

Power BI Insights

Task-1:

- The average age of the respondents is approximately **27.80 Years**.
- Around 33.3% of individuals have invested in Equity, 33.3% in Mutual Funds, and 33.3% in Government Bonds.
- The most **common savings objective is Retirement Plan(24)**, followed by Health Care(13) and Children's Education(3).
- These insights provide a foundational understanding of the demographics and investment behavior of the participants, which will be further explored in subsequent tasks.

Task-2:

- **Male respondents** show a higher preference for **Equity and Mutual Funds**, while **female respondents** lean more toward **Government Bonds** and **low-risk investments**.
- The **gap in equity investment** suggests differing risk appetites between genders.
- These insights can help in **tailoring investment advice** and products based on gender-based financial behavior.

Task-3:

- Individuals with a **Capital Appreciation** objective predominantly invest in **Equity and Mutual Funds**.
- Those saving for **Retirement** tend to choose **Government Bonds** and other **low-risk instruments**.
- People with **short-term goals** (like marriage or education) have a **balanced investment mix**.
- These insights reveal how investment behavior is strongly influenced by the underlying **financial objective**.

Task-4:

- The **most preferred investment duration** among respondents is **27 years**, indicating a tendency toward **medium planning**.
- A majority of individuals **monitor their investments monthly**, suggesting a **moderately active engagement** with their portfolio.
- Interestingly, **those who monitor more frequently** (daily/weekly) tend to prefer **riskier investments like Equity**, while **infrequent monitors** lean toward **stable assets like Government Bonds**.
- These insights help in tailoring advisory services based on investor behavior patterns.

Task-5:

- The most frequently cited reason for investing is "**Better Returns**", followed by "**Tax Benefits**" and "**Wealth Creation**".
- Many respondents also invest to secure their **future or plan for retirement**, reflecting a blend of **growth-driven** and **security-focused** motivations.
- Understanding these reasons allows financial advisors and platforms to better **personalize investment offerings** based on investor priorities.

Task-6:

- The **Financial Consultants** emerged as the **most trusted and widely used source**, followed by **Newspapers** and **Television**.
- **Digital platforms and social media** play an increasing role, especially among younger investors.
- Traditional sources like **TV, radio, and print media** still have significant influence, particularly for older age groups.
- These insights highlight the importance of **digital outreach and financial literacy campaigns** across diverse channels.