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Cognifyz

Where Data Meets Intelligence

Comprehensive Investment Analysis Dashboard

DATA VISUALIZATION

(USING MICROSOFT EXCEL)

Task 1: Gender Distribution Analysis in Excel

Objective: Analyze the gender distribution within the dataset using Excel.

Steps:
1.Open the dataset in Excel.
Use Excel functions such as COUNTIF or pivot tables to calculate the count or percentage of each gender category.

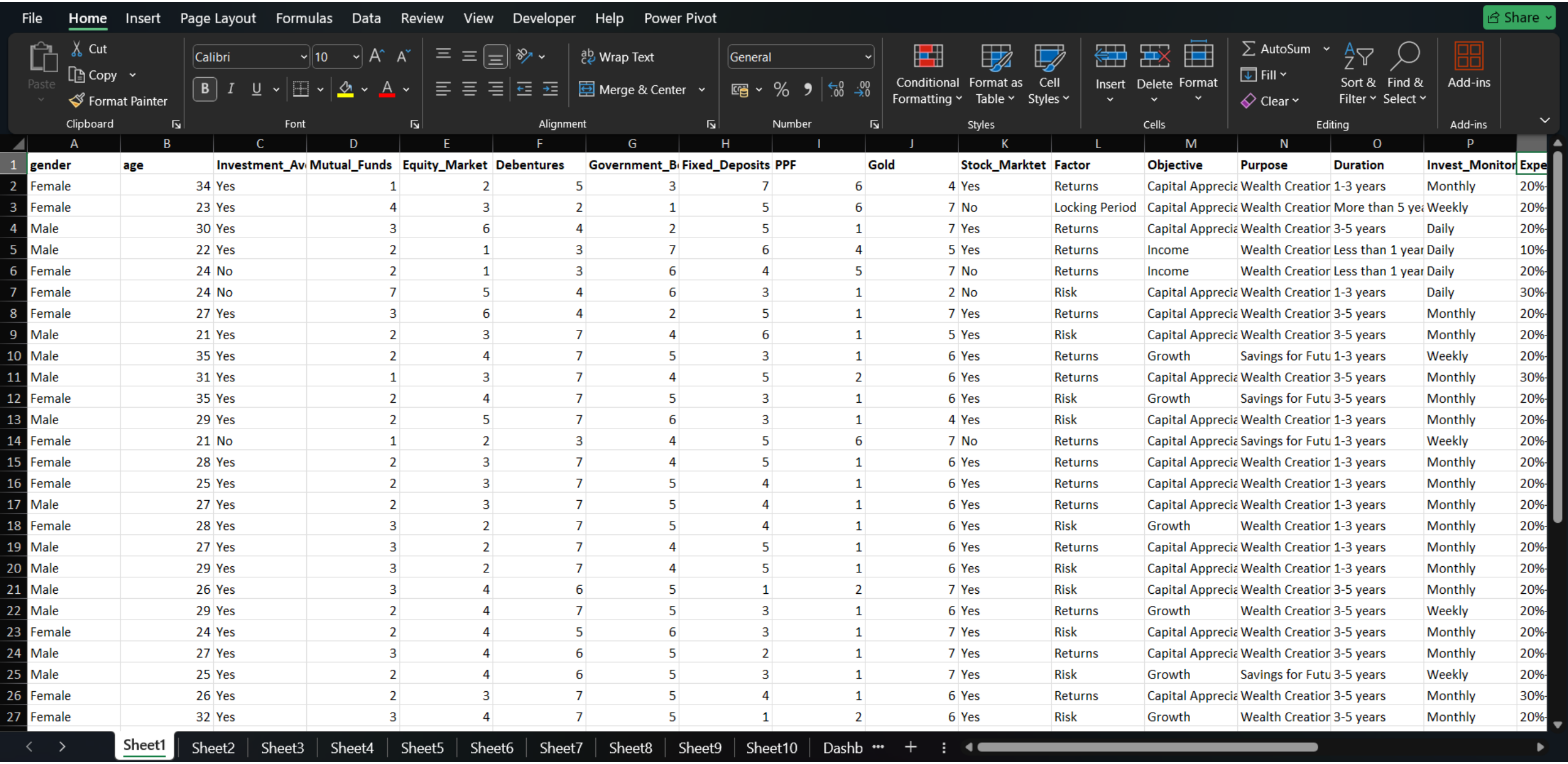
2.Create a pie chart using the calculated gender distribution data.

3.Label the pie chart segments with the corresponding gender categories.

4.Customize the appearance of the chart, including colors and labels.

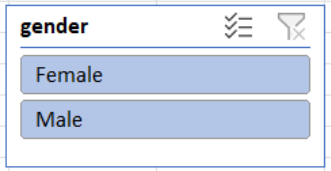
5.Add a title and any necessary labels or legends to the chart.

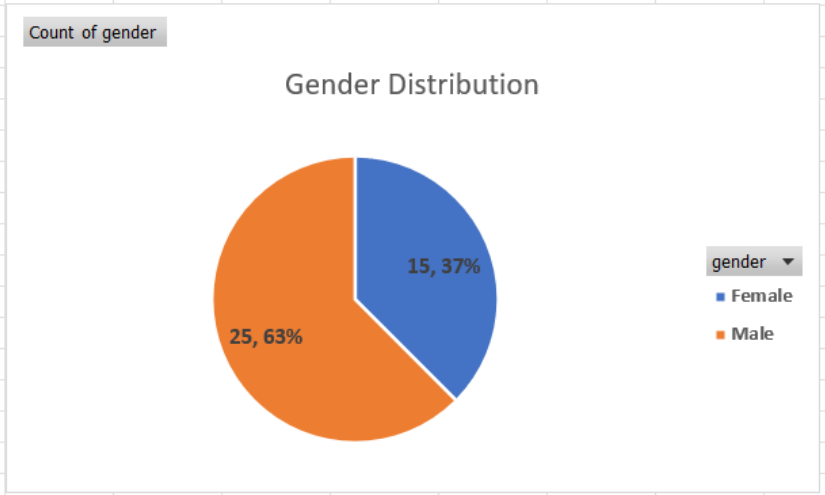
6.Save the Excel file with the pie chart for presentation or inclusion in a report.



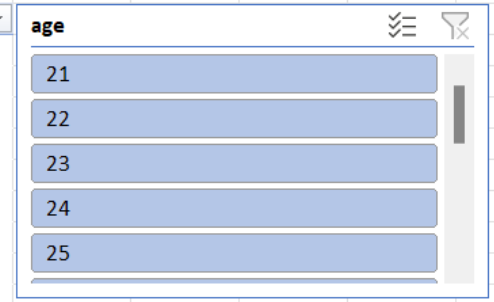
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	
1	gender	age	Investment_Av	Mutual_Funds	Equity_Market	Debentures	Government_B	Fixed_Deposits	PPF	Gold	Stock_Marktet	Factor	Objective	Purpose	Duration	Invest_Monitor	Expe
2	Female	34	Yes	1	2	5	3	7	6	4	Yes	Returns	Capital Appreci	Wealth Creatior	1-3 years	Monthly	20%
3	Female	23	Yes	4	3	2	1	5	6	7	No	Locking Period	Capital Appreci	Wealth Creatior	More than 5 ye	Weekly	20%
4	Male	30	Yes	3	6	4	2	5	1	7	Yes	Returns	Capital Appreci	Wealth Creatior	3-5 years	Daily	20%
5	Male	22	Yes	2	1	3	7	6	4	5	Yes	Returns	Income	Wealth Creatior	Less than 1 year	Daily	10%
6	Female	24	No	2	1	3	6	4	5	7	No	Returns	Income	Wealth Creatior	Less than 1 year	Daily	20%
7	Female	24	No	7	5	4	6	3	1	2	No	Risk	Capital Appreci	Wealth Creatior	1-3 years	Daily	30%
8	Female	27	Yes	3	6	4	2	5	1	7	Yes	Returns	Capital Appreci	Wealth Creatior	3-5 years	Monthly	20%
9	Male	21	Yes	2	3	7	4	6	1	5	Yes	Risk	Capital Appreci	Wealth Creatior	3-5 years	Monthly	20%
10	Male	35	Yes	2	4	7	5	3	1	6	Yes	Returns	Growth	Savings for Futu	1-3 years	Weekly	20%
11	Male	31	Yes	1	3	7	4	5	2	6	Yes	Returns	Capital Appreci	Wealth Creatior	3-5 years	Monthly	30%
12	Female	35	Yes	2	4	7	5	3	1	6	Yes	Risk	Growth	Savings for Futu	3-5 years	Monthly	20%
13	Male	29	Yes	2	5	7	6	3	1	4	Yes	Risk	Capital Appreci	Wealth Creatior	1-3 years	Monthly	20%
14	Female	21	No	1	2	3	4	5	6	7	No	Returns	Capital Appreci	Savings for Futu	1-3 years	Weekly	20%
15	Female	28	Yes	2	3	7	4	5	1	6	Yes	Returns	Capital Appreci	Wealth Creatior	1-3 years	Monthly	20%
16	Female	25	Yes	2	3	7	5	4	1	6	Yes	Returns	Capital Appreci	Wealth Creatior	1-3 years	Monthly	20%
17	Male	27	Yes	2	3	7	5	4	1	6	Yes	Returns	Capital Appreci	Wealth Creatior	1-3 years	Monthly	20%
18	Female	28	Yes	3	2	7	5	4	1	6	Yes	Risk	Growth	Wealth Creatior	1-3 years	Monthly	20%
19	Male	27	Yes	3	2	7	4	5	1	6	Yes	Returns	Capital Appreci	Wealth Creatior	1-3 years	Monthly	20%
20	Male	29	Yes	3	2	7	4	5	1	6	Yes	Risk	Capital Appreci	Wealth Creatior	1-3 years	Monthly	20%
21	Male	26	Yes	3	4	6	5	1	2	7	Yes	Risk	Capital Appreci	Wealth Creatior	3-5 years	Monthly	20%
22	Male	29	Yes	2	4	7	5	3	1	6	Yes	Returns	Growth	Wealth Creatior	3-5 years	Weekly	20%
23	Female	24	Yes	2	4	5	6	3	1	7	Yes	Risk	Capital Appreci	Wealth Creatior	3-5 years	Monthly	20%
24	Male	27	Yes	3	4	6	5	2	1	7	Yes	Returns	Capital Appreci	Wealth Creatior	3-5 years	Monthly	20%
25	Male	25	Yes	2	4	6	5	3	1	7	Yes	Risk	Growth	Savings for Futu	3-5 years	Weekly	20%
26	Female	26	Yes	2	3	7	5	4	1	6	Yes	Returns	Capital Appreci	Wealth Creatior	3-5 years	Monthly	30%
27	Female	32	Yes	3	4	7	5	1	2	6	Yes	Risk	Growth	Wealth Creatior	3-5 years	Monthly	20%

Row Labels	Count of gender
Female	15
Male	25
Grand Total	**40**





Row Labels
21
22
23
24
25
26
27
28
29
30
31
32
34
35
Grand Total



Task 2: Investment Preferences Analysis in Excel

Objective: Analyze participants' investment preferences, including distribution across different avenues and reasons for investment choices using Excel.

Steps : Use pivot tables or Excel functions to summarize the data on investment avenues chosen by participants.

1.Create a bar chart to illustrate the distribution of participants across different investment avenues.

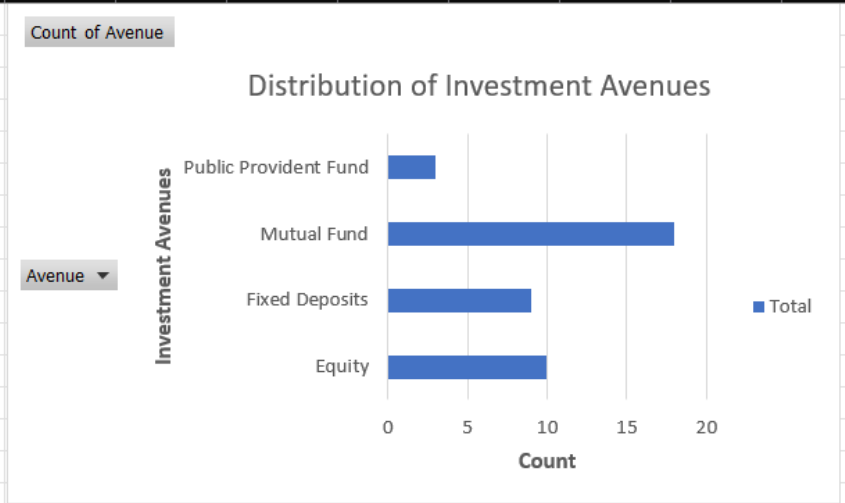
2.Use pivot tables or Excel functions to summarize the reasons provided by participants for choosing specific investment avenues.

3.Create a stacked or grouped bar chart to visualize the reasons for investment choices within each avenue.

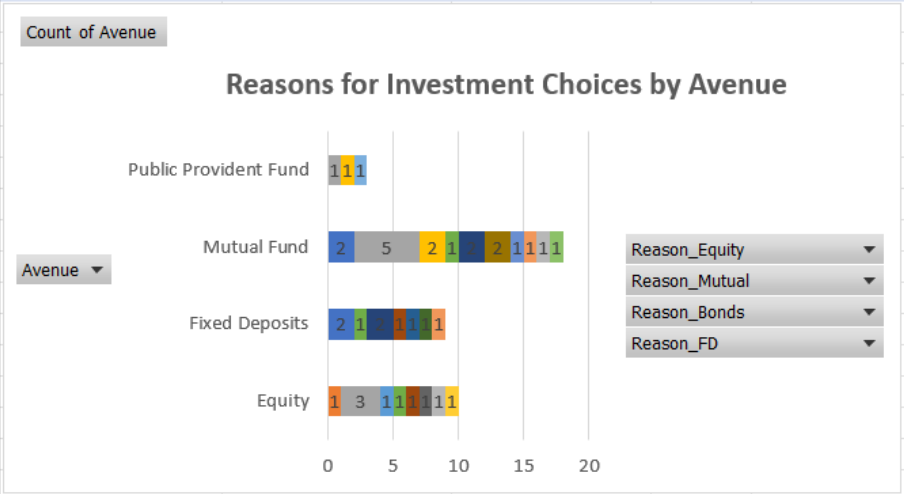
4.Label the axes, add a title, and any necessary legends or annotations to the charts.

5.Customize the appearance of the charts for clarity and aesthetics. Save the Excel file with the visualizations for presentation or inclusion in a report.

Row Labels	Count of Avenue
Equity	10
Fixed Deposits	9
Mutual Fund	18
Public Provident Fund	3
Grand Total	**40**



Count of Avenue	Column Labels												
	Capital Appreciation												
	Better Returns								Better Returns Total	Fund Diversification			
	Assured Returns			Assured Returns Total	Safe Investment		Safe Investment Total			Assured Returns		Assured Returns Total	Safe Investment	Safe I
Row Labels	Fixed Returns	High Interest Rates	Risk Free		Fixed Returns	Risk Free				Fixed Returns	Risk Free		Fixed Returns	
Equity		1	3	4		1	1	5		1		1	1	
Fixed Deposits	2			2				2		1	2	3	1	
Mutual Fund	2		5	7	2		2	9		1	2	3		
Public Provident Fund			1	1	1		1	2						
Grand Total	**4**	**1**	**9**	**14**	**3**	**1**	**4**	**18**		**3**	**4**	**7**	**2**	



Task 3: Objective and Source Analysis in Excel

Objective: Analyze participants' savings objectives and common information sources using Excel.

Steps : Use pivot tables or Excel functions to summarize the data on savings objectives stated by participants.

1.Create a donut chart to represent the distribution of savings objectives among participants.

2.Use pivot tables or Excel functions to summarize the data on common information sources used by participants.

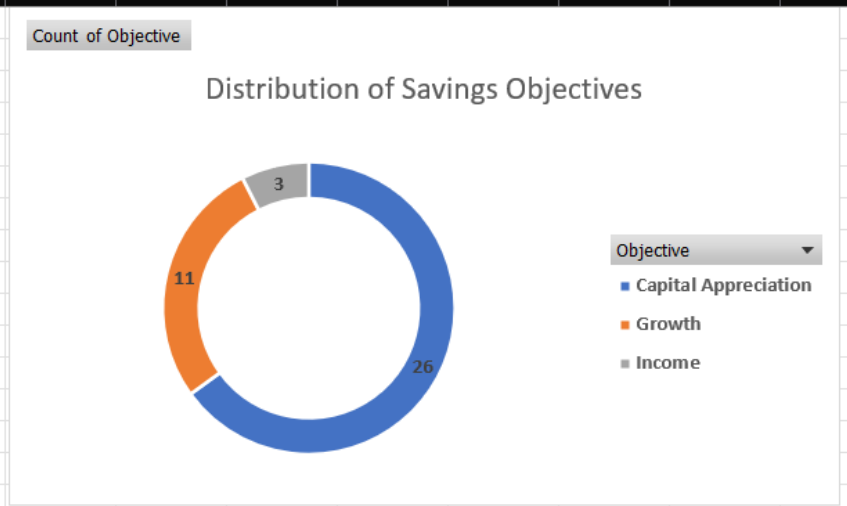
3.Create a horizontal bar chart to display the frequency of each information source.

4.Label the charts appropriately and add any necessary legends or annotations.

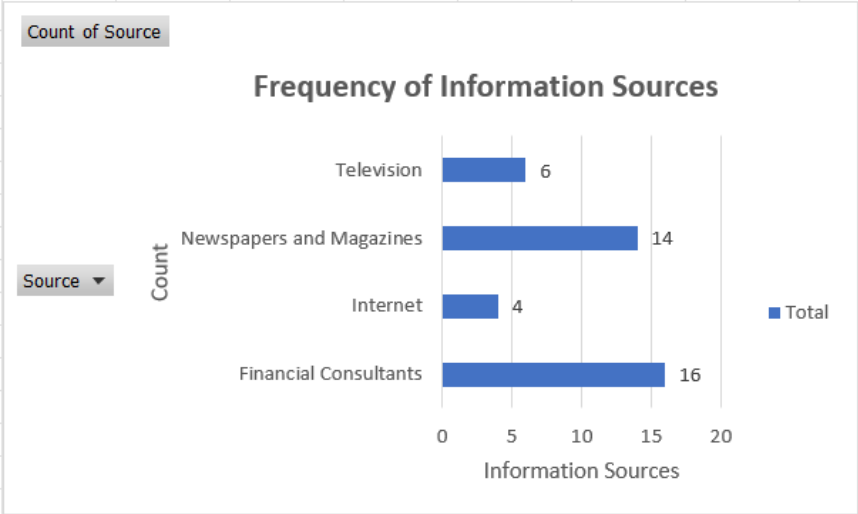
5.Customize the appearance of the charts for clarity and aesthetics.

6.Save the Excel file with the visualizations for presentation or inclusion in a report.

Row Labels	Count of Objective
Capital Appreciation	26
Growth	11
Income	3
Grand Total	**40**



Row Labels	Count of Source
Financial Consultants	16
Internet	4
Newspapers and Magazines	14
Television	6
Grand Total	**40**



Task 4: Duration and Expectations Analysis in Excel

Objective: Analyze investment durations mentioned by participants and their expectations from investments using Excel.

Steps:

Use pivot tables or Excel functions to summarize the data on investment durations mentioned by participants.

1.Construct a histogram to visualize the distribution of investment durations.

2.Use pivot tables or Excel functions to summarize the data on participants' expectations from their investments.

3.Create a radar chart to illustrate the different expectations participants have.

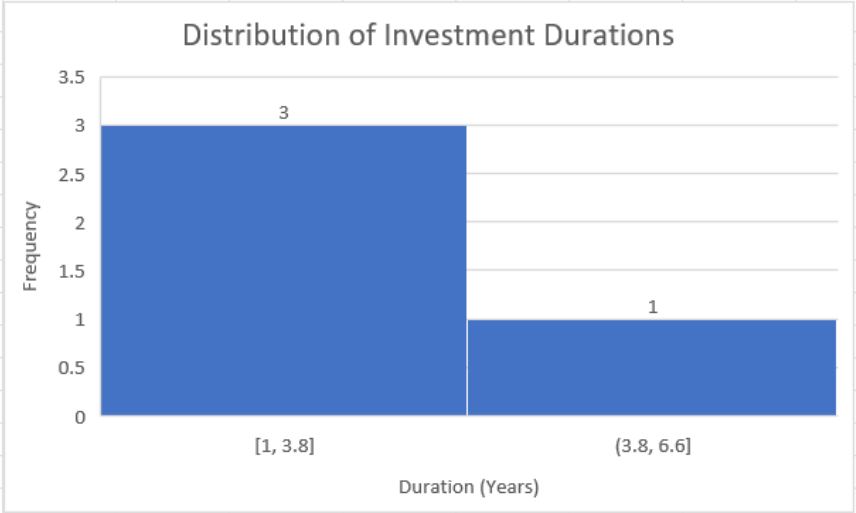
4.Label the axes, add a title, and any necessary legends or annotations to the charts.

5.Customize the appearance of the charts for clarity and aesthetics.

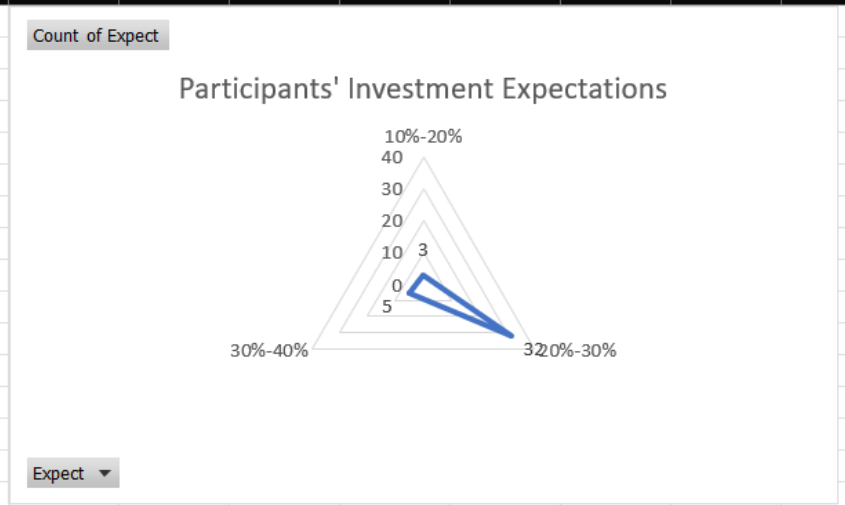
6.Save the Excel file with the visualizations for presentation or inclusion in a report.

Investment Duration	Coded Duration
less than 1 year	1
1-3 years	2
3-5 years	3
more than 5 years	4

Row Labels	Count of Duration
1-3 years	18
3-5 years	19
Less than 1 year	2
More than 5 years	1
Grand Total	**40**



Row Labels	Count of Expect
10%-20%	3
20%-30%	32
30%-40%	5
Grand Total	**40**



Task 5: Correlation Analysis in Excel

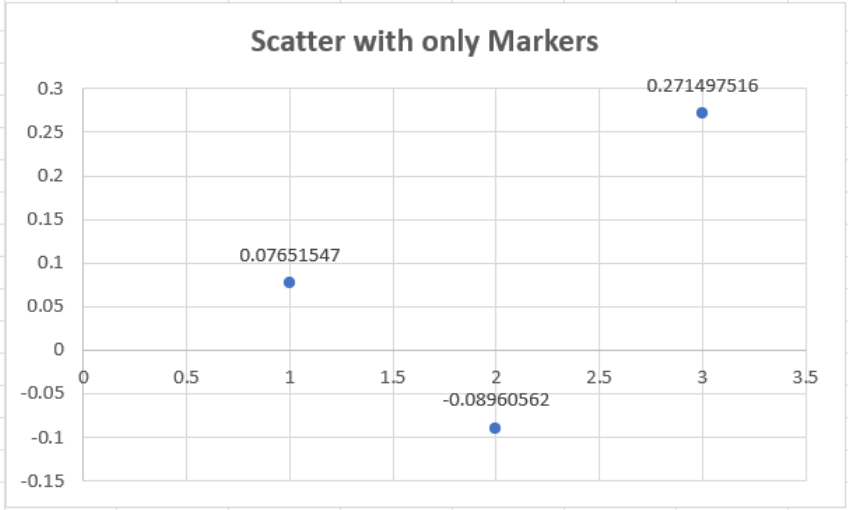
Objective: Analyze potential correlations between factors like age, investment duration, and expected returns using Excel.
Steps:

Use Excel functions or data analysis tools to calculate correlation coefficients between relevant variables.

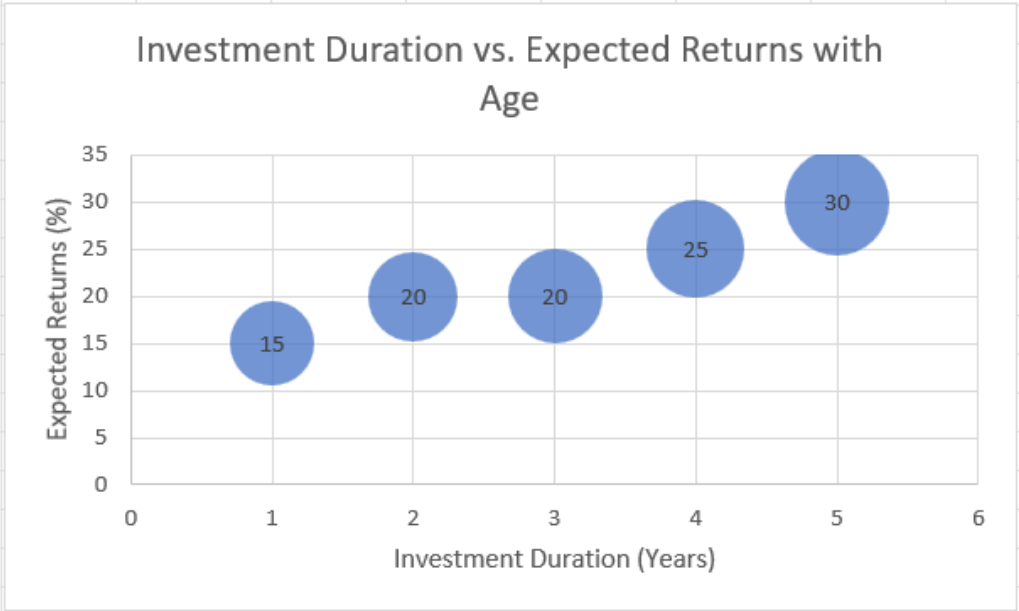
1.Create a scatter plot matrix to visualize potential correlations between age, investment duration, and expected returns.
2.Adjust the size and scale of the scatter plots as needed for clarity.
3.Create a bubble chart to explore the relationship between investment duration and participants' expectations.
4.Label the axes, add a title, and any necessary legends or annotations to the charts.
5.Customize the appearance of the charts for clarity and aesthetics.

6.Save the Excel file with the visualizations for presentation or inclusion in a report.

	A	B	C
1	Age and Duration	Age and Returns	Duration and Returns
2	0.07651547	-0.08960562	0.271497516



	A	B	C
1	investment Duration	Expected Returns	age
2	2	20	25
3	4	25	30
4	1	15	22
5	5	30	35
6	3	20	28



Task 6: Dashboard Creation in Excel

Objective: Combine selected visualizations into an interactive dashboard using Excel features like slicers and charts linked to the dataset.
Steps:
Select the visualizations deemed most informative and relevant for the dashboard.

1.Create individual charts or graphs for each selected visualization. Arrange the visualizations in a logical and aesthetically pleasing layout within the Excel workbook.
2.Add slicers or filters to enable interactive filtering of the data displayed in the dashboard.
3.Link each visualization to the dataset to ensure that updates to the data are reflected in real-time.
4.Customize the appearance of the dashboard, including titles, labels, and formatting.
5.Test the dashboard functionality to ensure all interactive features work as intended.
6.Save the Excel file as a dashboard for distribution or presentation to stakeholders.

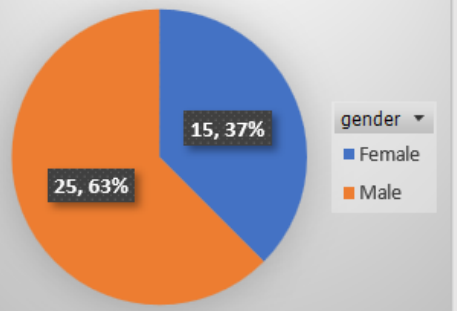
Investment Analysis Dashboard

Gender
Female
Male

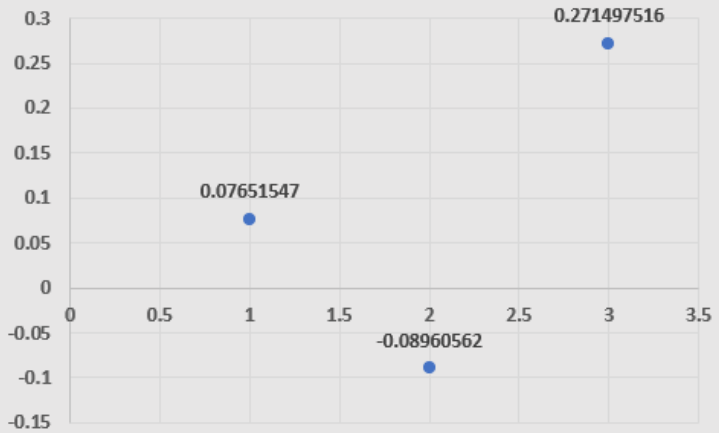
Age
21
22

Count of gender

Gender Distribution

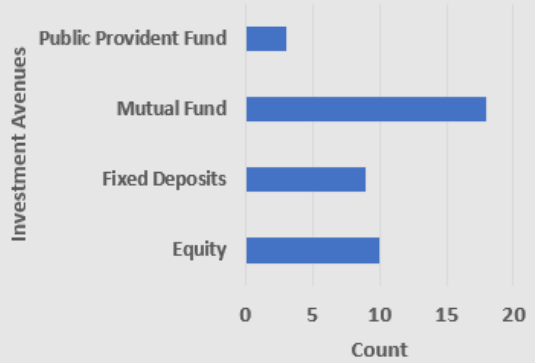


Scatter with only Markers



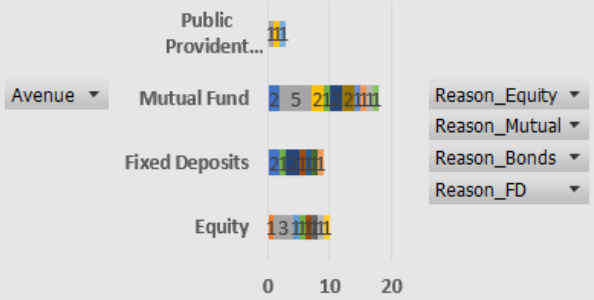
Count of Avenue

Distribution of Investment Avenues



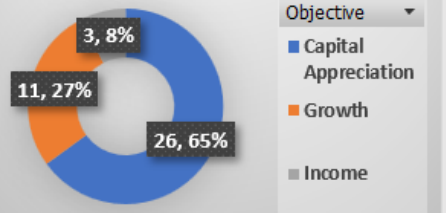
Count of Avenue

Reasons for Investment Choices by Avenue



Count of Objective

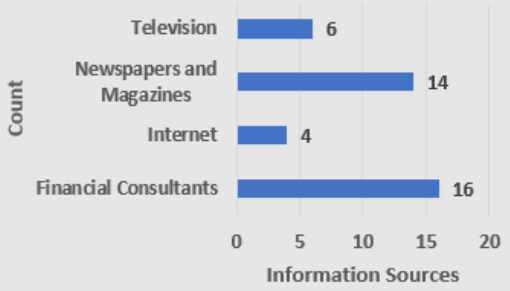
Distribution of Savings Objectives



Investment Duration vs. Expected Returns with Age

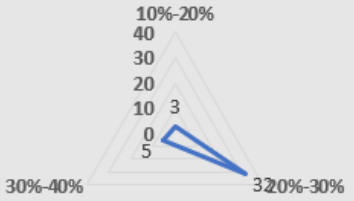
Count of Source

Frequency of Information Sources



Count of Expect

Participants' Investment Expectations



Thanks

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