Task 1 : Data Exploration and Summary

27.80
Avg age

37
Investment Avenue

3
No Investment Avenue

Count of gender by What are your savings objectives?

Savings Objective	Count
Retirement Plan	24
Health Care	13
Education	3

Legend: ● Total Debentur... ● Total Equity ... ● Total Fixed ... ● Total Gold I... ● Total Gover... ● Total Mutu... ● Total PPF I...

Donut chart:
- 20.54%
- 12.41%
- 12.77%
- 21.34%
- 16.61%
- 9.11%
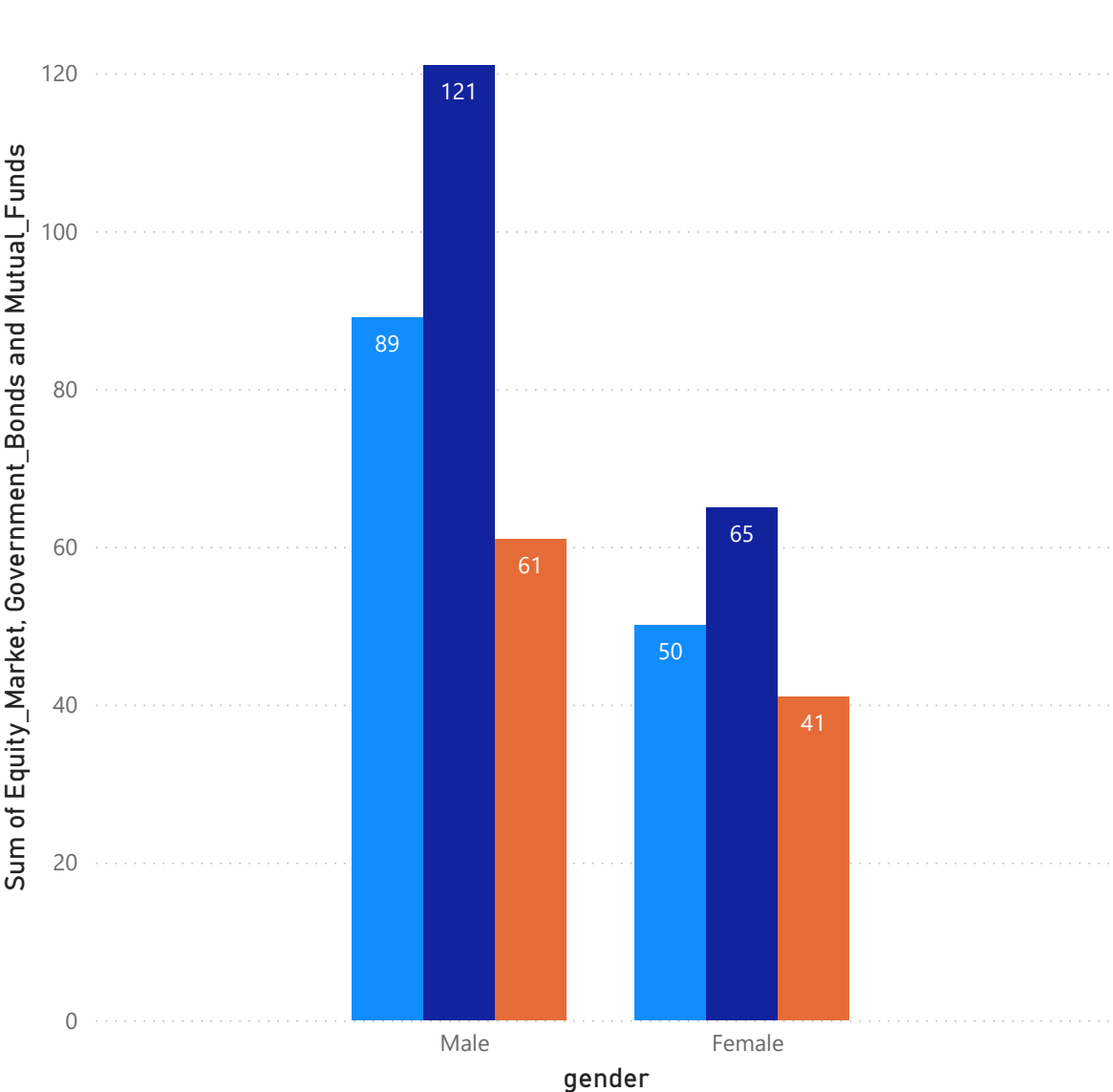- 7.23%
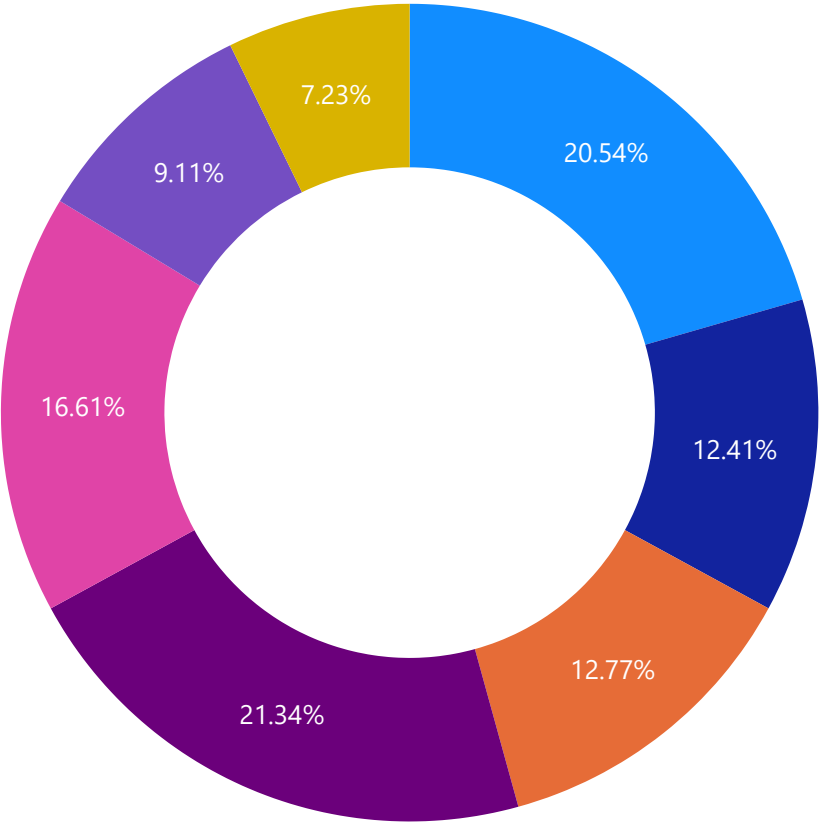
Task 2: Gender-Based Analysis

Count of Equity_Market, Government_Bonds and Mutual_Funds by gender

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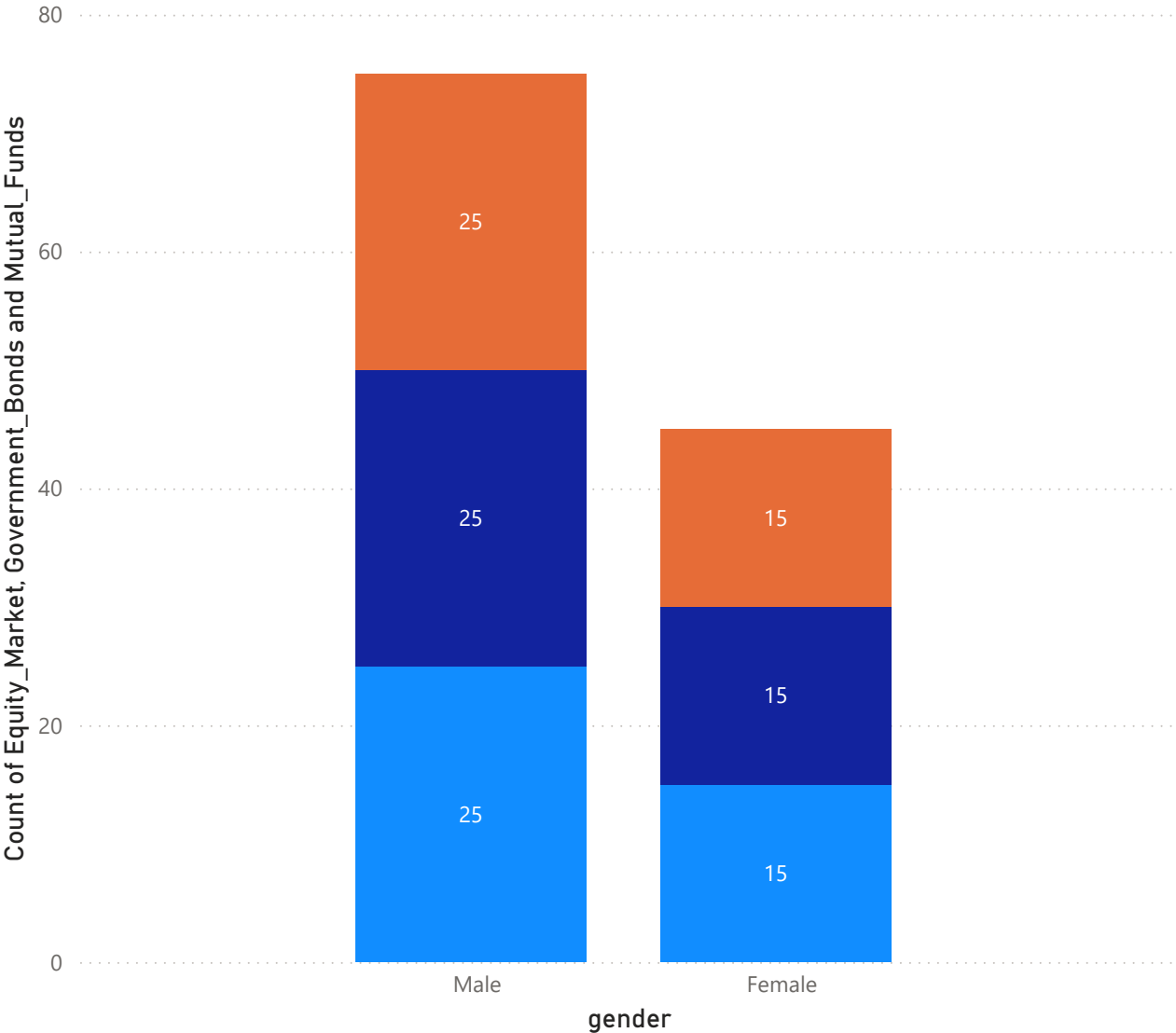
Sum of Equity_Market, Government_Bonds and Mutual_Funds by gender

● Sum of Equity_Market ● Government_Bonds ● Mutual_Funds

Key Insights:

15

Count of Age - Female

25

Count of Age - Male

Male

89
Sum of Equity_Market

121
Sum of Government_Bonds

61
Sum of Mutual_Funds

Female

50
Sum of Equity_Market

65
Sum of Government_Bonds

41
Sum of Mutual_Funds

Task 3: Objective Analysis

- 1
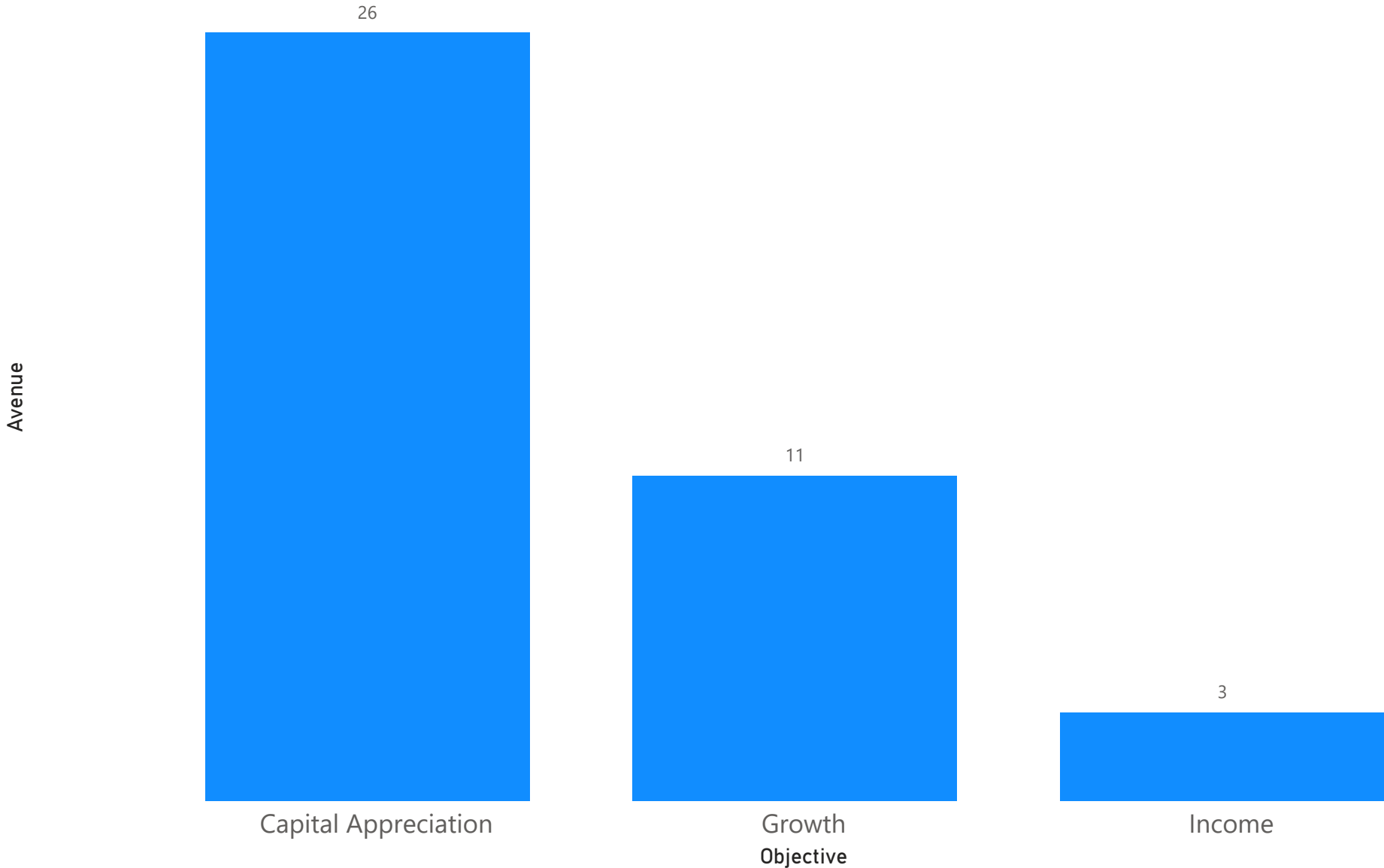
Pearson Correlation

Avenue

Equity	Mutual Fund
Fixed Deposits	Public Provident Fund

Avenue by Objective

Avenue

Objective	Value
Capital Appreciation	26
Growth	11
Income	3

Task 4 : Investment Duration and Frequency

10	**9**	**18**	**3**
Equity	Fixed Deposits	Mutual Fund	Public Provident Fund

Avenue by Duration

Duration	Avenue
3-5 years	19
1-3 years	18
Less than 1 year	2
More than 5 years	1

Avenue by Invest_Monitor

Invest_Monitor	Avenue
Monthly	29
Weekly	7
Daily	4

Avenue

- Equity
- Fixed Deposits
- Mutual Fund
- Public Provident Fund
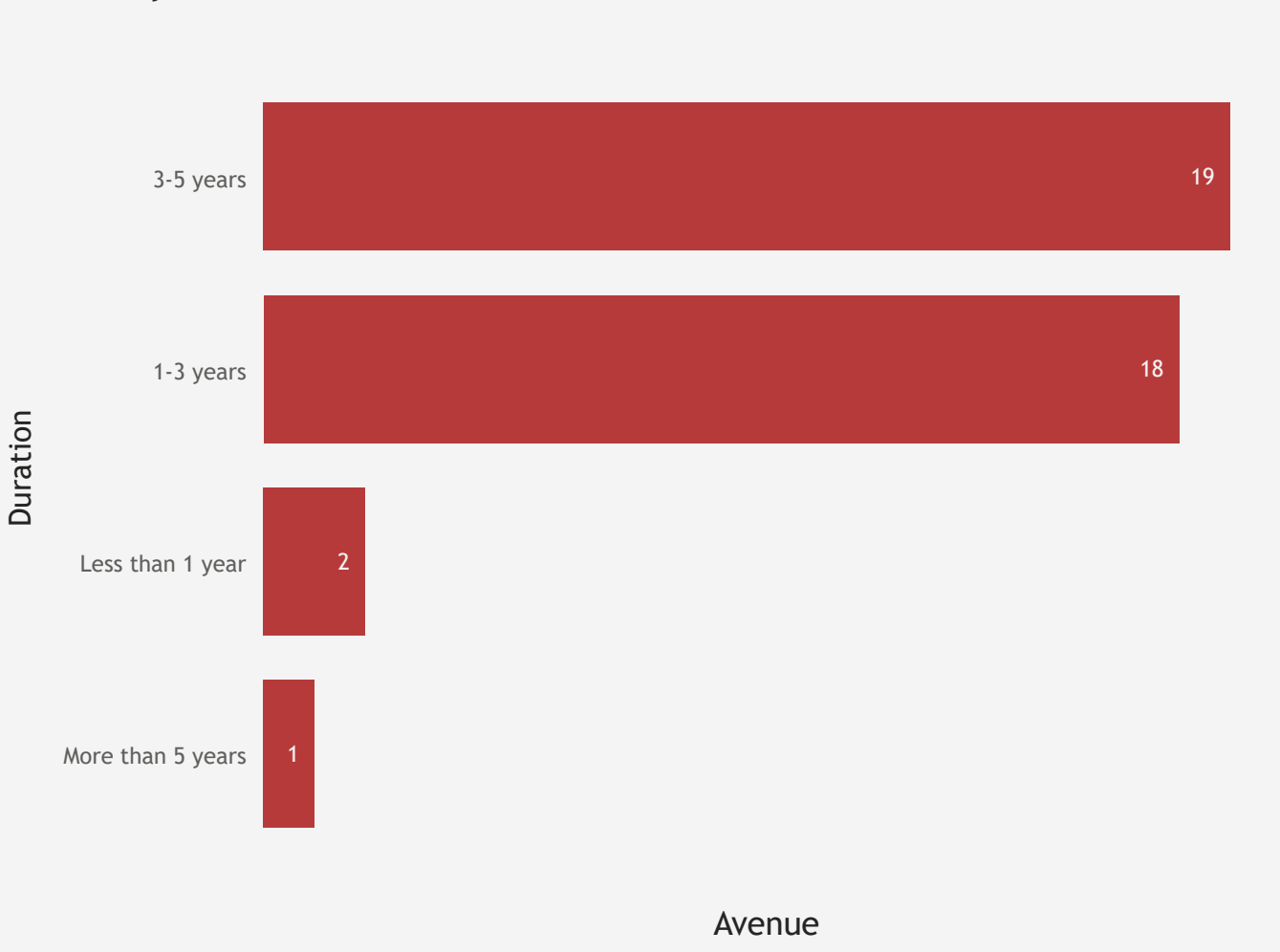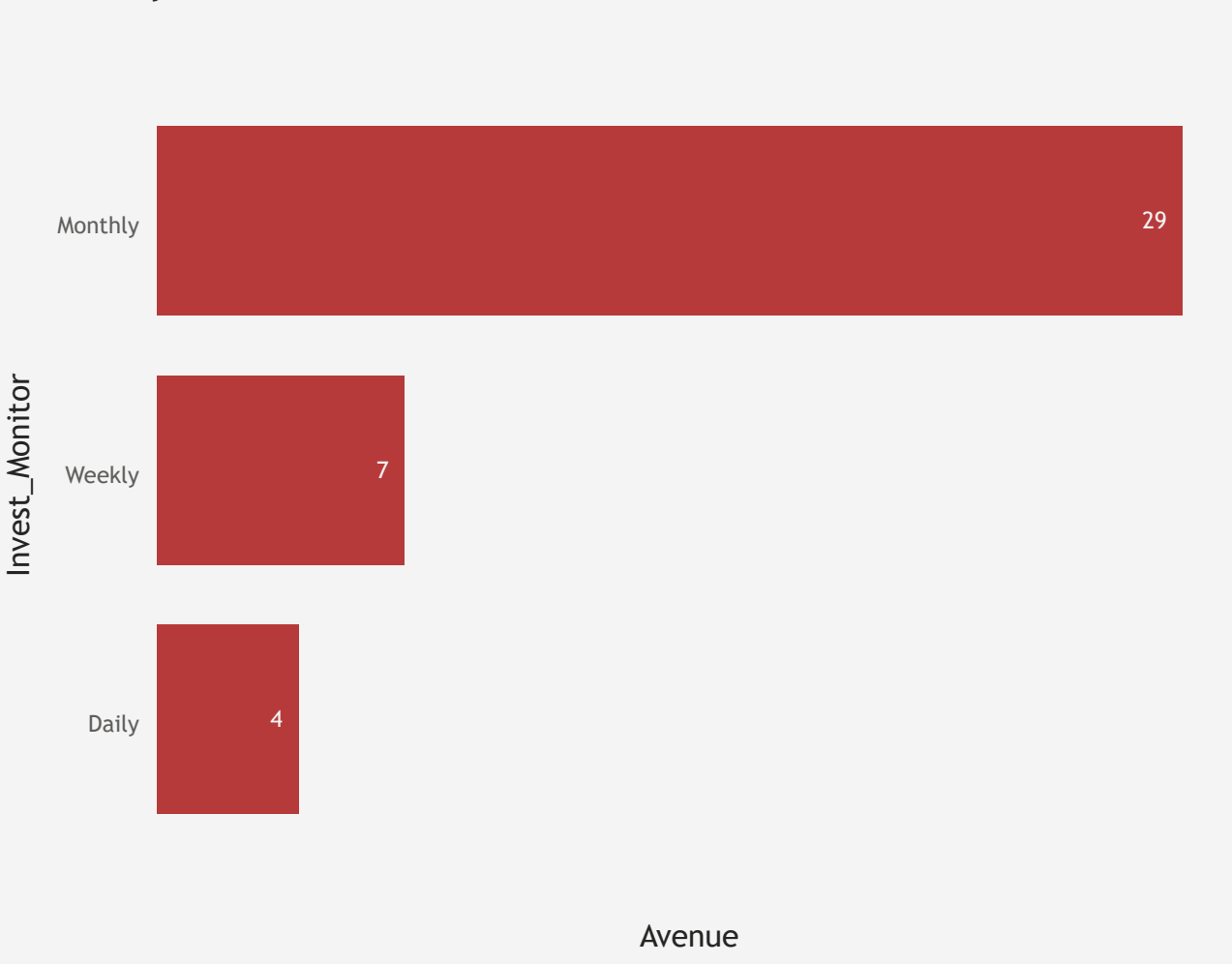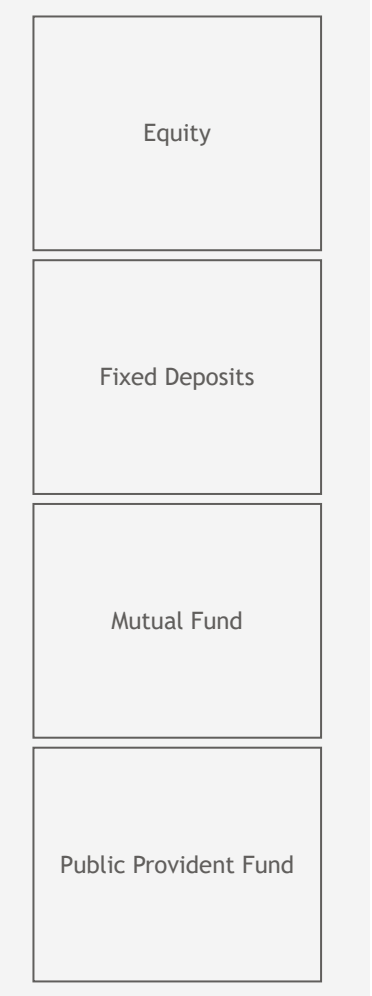
Task 5: Reasons for Investment

Better Returns	Fund Diversification	Tax Benefits

Reason_Mutual by Duration

19	3-5 years
18	1-3 years
2	Less than 1 year
1	More than 5 years

Duration
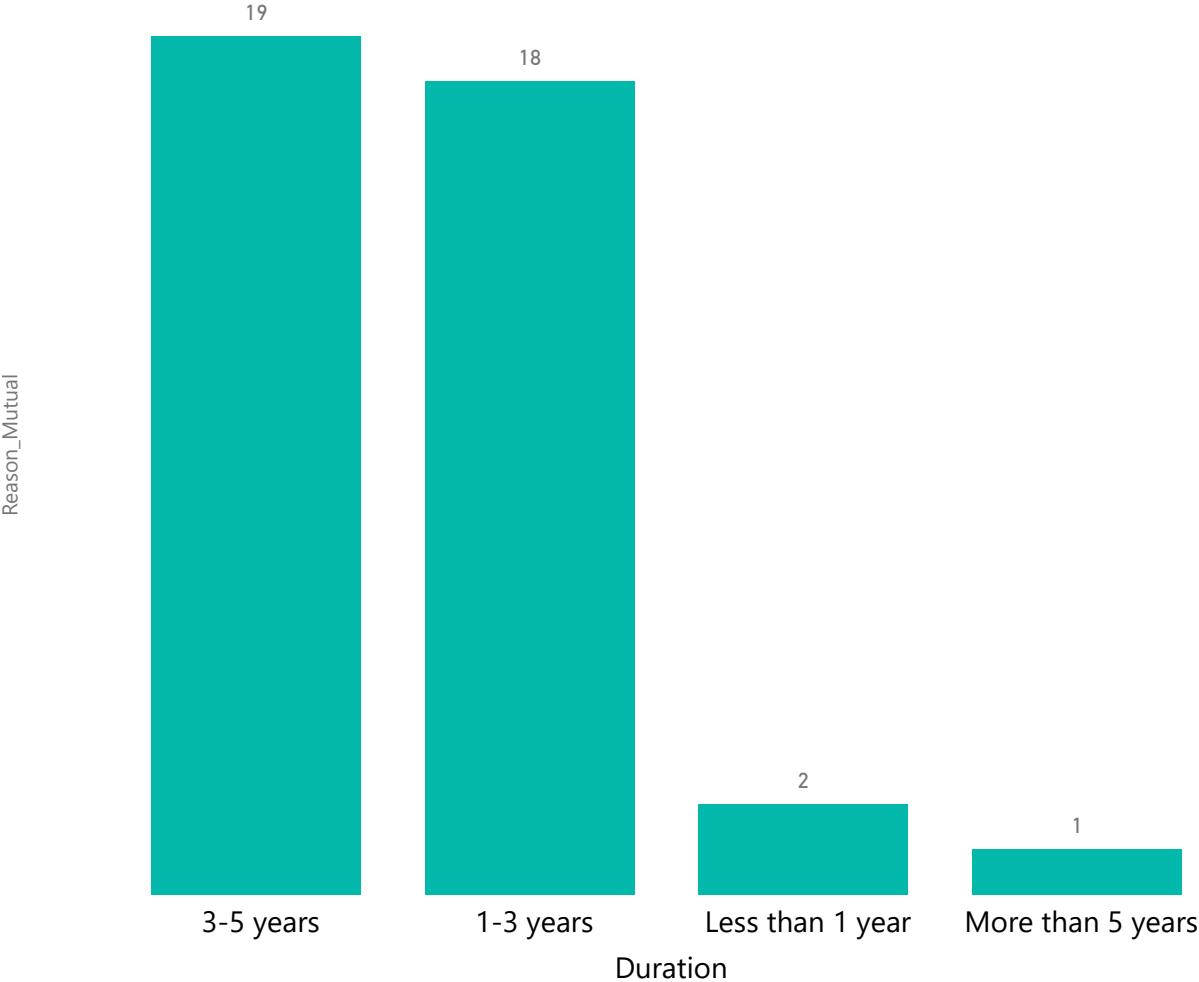
Reason_Mutual by Invest_Monitor

29	Monthly
7	Weekly
4	Daily

Invest_Monitor
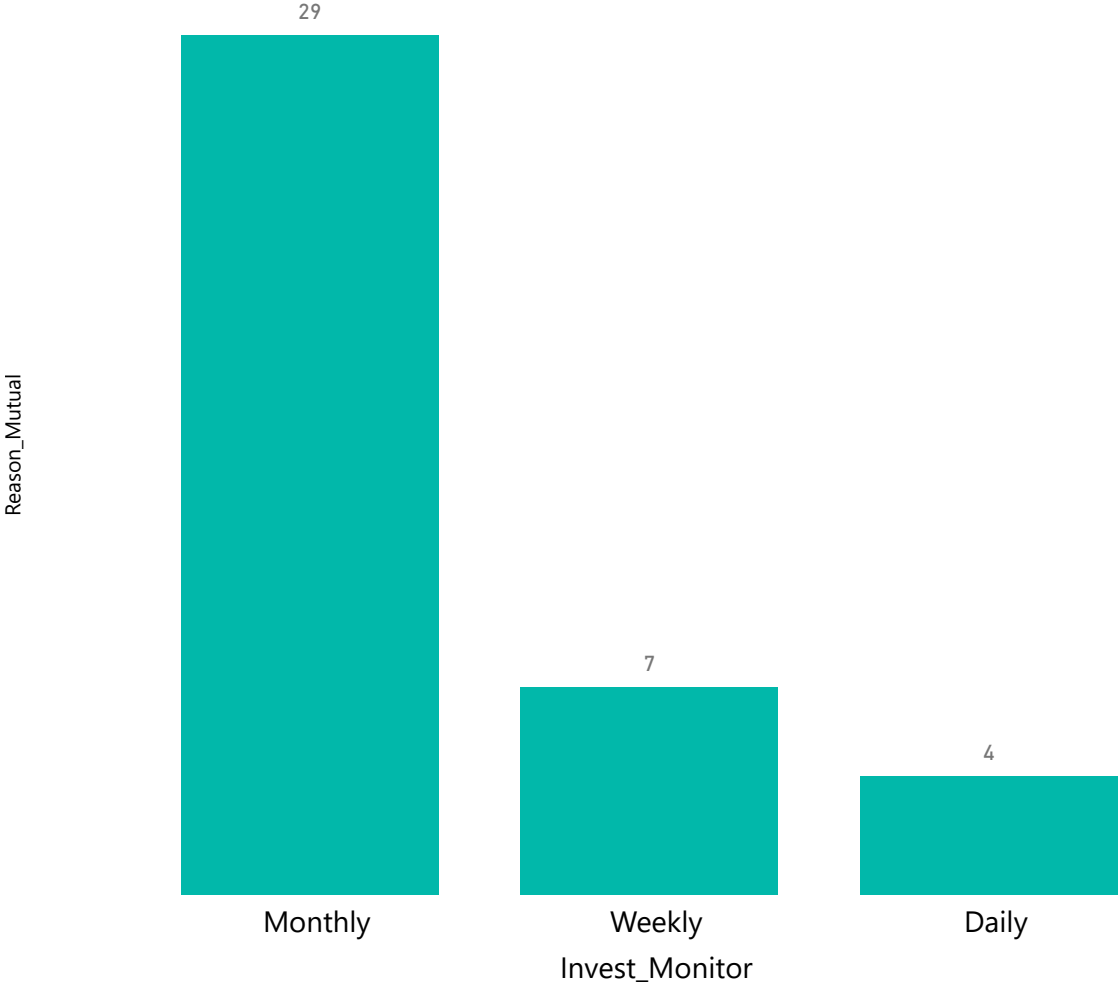
24 Better Returns

13 Fund Diversification

3 Tax Benefits

Task 6: Source of Information

Source

- Financial Consultants
- Internet
- Newspapers and Magazines
- Television

Avenue by Source

Source	Avenue
Financial Consultants	16
Newspapers and Magazines	14
Television	6
Internet	4

Source by Avenue

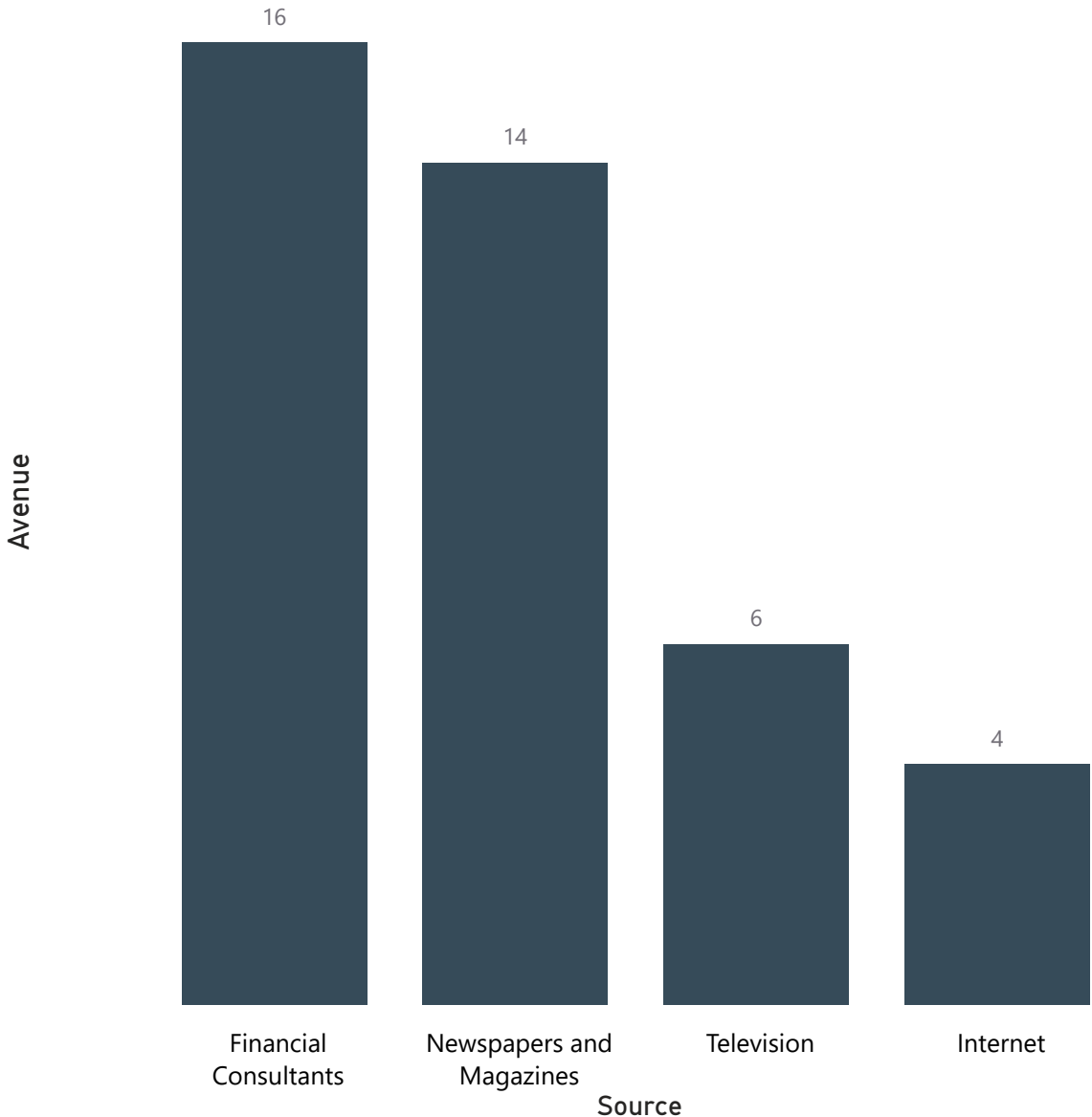| Avenue	Source
Mutual Fund	18
Equity	10
Fixed Deposits	9
Public Provident Fund	3
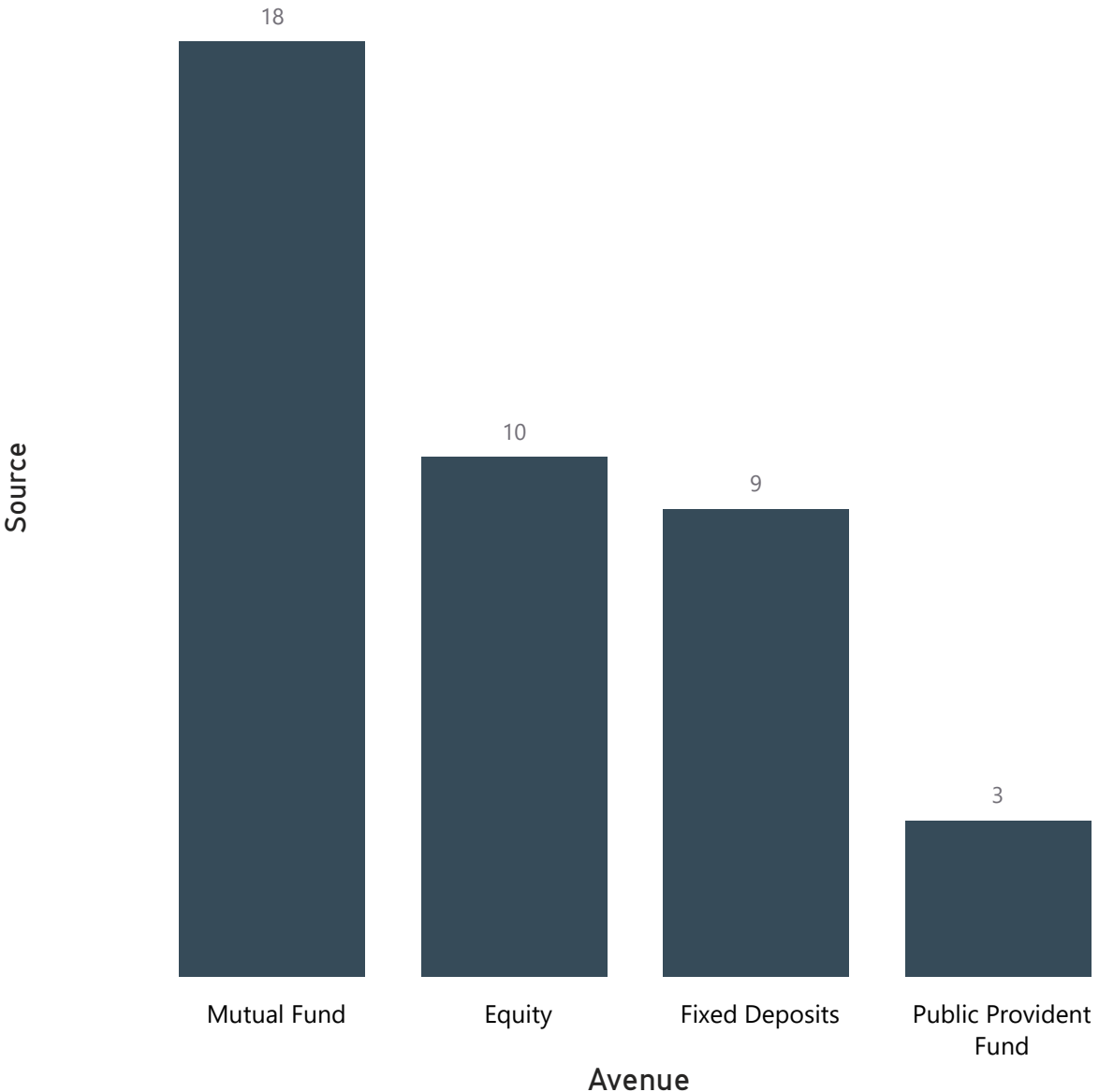
Task 7: Combine Insights into a Dashboard

Avenue

- Equity
- Fixed Deposits
- Mutual Fund
- Public Provident Fund

27.80
Avg Age

25
Male

15
Female

Individual by Investment_Avenues

3 (7.5%)
37 (92.5%)

Investment_Ave...
- Yes
- No

Individual by What are your savings objectives?

3 (7.5%)
13 (32.5%)
24 (60%)

What are your savi...
- Retirement Plan
- Health Care
- Education

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

- Sum of Equity_Market
- Sum of Government_Bonds
- Sum of Mutual_Fun...

Male: 89, 121, 61
Female: 50, 65, 41

gender

Avenue by Objective

Objective
- Capital A...
- Growth
- Income

0   20

Avenue by Source

- Financial ...
- Newspap...
- Television
- Internet

0   10   20

Avenue by Duration

3-5 years, 1-3 years, Less than 1 year, More than 5 years

Avenue by Invest_Monitor

Monthly, Weekly, Daily

Invest_Monitor

Reason_Mutual

- Better Returns
- Fund Diversification
- Tax Benefits