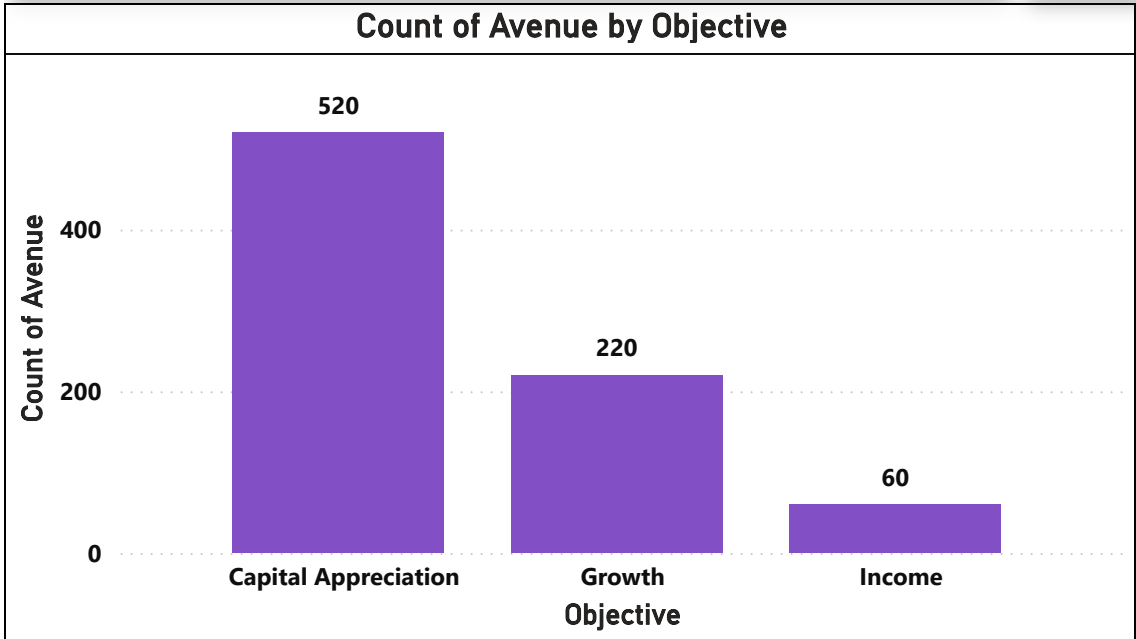
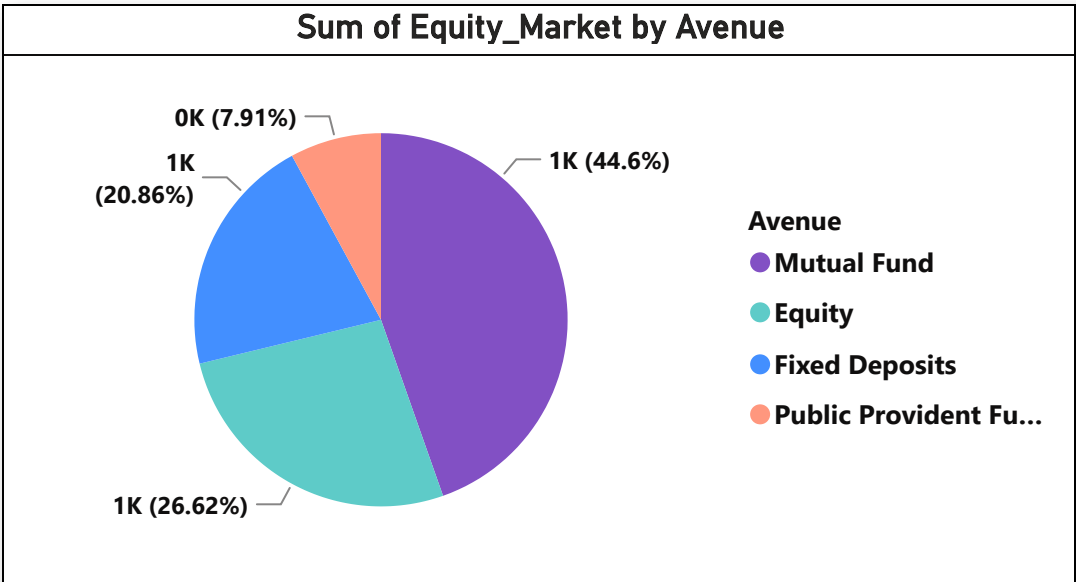
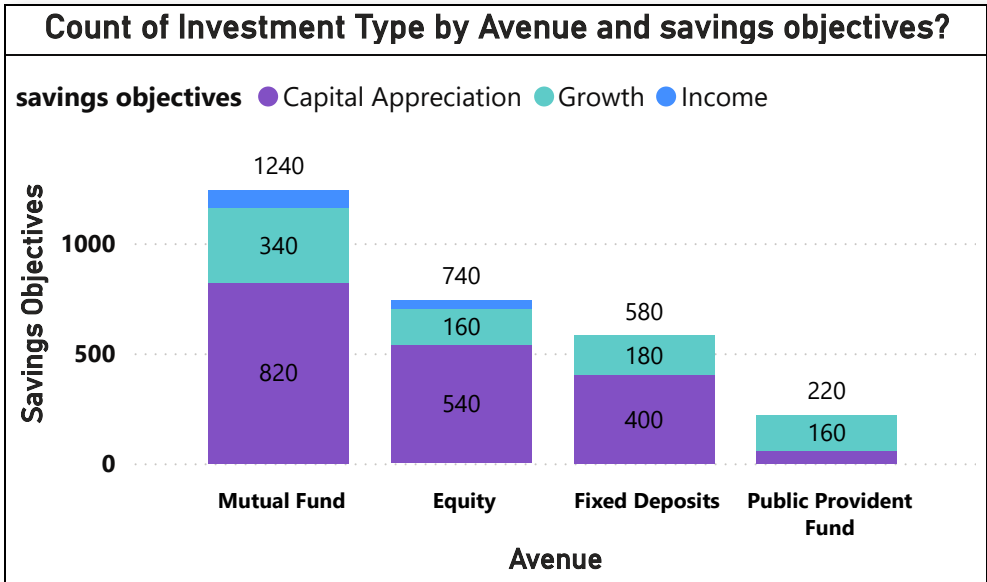


Investment Choices based on Gender



OBJECTIVE ANALYSIS

Savings Objective Vs. Investment Analysis



Gender ▼

☐ Female

☐ Male

Age ▼

21

35



Objective ▼

☐ Capital Appreciation

☐ Growth

☐ Income

Savings objectives ▼

☐ Education

☐ Health Care

☐ Retirement Plan

Avenue ▼

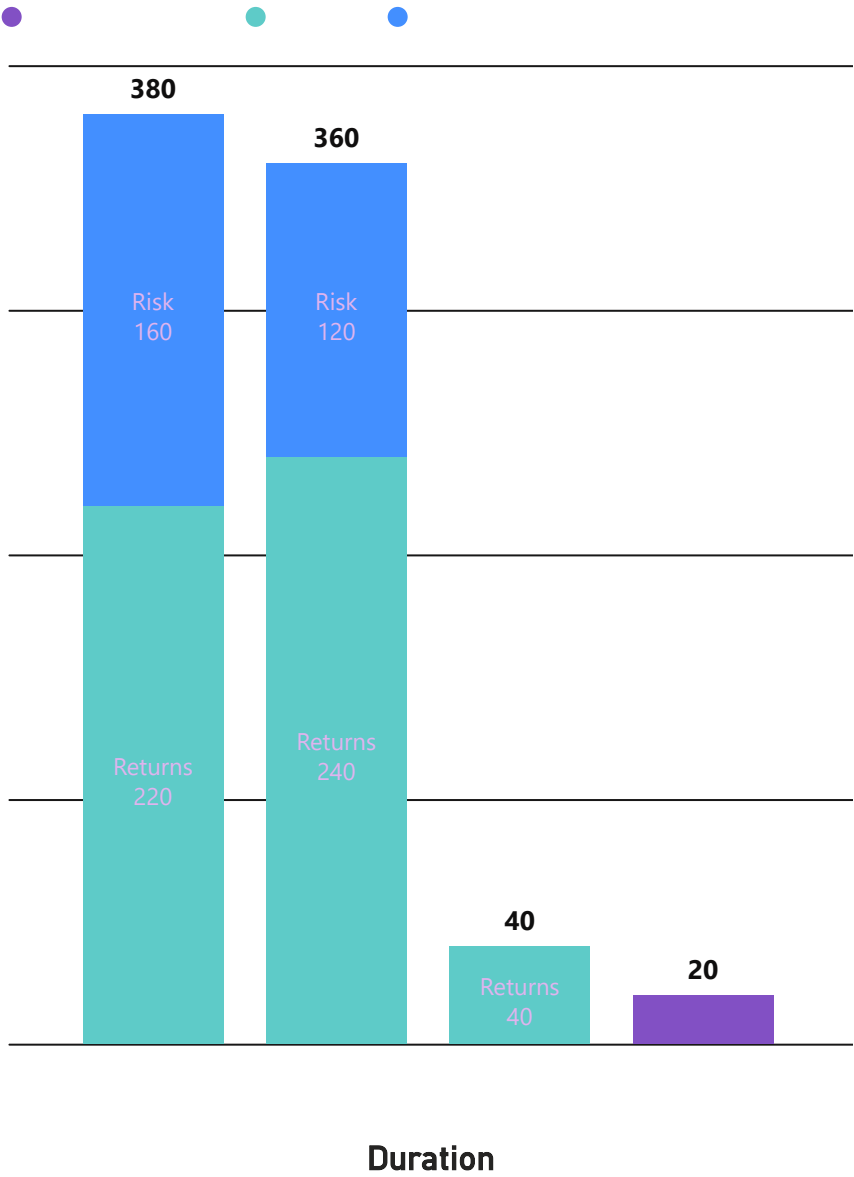
☐ Equity

☐ Fixed Deposits

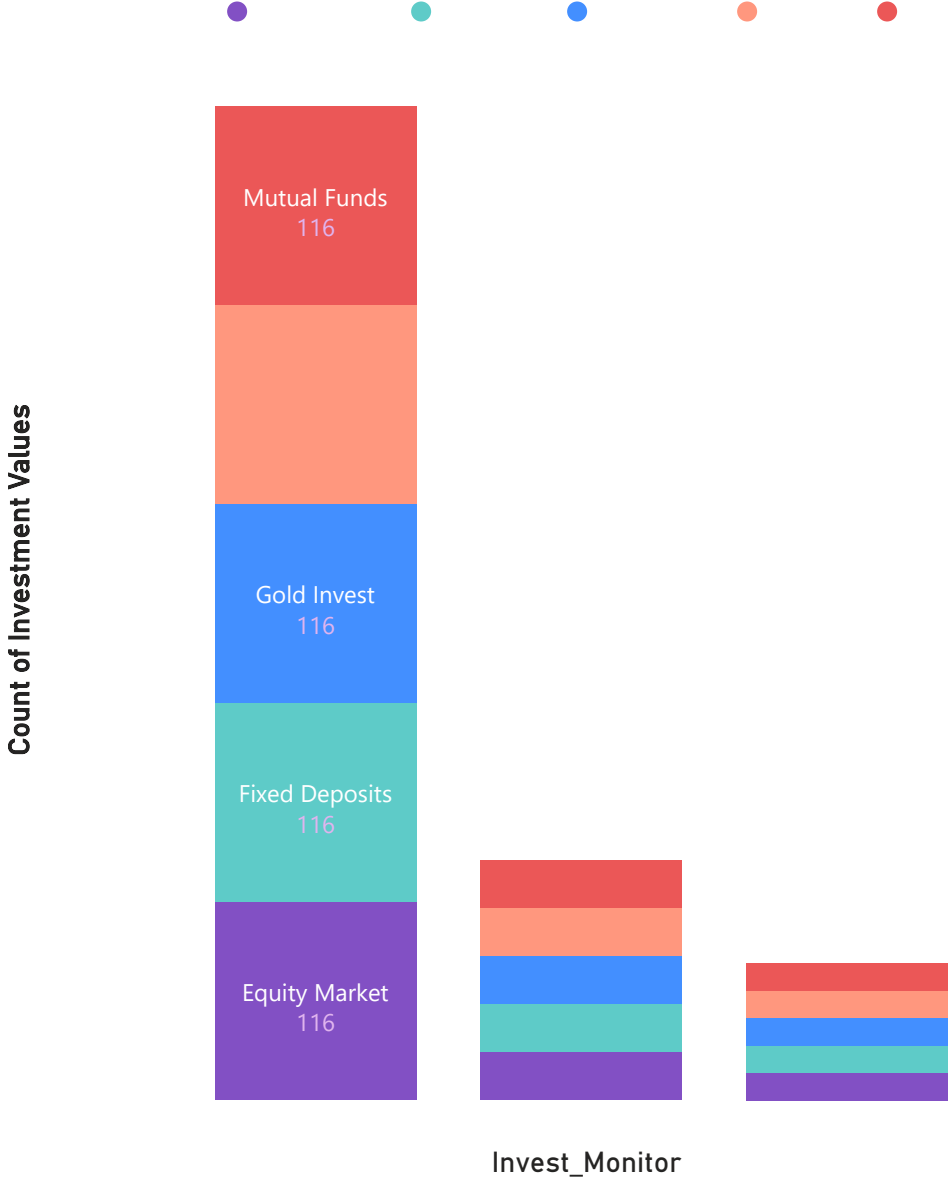
☐ Mutual Fund

☐ Public Provident Fund

Count of Investment Values by Duration and Factor



Count of Investment Values by Invest_Monitor and Investment Type



Duration

- ☐ Select all
- ☐ 1-3 years
- ☐ 3-5 years
- ☐ Less than 1 year
- ☐ More than 5 years

Investment Type

- ☐ Equity Market
- ☐ Fixed Deposits
- ☐ Gold Invest
- ☐ Government Bonds
- ☐ Mutual Funds

Invest_Monitor

- ☐ Daily
- ☐ Monthly
- ☐ Weekly

Investments Reason Analysis

AGE

21

35



Gender

Female

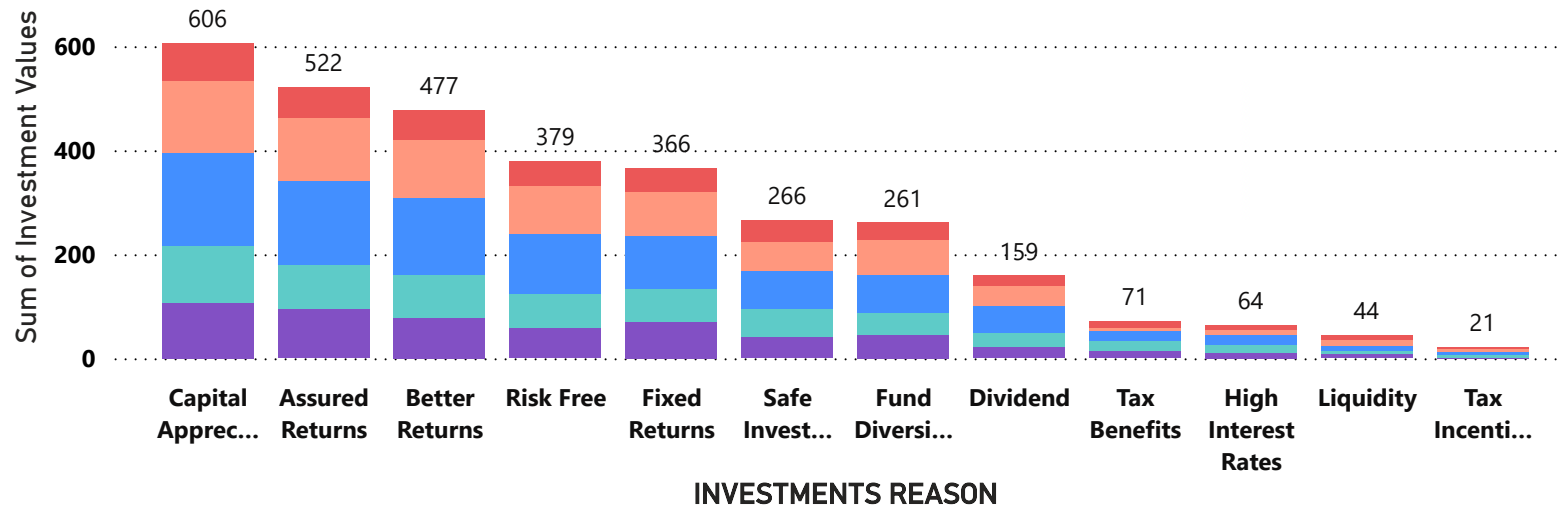
Male

TOTAL INVESTMENTS

3236

REASONS FOR INVESTMENTS

Investment Type Equity Market Fixed Deposits Gold Invest Government Bonds Mutual Funds



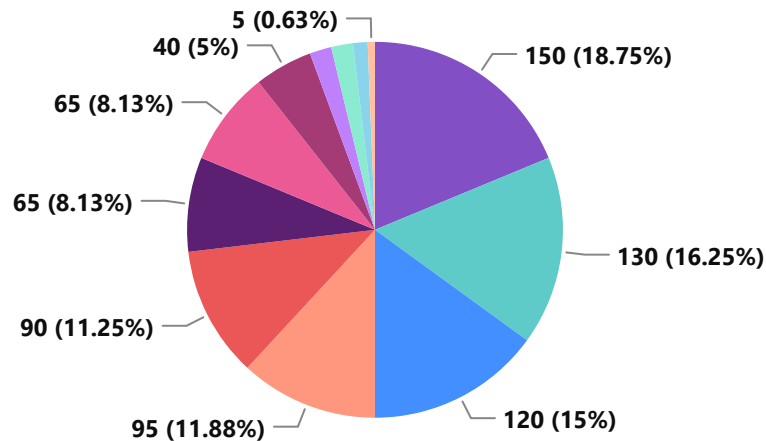
Investment Type

- ☐ Equity Market
- ☐ Fixed Deposits
- ☐ Gold Invest
- ☐ Government Bonds
- ☐ Mutual Funds

Investment Reason

- ☐ Assured Returns
- ☐ Better Returns
- ☐ Capital Appreciation
- ☐ Dividend
- ☐ Fixed Returns
- ☐ Fund Diversification
- ☐ High Interest Rates
- ☐ Liquidity
- ☐ Risk Free
- ☐ Safe Investment
- ☐ Tax Benefits
- ☐ Tax Incentives

Count of Investment Type by Investment Reason



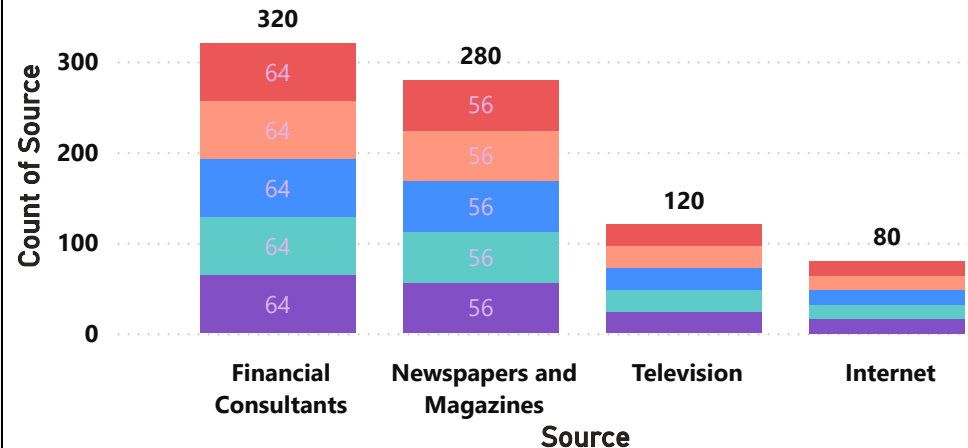
Investment Returns Reason

- Capital Appreciation
- Assured Returns
- Better Returns
- Risk Free
- Fixed Returns
- Fund Diversification
- Safe Investment

SOURCE OF INVESTMENTS

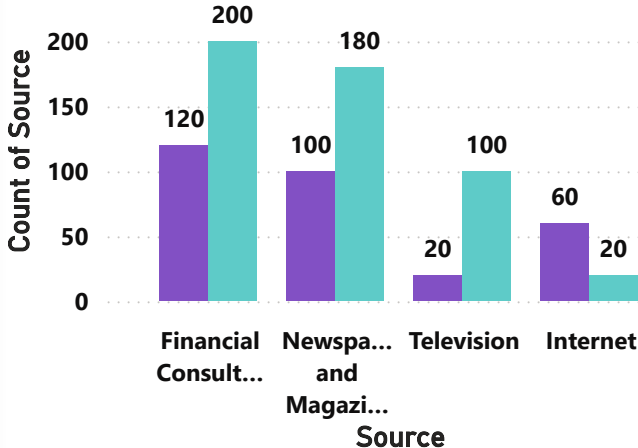
Count of Source by Investment type

Investment Type Equity ... Fixed D... Gold In... Govern... Mutual ...



Count of Source by gender

Gender Female Male



Gender

- ☐ Female
☐ Male

Age

21

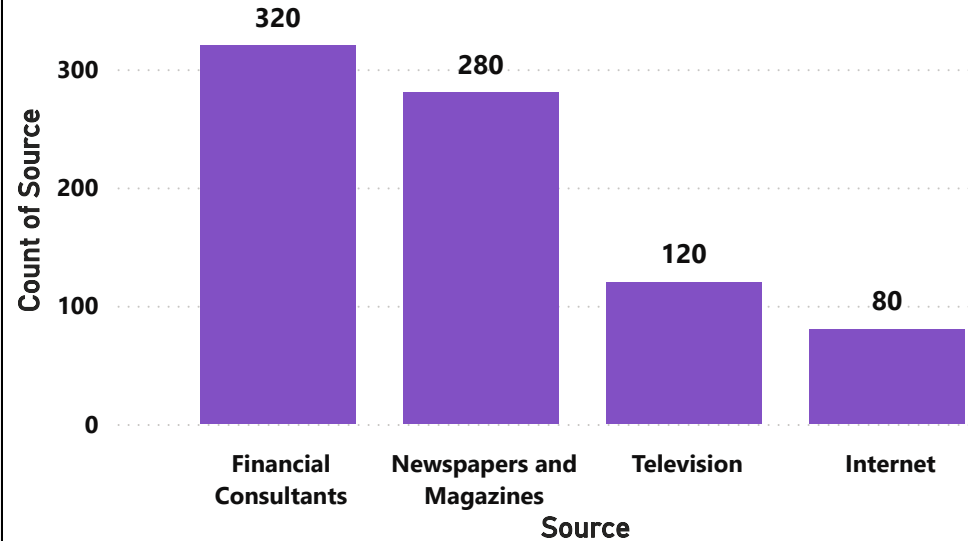
35



800

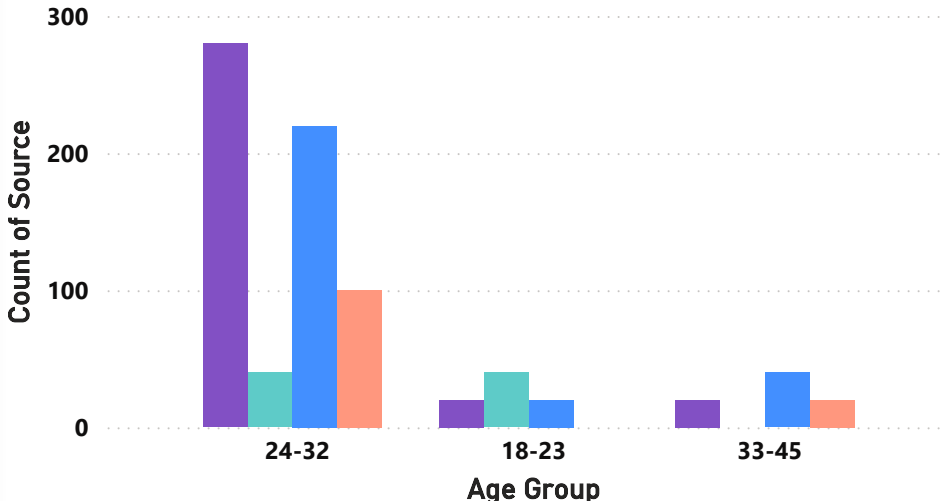
Count of Source

Count of Source



Count of Source by Age group

Source Financial Consultants Internet Newspapers an... Television



Investment Type

- ☐ Equity Market
☐ Fixed Deposits
☐ Gold Invest
☐ Government Bonds
☐ Mutual Funds

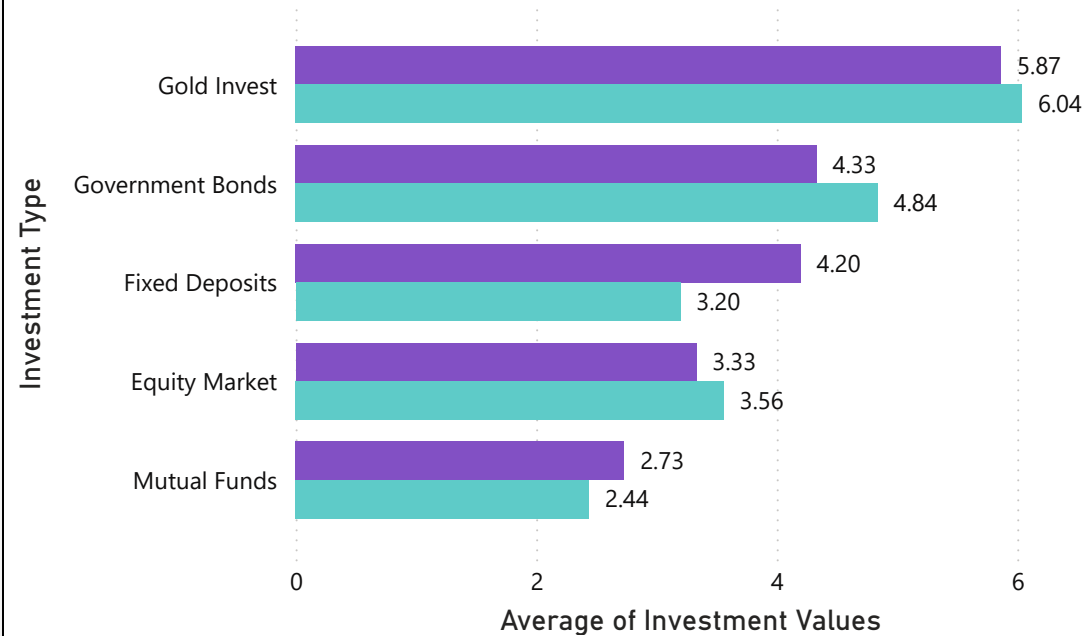
Source

- ☐ Financial Consultants
☐ Internet
☐ Newspapers and M...
☐ Television

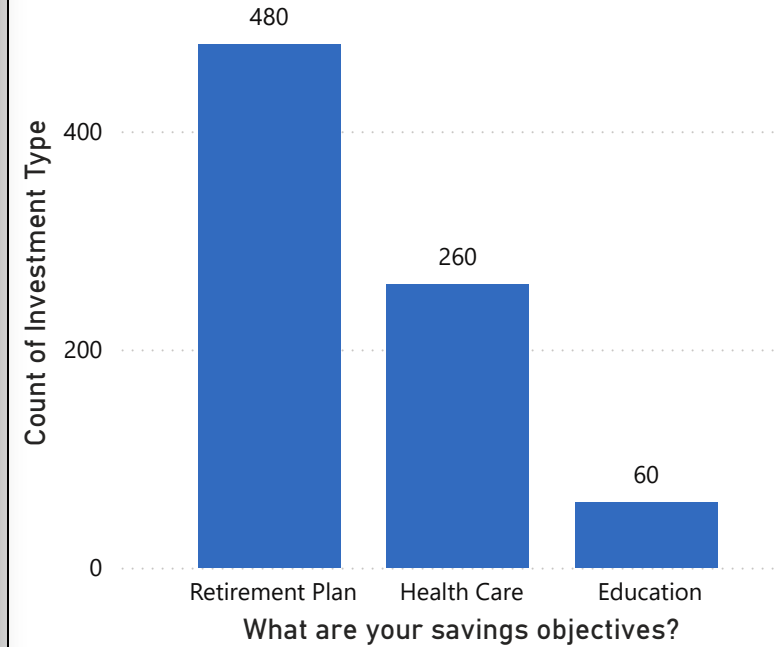
Investment Insights Dashboard

Average of Investment Values by Investment Type and gender

gender ● Female ● Male



Count of Investment Type by What are your savings objectives?



Popular Investment Type

Mutual Funds

Capital Appreciation

Top_Investment_Reason

Average Investment Duration

1-3 years

Age Group

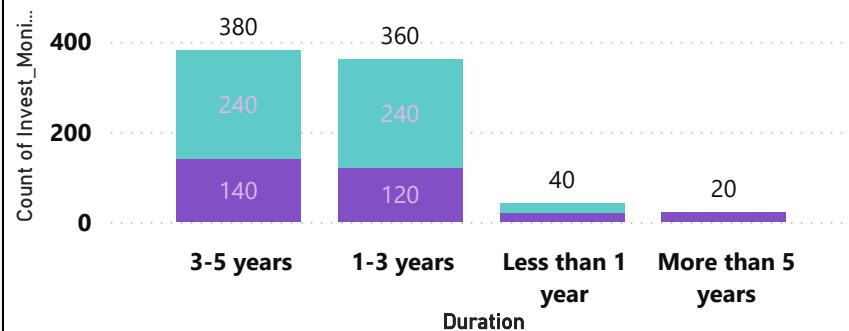
- ☐ 18-23
- ☐ 24-32
- ☐ 33-45

gender

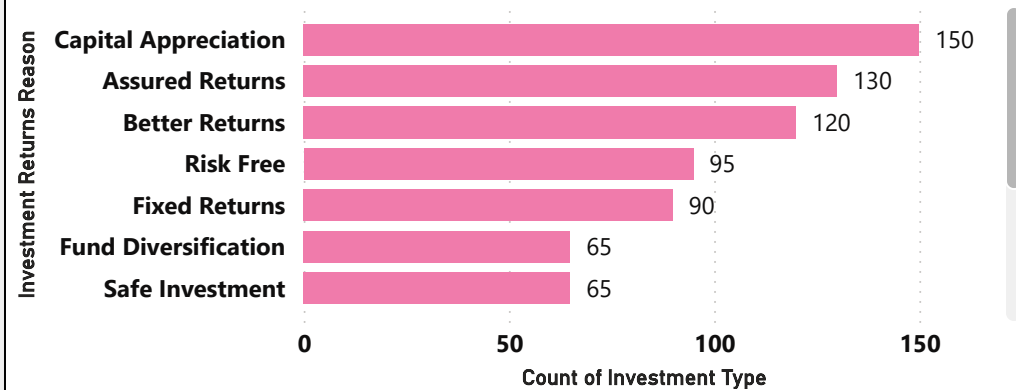
- ☐ Female
- ☐ Male

Count of Invest_Monitor by Duration and gender

gender ● Female ● Male



Count of Investment Type by Investment Returns Reason



Investment Type

- ☐ Equity Market
- ☐ Fixed Deposits
- ☐ Gold Invest
- ☐ Government Bonds
- ☐ Mutual Funds

Final Insights & Closing Points from the Investment Dashboard

Based on the **Power BI Dashboard** insights, here are the **key takeaways** and **final conclusions**:

1. Investment Preferences & Gender-Based Trends

- **Most Popular Investment Type: Mutual Funds** are the most commonly chosen investment type.
- **Gender-Based Investment Behavior:**

Men invest more in Gold , Government Bonds , and Equity .

Women have a more balanced investment approach but prefer Gold and Fixed Deposits .

Fixed Deposits and Government Bonds are popular among both genders for **stable returns**.

2. Savings Objectives & Investment Choices

- **Top Savings Objective: Retirement Planning** is the primary reason for investment.
- **Other Savings Goals:**
- **Health Care:** 260 investors.
- **Education:** 60 investors.
- **Conclusion:** Most investors focus on **long-term financial security over short-term gains**.

3. Investment Duration & Monitoring Frequency

- **Average Investment Duration: 1-3 years** is the most common investment holding period.
- **Monitoring Habits by Gender:**
 - Men & Women actively monitor** their investments in the **1-3 years and 3-5 years** range.
 - Very few investors hold investments for **less than 1 year or more than 5 years**.
- **Conclusion:** Investors prefer **mid-term investment strategies** with regular monitoring.

4. Reasons for Investment

- **Top Investment Motivation: Capital Appreciation** is the leading reason.
- **Other Key Investment Drivers:**
 - Better Returns** and **Assured Returns** are key motivators.
 - Risk-Free** and **Fixed Returns** appeal to cautious investors.
- **Conclusion:** Most investors seek **growth opportunities** while balancing risk and return.