

Task 5 : Reasons for Investmens

Objective: Analyze and visualize the reasons for investment.

Steps:

1. **Trend Analysis:** Identify common trends in reasons for investment (e.g., Better Returns, Tax Benefits).
2. **2.Visualization:** Create charts showing the most frequently cited reasons for investing.

SOURCE CODE:

1.Capital Appreciation Count:

Total_Capital_Appreciation =

```
CALCULATE(  
    COUNTROWS('Data_set 2'),  
    'Data_set 2'[Reason_Equity] = "Capital Appreciation"  
    || 'Data_set 2'[Reason_Mutual] = "Capital Appreciation"  
    || 'Data_set 2'[Reason_Bonds] = "Capital Appreciation"  
    || 'Data_set 2'[Reason_FD] = "Capital Appreciation"  
)
```

2.Better Returns Count:

Total_Better_Returns =

```
CALCULATE(  
    COUNTROWS('Data_set 2'),  
    'Data_set 2'[Reason_Equity] = "Better Returns"  
    || 'Data_set 2'[Reason_Mutual] = "Better Returns"  
    || 'Data_set 2'[Reason_Bonds] = "Better Returns"  
    || 'Data_set 2'[Reason_FD] = "Better Returns"  
)
```

3.Tax Benefits Count:

Total_Tax_Benefits =

```
CALCULATE(  
    COUNTROWS('Data_set 2'),  
    'Data_set 2'[Reason_Equity] = "Tax Benefits"  
    || 'Data_set 2'[Reason_Mutual] = "Tax Benefits"  
    || 'Data_set 2'[Reason_Bonds] = "Tax Benefits"
```

```

    || 'Data_set 2'[Reason_FD] = "Tax Benefits"

)

```

4. Comprehensive Investment Reasons Breakdown:

```
Investment_Reason_Counts =
```

```
VAR ReasonsTable =
```

```

DATATABLE(

    "Investment Reason", STRING,

    {

        {"Assured Returns"}, {"Better Returns"}, {"Capital Appreciation"}, {"Dividend"},

        {"Fixed Returns"}, {"Fund Diversification"}, {"High Interest Rates"}, {"Liquidity"},

        {"Risk Free"}, {"Safe Investment"}, {"Tax Benefits"}, {"Tax Incentives"}

    }

)

```

```
RETURN
```

```
ADDCOLUMNS(
```

```
    ReasonsTable,
```

```
    "Total Count",
```

```
    VAR Reason = [Investment Reason]
```

```
    RETURN
```

```
    CALCULATE(
```

```
        COUNTROWS('Data_set 2'),
```

```
        'Data_set 2'[Reason_Equity] = Reason ||
```

```
        'Data_set 2'[Reason_Mutual] = Reason ||
```

```
        'Data_set 2'[Reason_Bonds] = Reason ||
```

```
        'Data_set 2'[Reason_FD] = Reason
```

```
    )
```

```
)
```

OUTPUT SCREEN:

Task 5 : Reason for Investment

Capital Appreciation

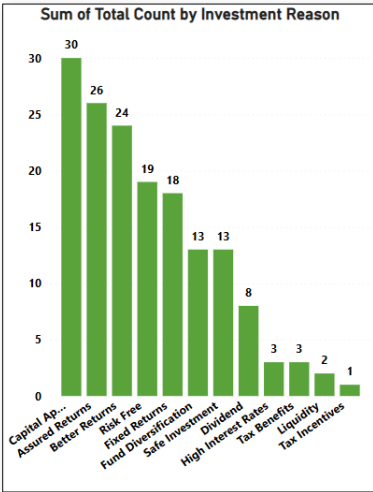
30

Better_Returns

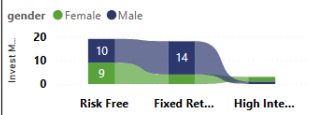
24

Tax_Benefits

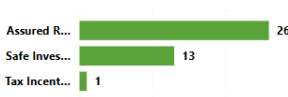
3



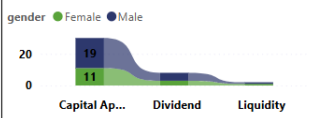
Invest Monitor & Duration by Reason_FD and gender



Invest_Monitor & Duration by Reason_Bonds



Invest_Monitor and Duration by Reason_Equity and gender



Duration

- ☐ 1-3 years
- ☐ 3-5 years
- ☐ Less than 1 year
- ☐ More than 5 ye...

Invest_Monitor

- ☐ Daily
- ☐ Monthly
- ☐ Weekly

Invest Monitor & Duration Reason_Mutual

