**Pre-Report**

**1. Problem Statement**

The purpose of this analysis is to understand investor behaviour, preferences, and financial goals, particularly across demographics and age groups. The findings aim to identify patterns, motivations, and preferences in investment decisions, enabling the creation of an insightful Power BI dashboard for effective storytelling and actionable insights.

**2. Data Requirement**

Based on the dashboard, the required data focuses on:

* Demographics: Gender and age group distribution.
* Investment Preferences: Popular financial instruments such as mutual funds, equities, government bonds, and gold.
* Savings Objectives: Specific goals like retirement planning, health care, and education.
* Purpose of Investment: Motivations such as wealth creation, savings for the future, and high returns.
* Stock Market Interest: Analysis of people interested in equity markets.

**3. Data Collection**

The dataset for the analysis includes:

* Demographic Attributes: Gender and age brackets.
* Investment Avenues: Preferences for different financial instruments (debentures, equity markets, mutual funds, etc.).
* Savings Objectives: Retirement plans, health care, and education.
* Motivating Factors: Key drivers for investment like wealth creation or return expectations.
* Stock Market Engagement: Number of individuals interested in investing in stocks.

**4. Data Validation**

To ensure accuracy and reliability:

* Validate data formats (e.g., integers for age, categorical variables for gender and investment types).
* Handle missing values or inconsistencies.
* Cross-check logical relationships (e.g., respondents who have no interest in investment avenues should align with no active investments).

**5. Data Cleaning**

Key steps for data preparation:

* Standardize demographic data for consistency (e.g., uniform gender labels).
* Rename columns for better readability (e.g., “Sum of Gold” becomes “Gold Investment”).
* Remove duplicate entries and ensure logical consistency in responses.
* Handle outliers (e.g., extremely high investments not consistent with demographic patterns).

**6. Tools**

Power BI is used for this analysis due to:

* Its user-friendly interface for designing interactive dashboards.
* A wide variety of visuals, including pie charts, bar charts, and stacked graphs.
* The ability to highlight relationships and trends across datasets.

A screenshot of a computer

Description automatically generated**7. Dashboard Example**

The Power BI dashboard reflects several key insights:

Demographics Breakdown

* Gender Distribution:
  + Displayed using a pie chart: 62.5% Female and 37.5% Male.
  + A gender-based stacked column further emphasizes the breakdown.
* Age Group Distribution:
  + Highlighted through stacked visuals: Majority of contributors fall in the 25-30 age bracket.

Investment Preferences

* Avenues by Age:
  + Bar charts reveal age-wise preferences for investment instruments such as equity markets, gold, government bonds, and mutual funds.
  + The 25–30 age group shows the highest engagement across multiple avenues, followed by 30–35.

Purpose of Investment

* A horizontal bar chart categorizes respondents’ purposes:
  + Wealth Creation dominates as the primary purpose.
  + Secondary motivations include savings for the future and expected returns.

Savings Objectives by Age

* A stacked bar chart divides objectives into:
  + Retirement Plans: More prevalent among older age groups (30–35).
  + Health Care: A significant goal for all age ranges.
  + Education: Most relevant for younger respondents (0–25).

Stock Market Interest

* Engagement:
  + Depicted through a donut chart: 87.5% are interested in the stock market, while only 12.5% are not.
* Age-Wise Split:
  + A stacked chart indicates that the 25–30 age group is most inclined toward stock market investments.

**8. Storytelling**

The dashboard effectively narrates the investment behaviour and financial motivations of individuals:

* Demographics: Women constitute a larger share of investors, with a significant portion aged 25–30.
* Popular Investment Avenues: Mutual funds and equities lead among financial instruments, especially for the 25–30 age group.
* Purpose and Objectives:
  + Wealth creation is the dominant driver across demographics.
  + Savings objectives vary by age; younger groups focus on education, while older individuals prioritize health care and retirement.
* Stock Market:
  + A majority express strong interest in equity investments, particularly younger audiences.

**9. Actionable Insights**

* Target the 25–30 Age Group: Marketing and educational campaigns should focus on this group due to their high interest in diverse investment avenues and stock markets.
* Customized Offerings:
  + Retirement planning products for older demographics.
  + Health care and education-oriented savings plans for younger groups.
* Gender-Based Campaigns:
  + Design products tailored to women, who represent a significant investor base.