Task 4 : Investment Duration and Frequency

Objective: Analyze investment durations and monitoring frequencies.

Steps:

1. Duration Distribution: Visualize the distribution of investment durations.

2.Frequency Analysis: Examine investment monitoring frequencies and their impact on investment preferences

SOURCE CODE:

1.Investment by Monitoring Frequency

```
Avg Investment by Monitoring =
DIVIDE(
    [Total Investment by Monitoring],
    [Count of Monitoring Frequency],
    0
)
Count of Monitoring Frequency =
COUNT('Data_set 2'[Invest_Monitor])
```

2. Investment by Duration:

Total Investment by Duration = VAR InvestmentAmount = SUM('Data_set 2'[Mutual_Funds]) +

   SUM('Data_set 2'[Equity_Market]) +

   SUM('Data_set 2'[Debentures]) +

   SUM('Data_set 2'[Government_Bonds]) +

   SUM('Data_set 2'[Fixed_Deposits]) +

   SUM('Data_set 2'[PPF]) +

   SUM('Data_set 2'[Gold])

RETURN

   CALCULATE(InvestmentAmount, ALLEXCEPT('Data_set 2', 'Data_set 2'[Duration]))

3. Investment by Monitoring, Gender, and Savings Objectives:

Total Investment by Monitoring, Gender, and Saving Objective =

SUMX(

   'Data_set 2',

   'Data_set 2'[Mutual_Funds] +

   'Data_set 2'[Equity_Market] +

'Data_set 2'[Debentures] +

'Data_set 2'[Government_Bonds] +

'Data_set 2'[Fixed_Deposits] +

'Data_set 2'[PPF] +

'Data_set 2'[Gold]

)

OUTPUT SCREEN:

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