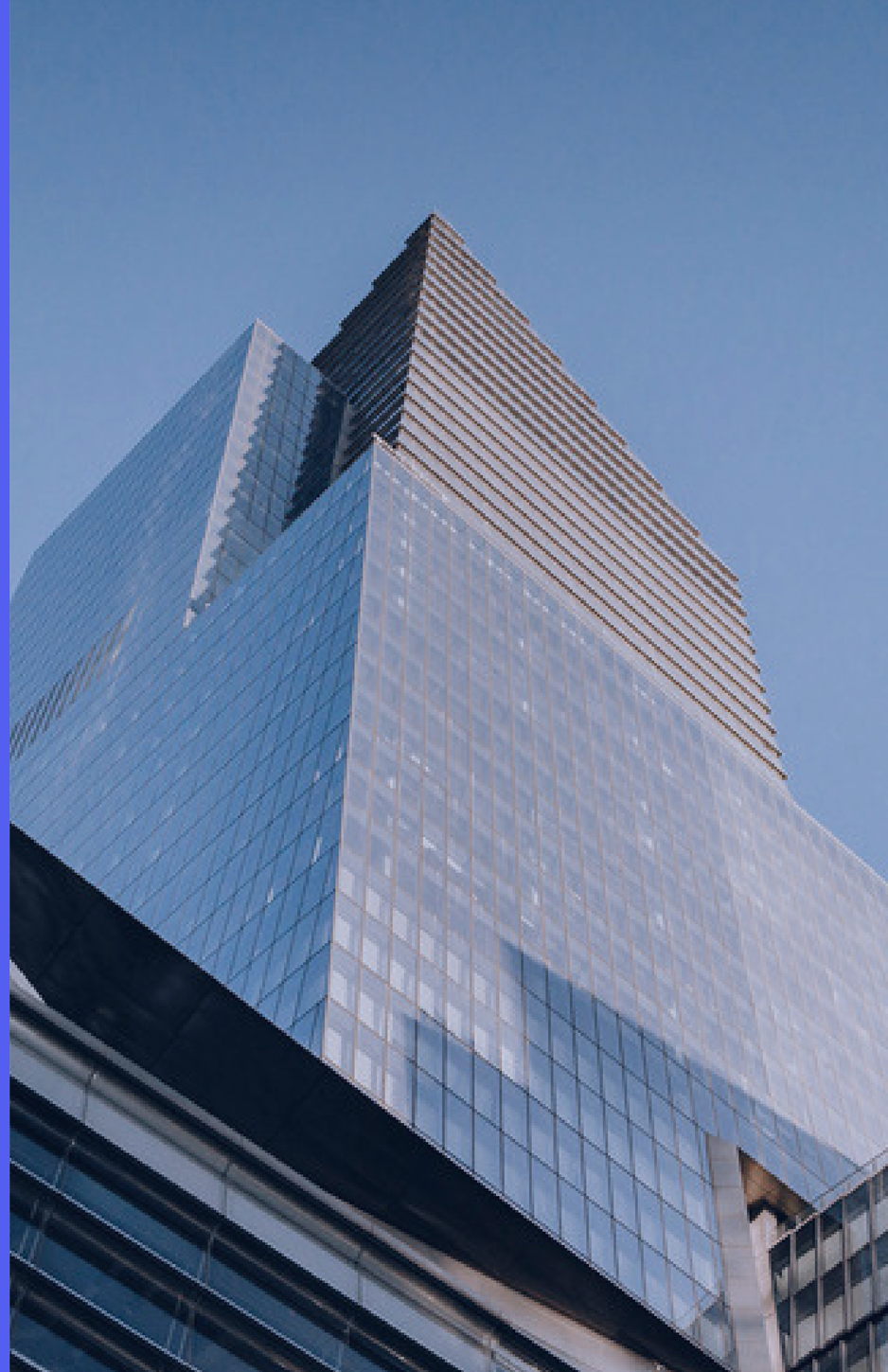
# STATEMENT 10:

# REVOLUTIONIZING WEALTH MANAGEMENT:  INSIGHTS AND PREDICTIONS FOR MUTUAL FUNDSINVESTING

**PREPARED BY:**

RUBIX CUBE



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# WHY WE CHOOSE THIS PROJECT

our project aims to democratize wealth management by providing accessible, data-driven insights and predictive analytics tailored to the needs of middle-class investors, ultimately revolutionizing the way individuals approach their financial planning and investment strategies.

# FEATURES

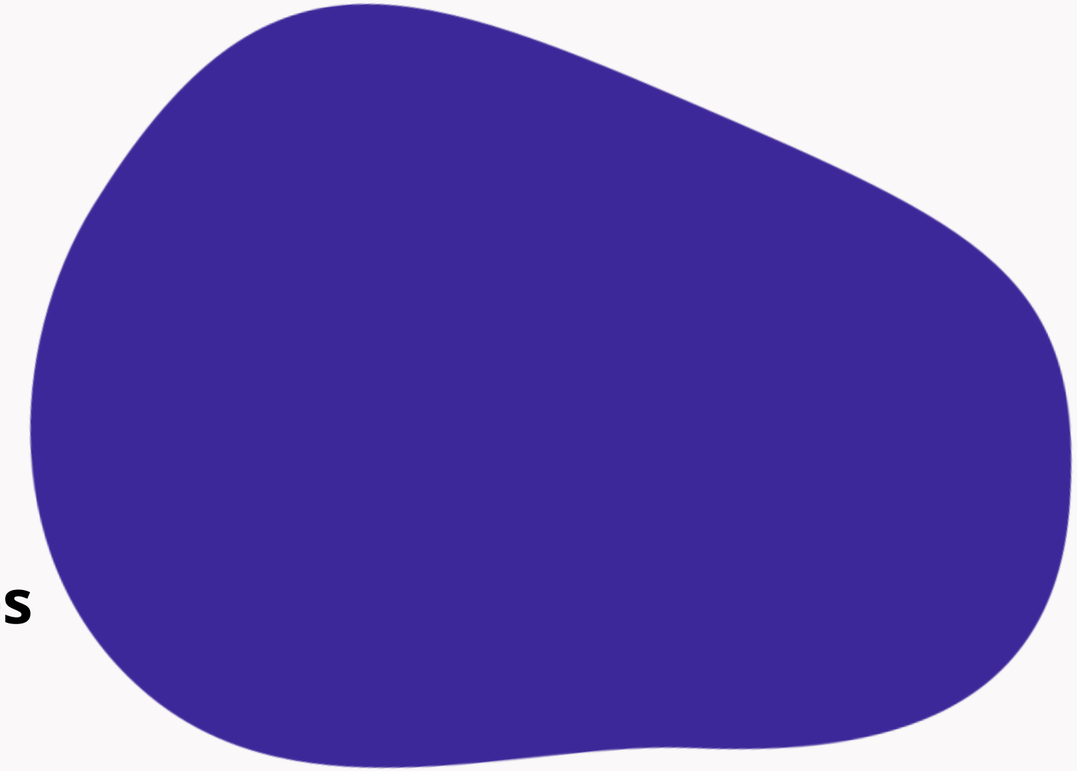
***AMC_NAMES***

***TENURE***

***CATEGORY***

***AMOUNT INVESTED***

# DESCRIPTIVE ANALYSIS



**Data Analysis and Visualization:**

- **perform correlation analysis**
- **Grouping and aggregation**
- **visualize mean for different  attributes**
- **Missing value analysis**

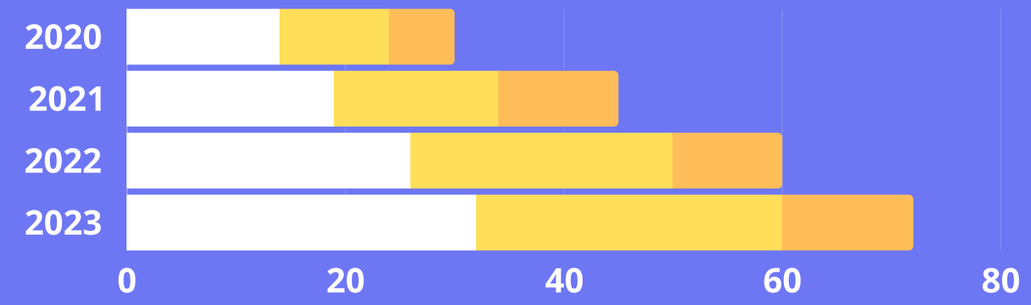
# DATA PREPROCESSSING

- **APPLIED LABEL ENCODING TO CATEGORICAL COLUMN.**
- **FILLED MISSING VALUES WITH THE MEAN IN COLUMNS:**

1. **SORTINO**
2. **ALPHA**
3. **BETA**
4. **SHARPE**

# MACHINE LEARNING MODELING

Built Random Forest Regression models to predict mutual fund returns for different time periods (1yr, 3yr, 5yr).



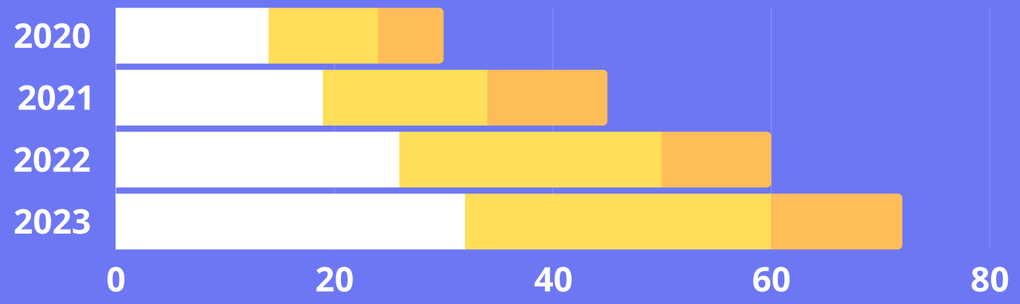
# RECOMMENDATION SYSTEM

Developed a recommendation system using cosine similarity to suggest similar mutual funds based on user input such as category, risk level, and returns.

Implemented interactive widgets for users to input their preferences and receive recommendations for the best mutual funds.

# NEED OF DASHBOARD

**To understand this data and their patterns, then make predictions on the given data to forecast the future performance of specific mutual funds**



# THANK YOU