

Task 1 : Data Exploration and Summary

27.80

Average of age

37

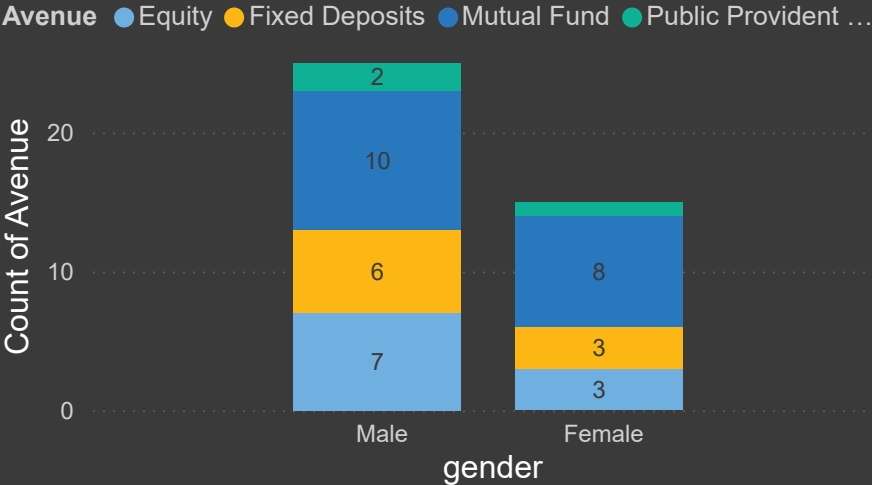
Investment Avenue

3

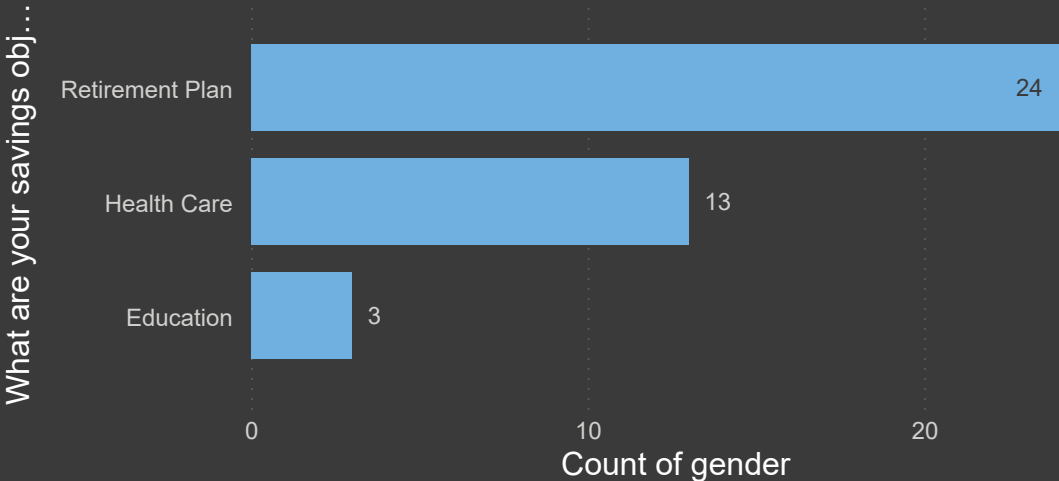
No Investment Avenue

- Avenue ▼
- ☐ Select all
 - ☐ Equity
 - ☐ Fixed Deposits
 - ☐ Mutual Fund
 - ☐ Public Provident Fund

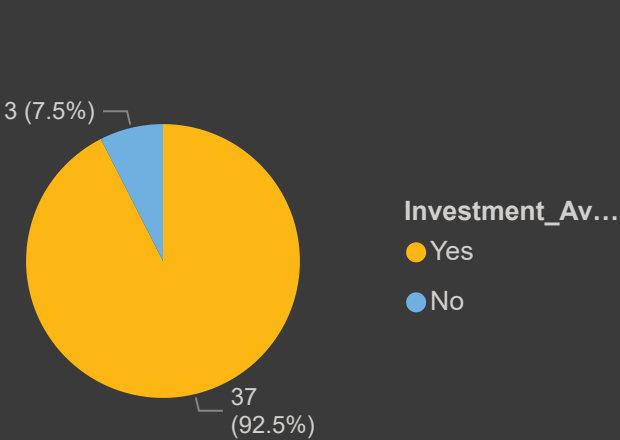
Count of Avenue by gender



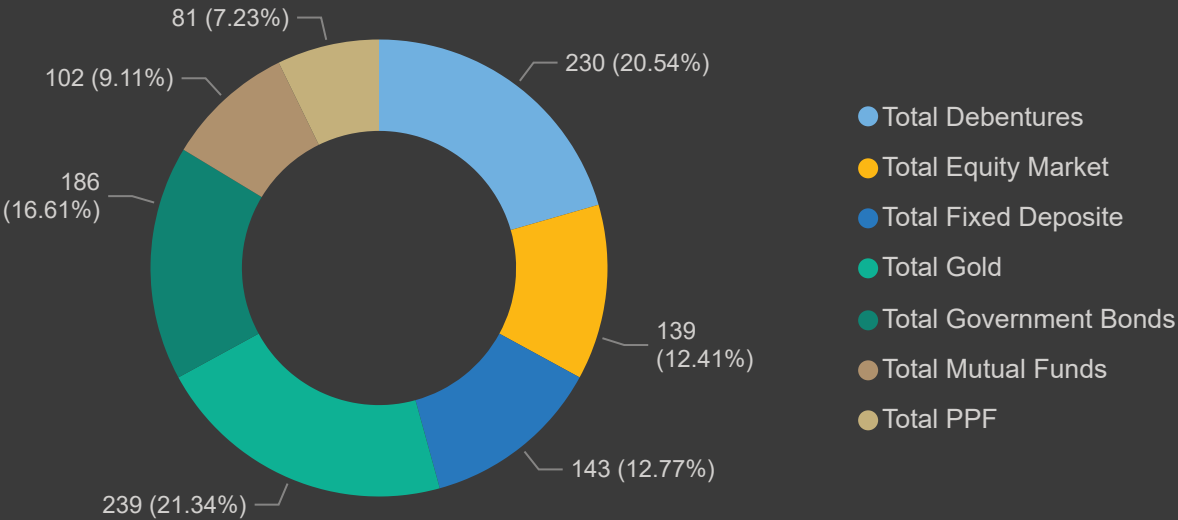
Gender by Saving Objectives



Count of Gender by Avenue



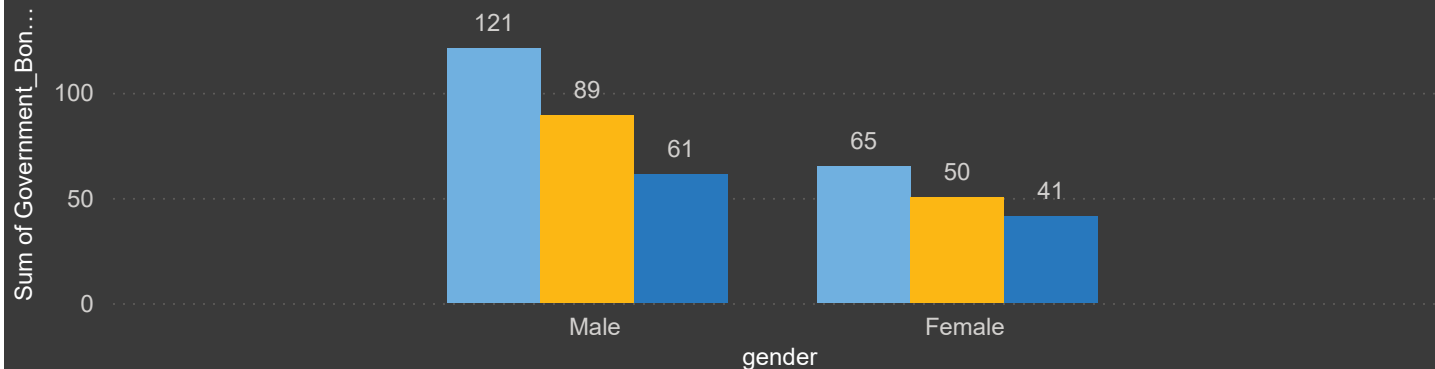
Total Investments



Task 2 : Gender based Analysis

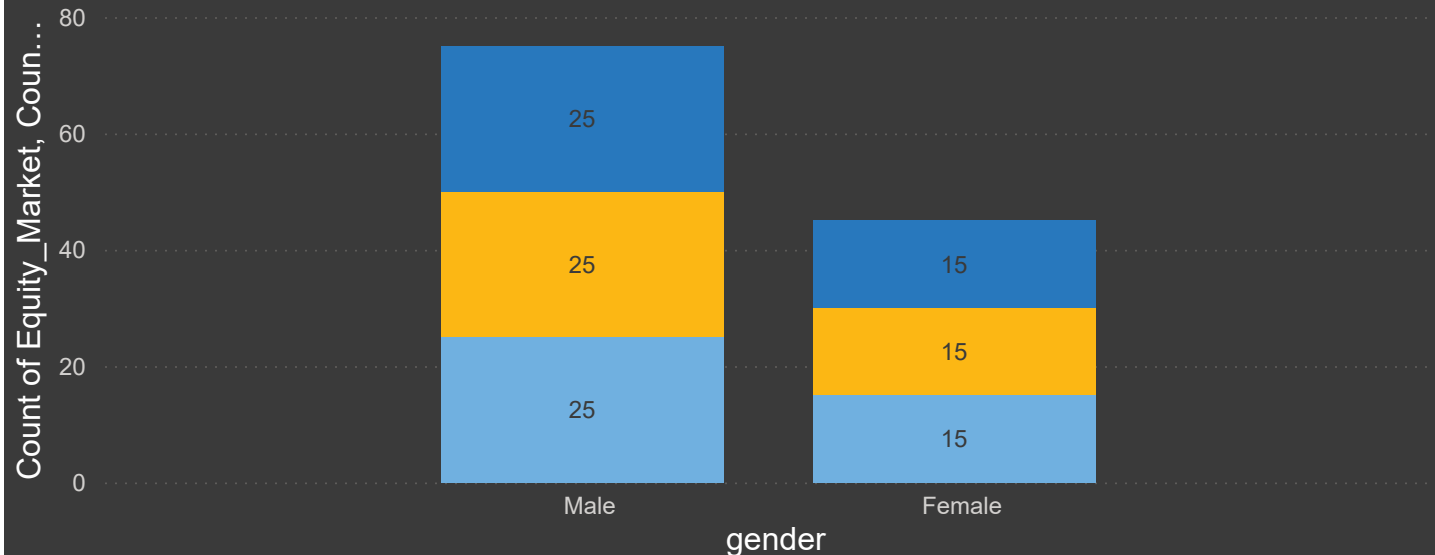
Sum of Government_Bonds, Sum of Equity_Market and Sum of Mutual_Funds by gender

Sum of Government_Bonds Sum of Equity_Market Sum of Mutual_Funds



Count of Equity_Market, Count of Mutual_Funds and Count of Government_Bonds by gender

Count of Equity_Market Count of Mutual_Funds Count of Government_Bonds



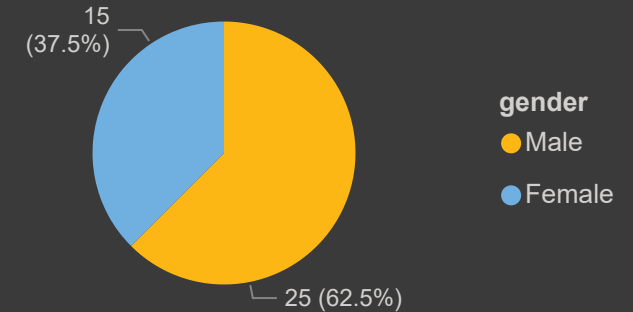
25

Male

15

Female

Count of Avenue by gender



Insights :

- Here are 25 males and 15 Females who are involved in Various Investments.
- Sum of Government Bonds and total Sum of Equity Market are positively correlated with each other.
- Count of Avenue for Male (25) was higher than Female (15).

Females :

- Invested in equity Market = 50
- Invested in Mutual Funds = 41
- Invested in Government Bonds = 65

Males :

- Invested in equity Market = 89
- Invested in Mutual Funds = 61
- Invested in Government Bonds = 121

Task 3 : Objective Analysis

Avenue

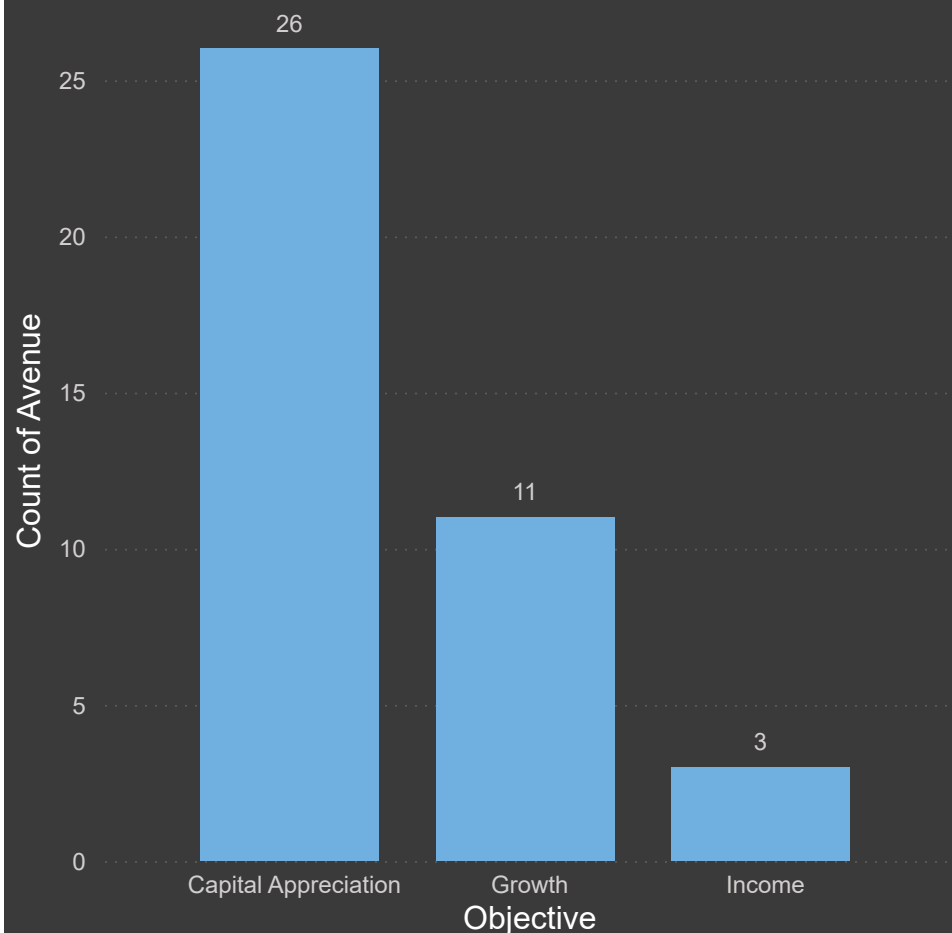
Equity

Fixed Deposits

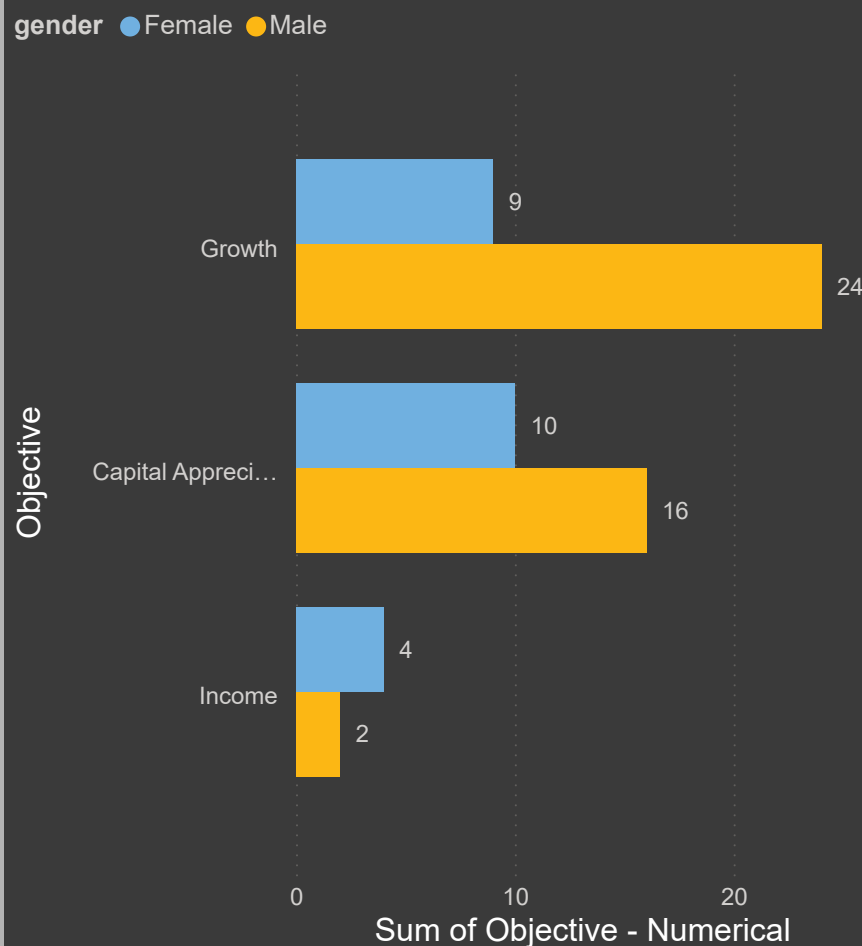
Mutual Fund

Public Provident Fund

Count of Avenue by Objective



Objective by Gender



0.20

Pearson Correlation

Insights :

- At 26, Capital Appreciation had the highest Count of Avenue and was 766.67% higher than Income, which had the lowest Count of Avenue at 3.
- Capital Appreciation had the highest Count of Avenue at 26, followed by Growth at 11 and Income at 3.
- Capital Appreciation accounted for 65.00% of Count of Avenue.
- In this comparison of Avenue and Objective we got:
 - Capital Appreciation = 26
 - Growth = 11
 - Income = 3

Task 4 : Investment Duration and Frequency

10

Equity

9

Fixed Deposits

3

Public Provident Fund

18

Mutual Fund

Avenue

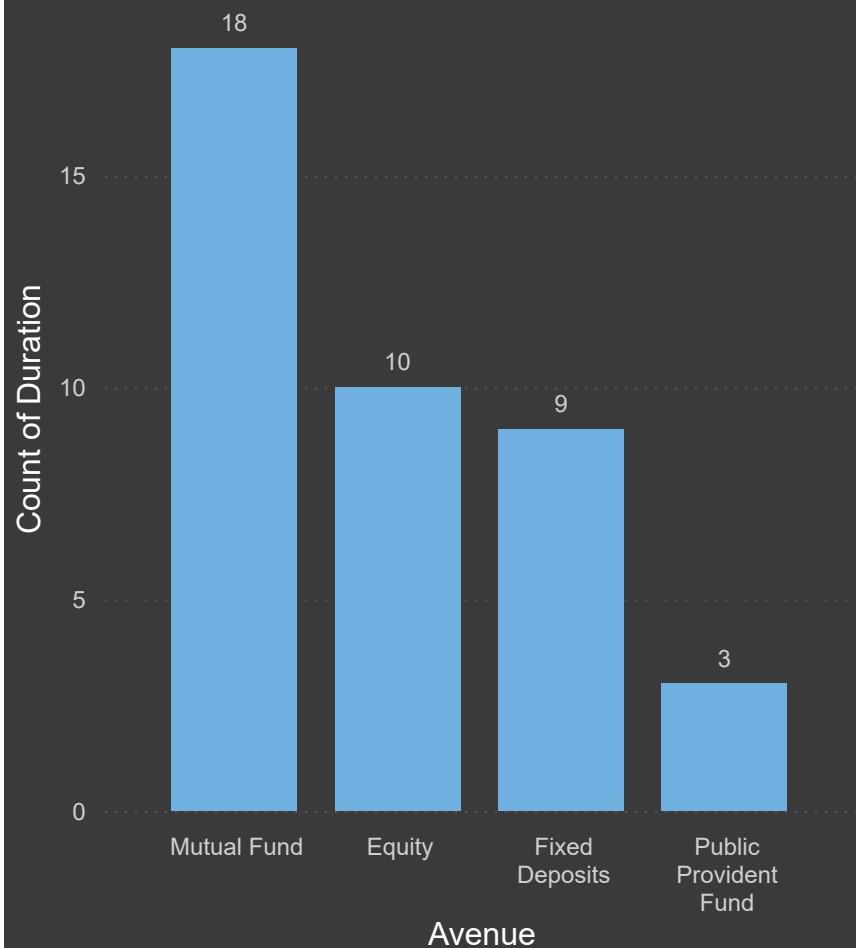
Equity

Mutual Fund

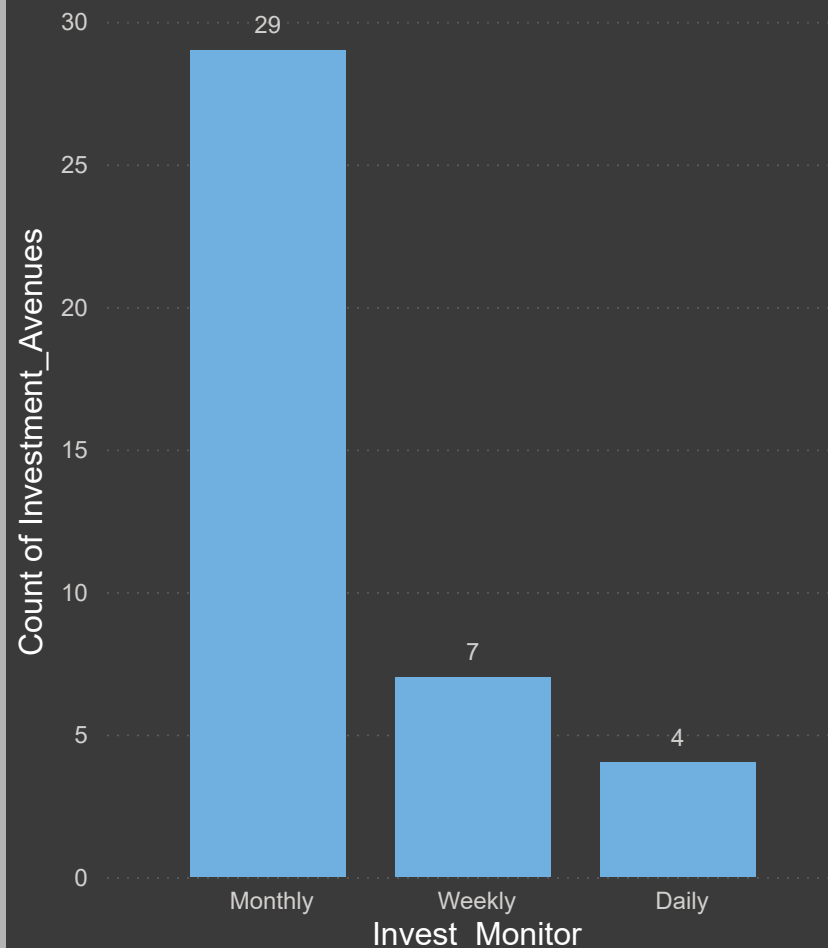
Fixed Deposits

Public Provident Fund

Count of Duration by Avenue



Count of Investment_Avenues by Invest_Monitor



Insights :

- At 19, 3-5 years had the highest Count of Avenue and was 1,800.00% higher than More than 5 years, which had the lowest Count of Avenue at 1.
- 3-5 years had the highest Count of Avenue at 19, followed by 1-3 years, Less than 1 year, and More than 5 years.
- 3-5 years accounted for 47.50% of Count of Avenue.
- Across all 4 Duration, Count of Avenue ranged from 1 to 19.

Task 5 : Reasons for Investment

Reason_Mutual



- ☐ Better Returns
- ☐ Fund Diversification
- ☐ Tax Benefits

Factor



- ☐ Locking Period
- ☐ Returns
- ☐ Risk

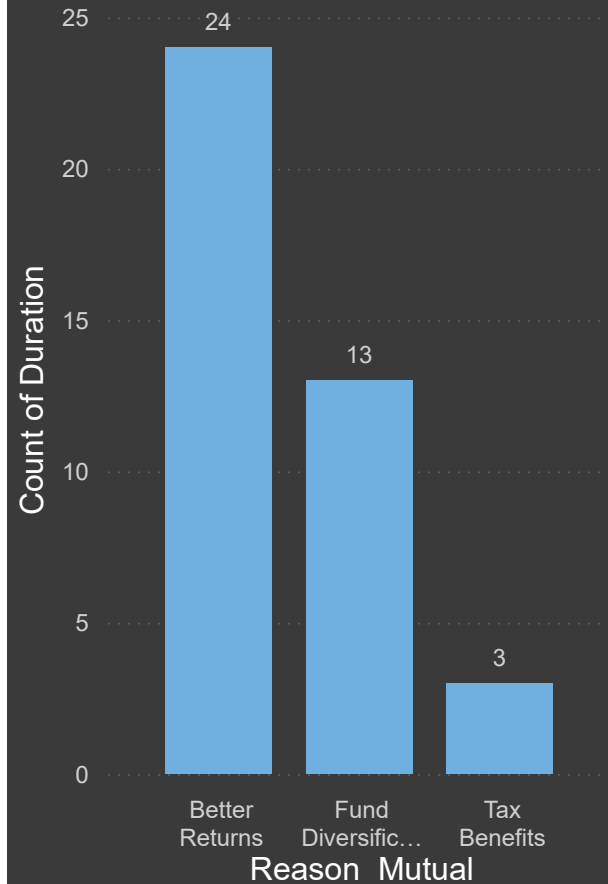
Insights :

At 24, Better Returns had the highest Count of Duration and was 700.00% higher than Tax Benefits, which had the lowest Count of Duration at 3. Better Returns had the highest Count of Duration at 24, followed by Fund Diversification at 13 and Tax Benefits at 3.

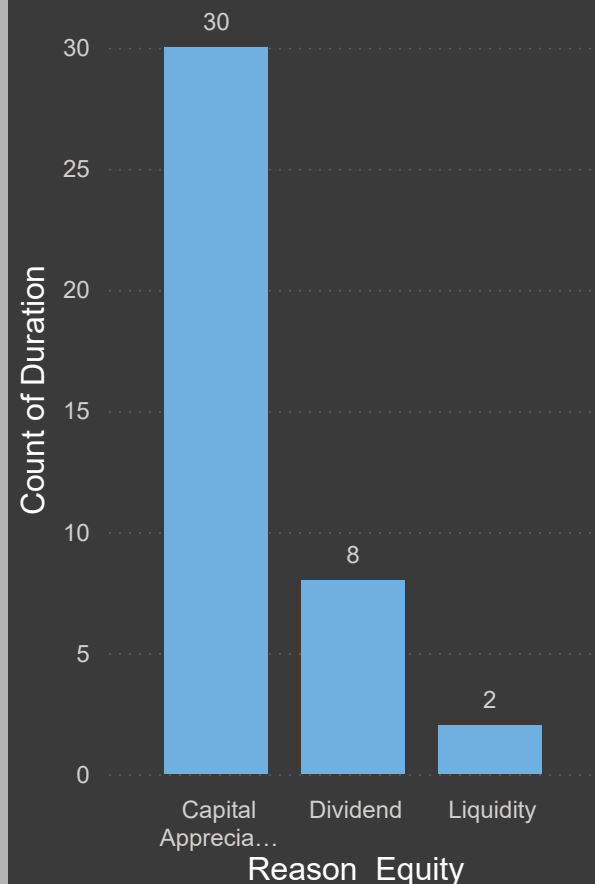
Better Returns accounted for 60.00% of Count of Duration.

Better Returns had 24 Count of Duration, Tax Benefits had 3, and Fund Diversification had 13.

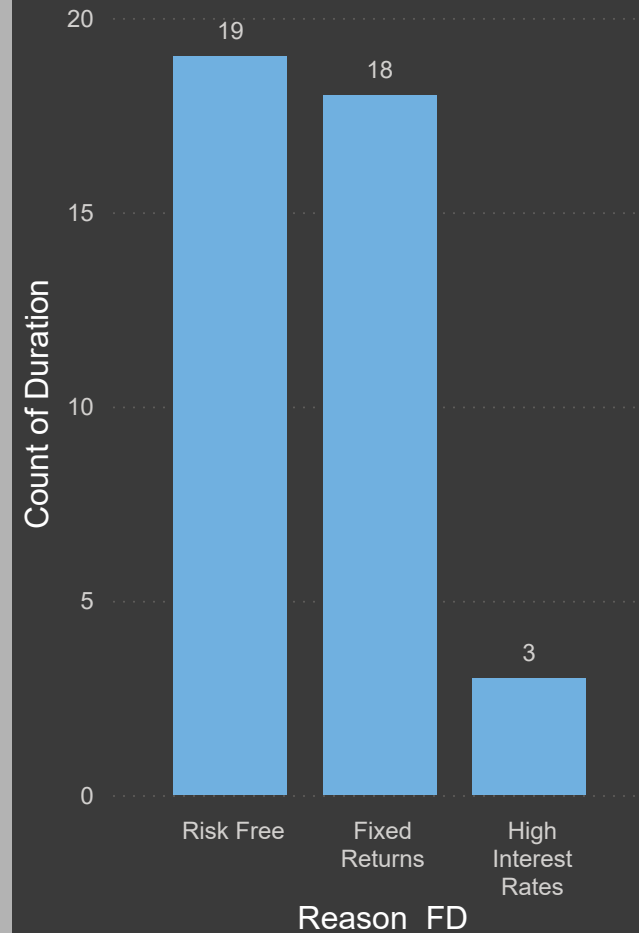
Count of Duration by Reason_Mutual



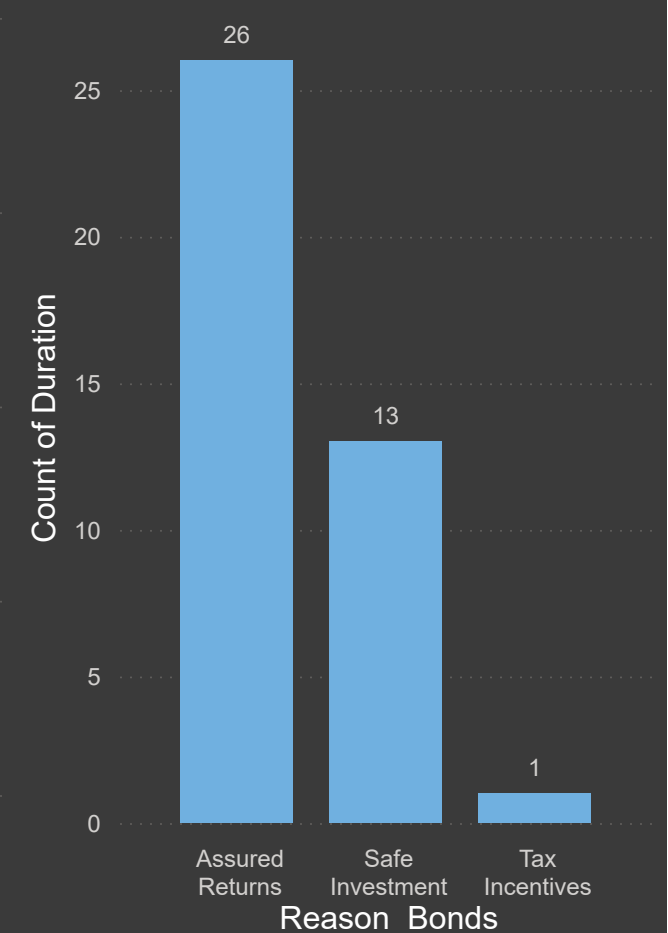
Count of Duration by Reason_Equity



Count of Duration by Reason_FD



Count of Duration by Reason_Bonds



Task 6 : Source of Information

Source

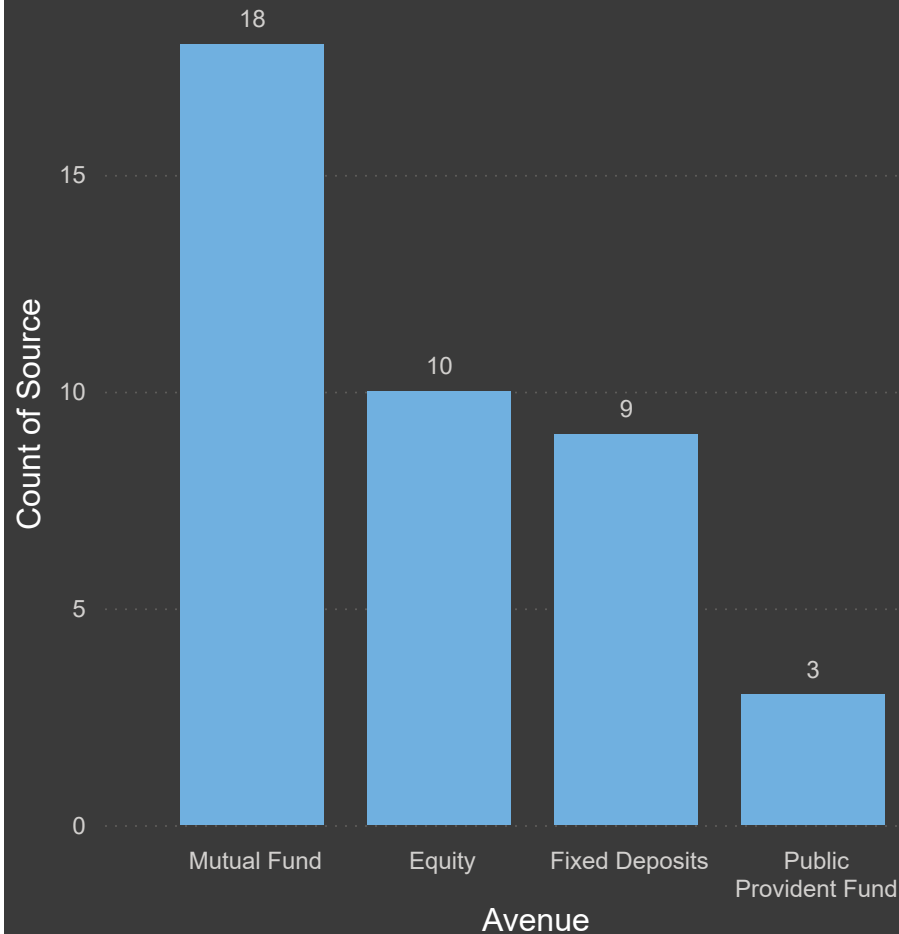
Financial Consultants

Internet

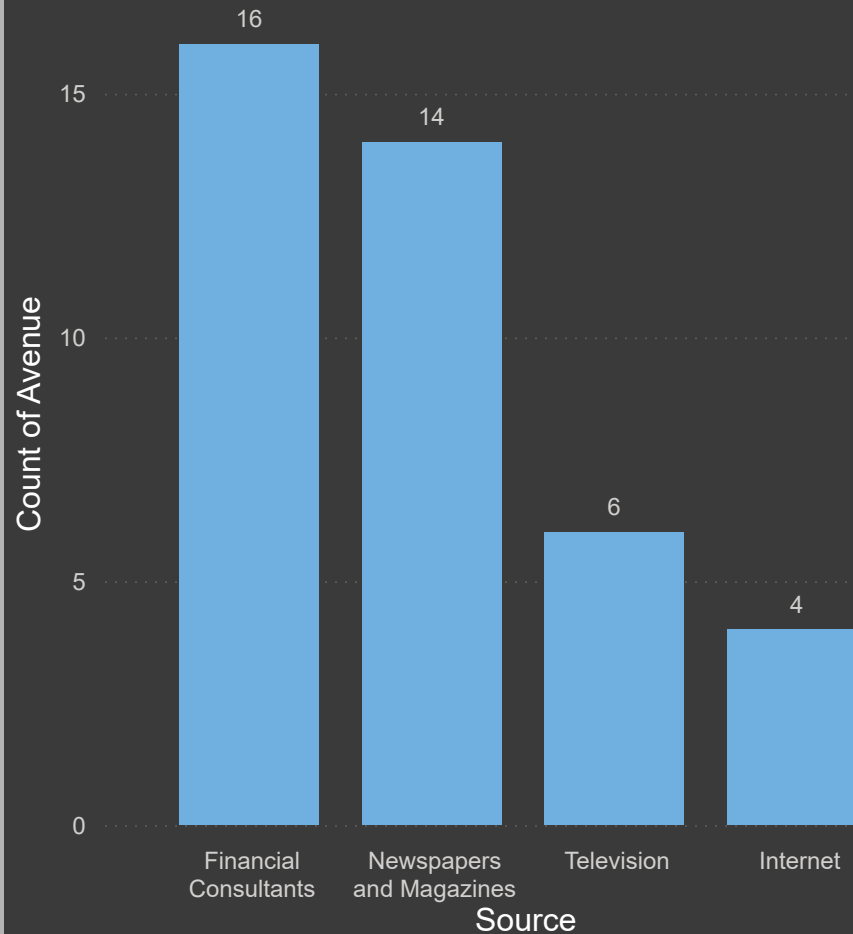
Newspapers and Magazines

Television

Count of Source by Avenue



Count of Avenue by Source



Insights :

- According to Source By Avenue, Mutual Funds are high compared to Equity, Fixed Deposits and Public Provident Fund.
- According to Source by Avenue, Financial Consultants are high as compared to Newspapers and magazines followed by television and Internate
- Across all 4 Avenue, Count of Source ranged from 3 to 18.

Task 7 : Combine Insights into a Dashboard

27.80

Average of age

25

Male

15

Female

Reason_Mutual



- ☐ Better Returns
- ☐ Fund Diversification
- ☐ Tax Benefits

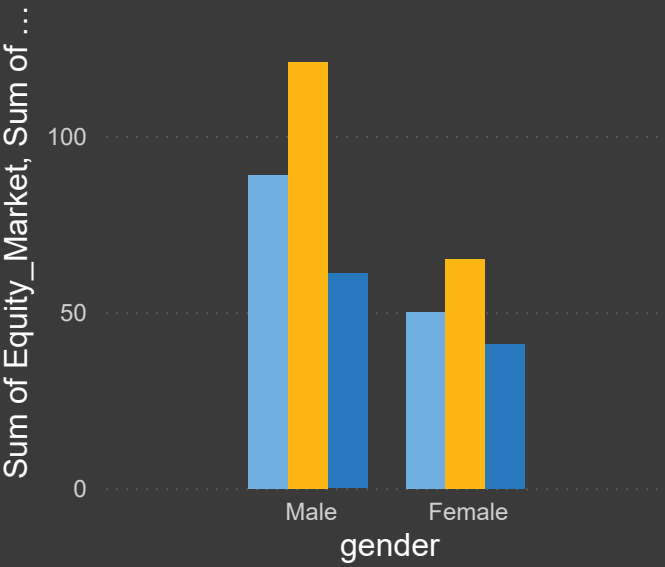
Avenue



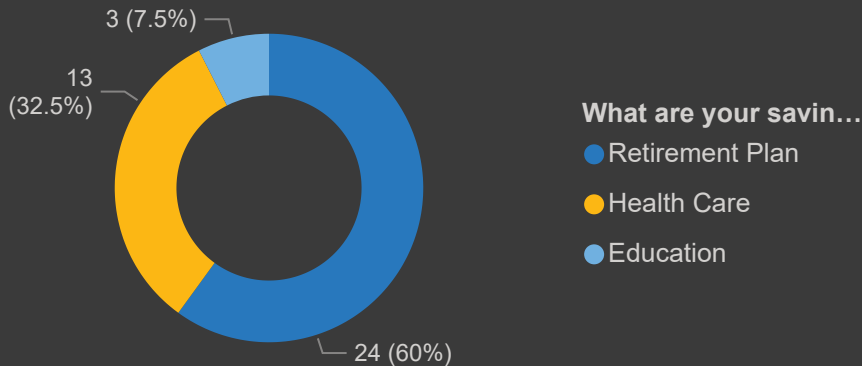
- ☐ Equity
- ☐ Fixed Deposits
- ☐ Mutual Fund
- ☐ Public Provident F...

Sum of Equity_Market, Sum of Government_Bonds and Sum of Mutual_Funds by gender

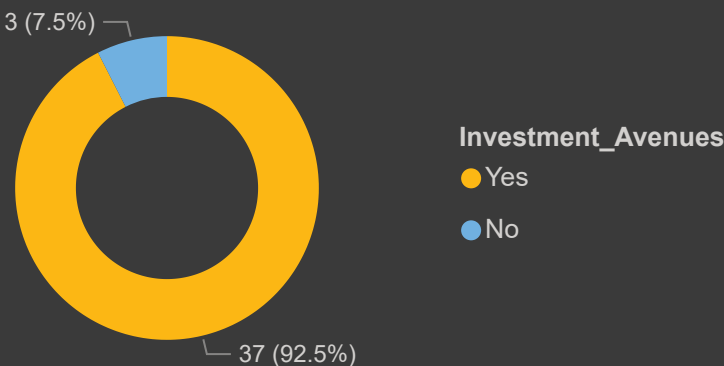
Sum of Equity_Market (Blue), Sum of Government_Bonds (Yellow), Sum of Mutual_Funds (Blue)



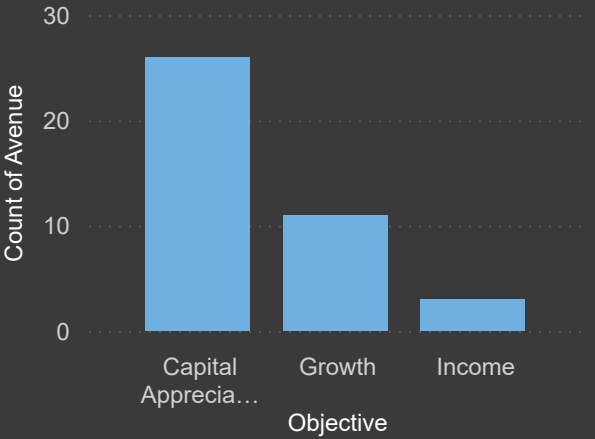
Count of gender by savings objectives



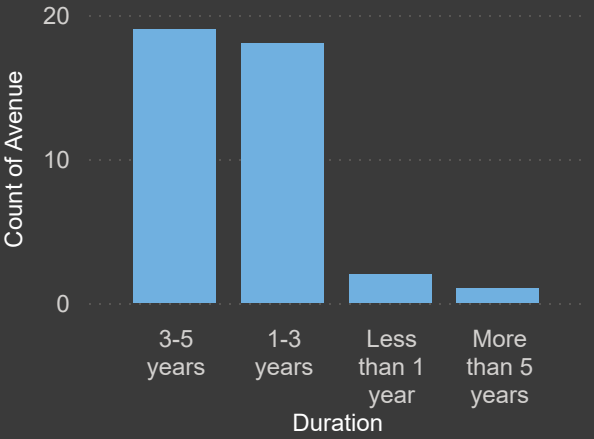
Count of gender by Investment_Avenues



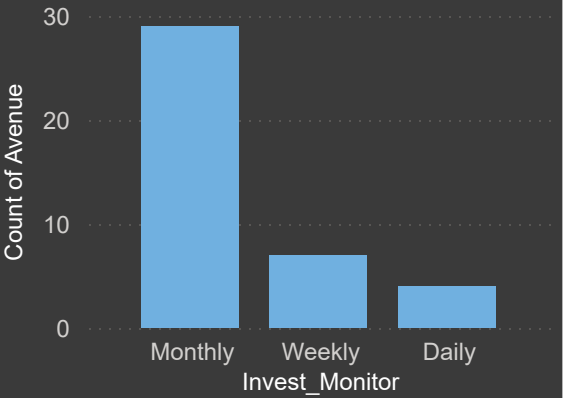
Count of Avenue by Objective



Count of Avenue by Duration



Count of Avenue by Invest_Monitor



Count of Avenue by Source

