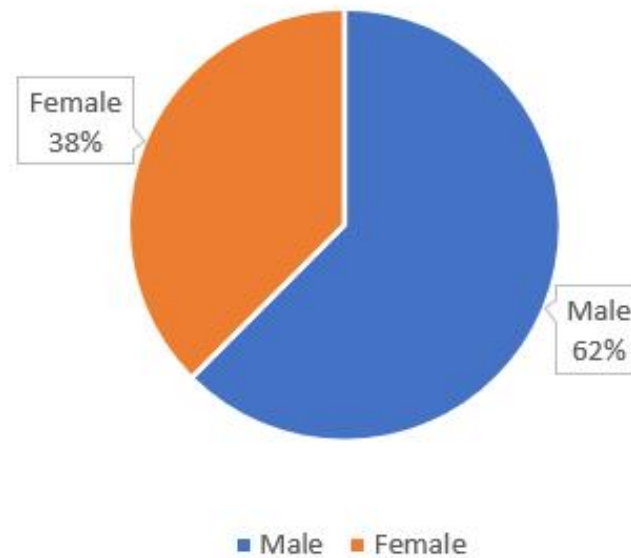


## Task 1 : Gender Distribution Analysis in Excel

Gender	Count
Male	25
Female	15

Gender Distribution

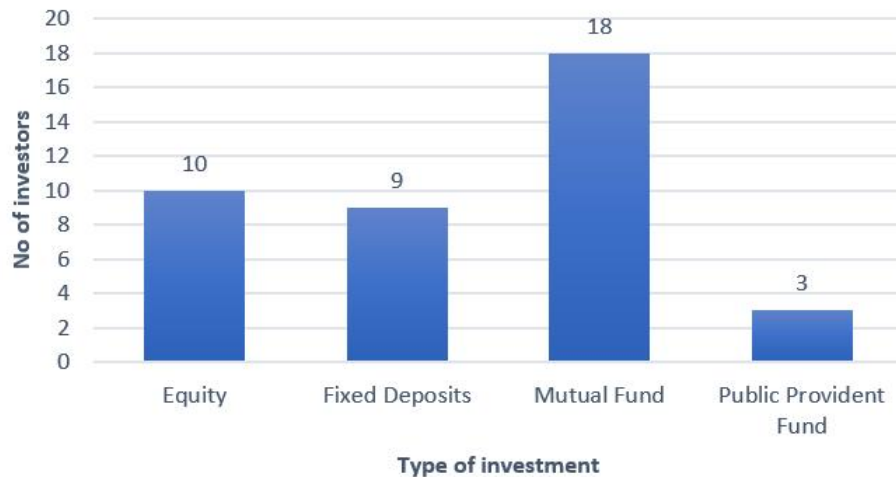


## Task 2 : Investment Preferences Analysis in Excel

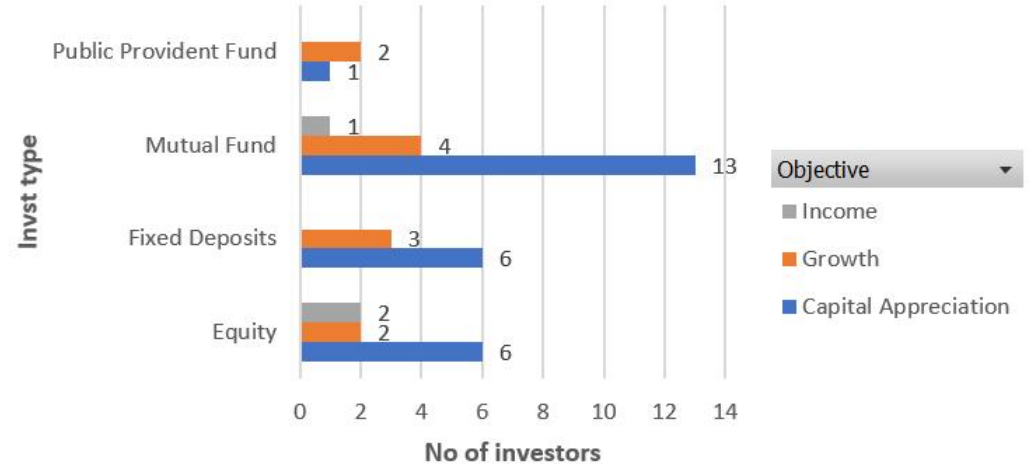
Investment type	No of investors
Equity	10
Fixed Deposits	9
Mutual Fund	18
Public Provident Fund	3
<b>Grand Total</b>	<b>40</b>

No of investors	Column Labels			
Reasons in investment type	Capital Appreciation	Growth	Income	Grand Total
Equity	6	2	2	10
Fixed Deposits	6	3		9
Mutual Fund	13	4	1	18
Public Provident Fund	1	2		3
<b>Grand Total</b>	<b>26</b>	<b>11</b>	<b>3</b>	<b>40</b>

Investment type distribution



Reasons with invest type choice



## Task 3 : Objective and Source Analysis in Excel

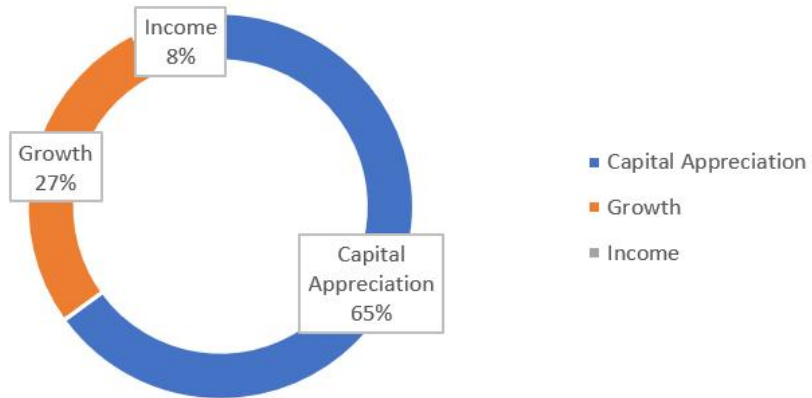
### Savings Objective ▾ No of participants

Capital Appreciation	26
Growth	11
Income	3
<b>Grand Total</b>	<b>40</b>

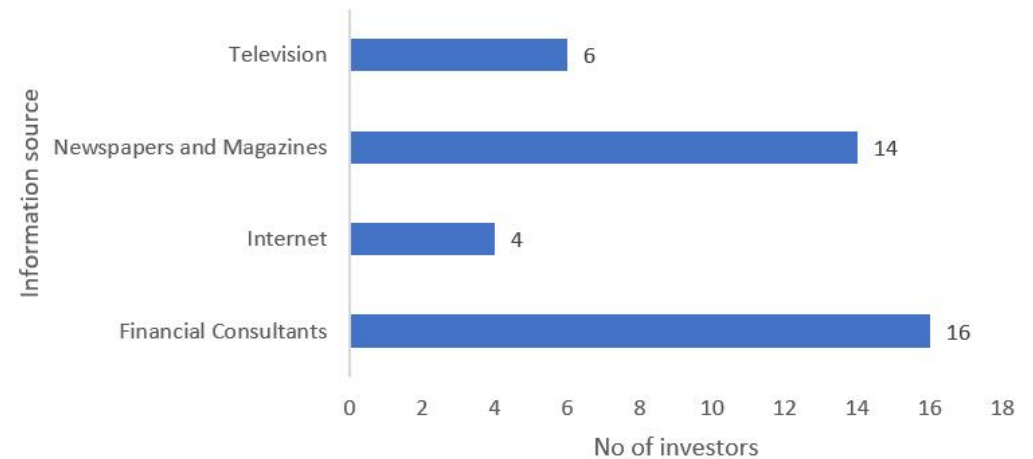
### Info source used for investment ▾ No of investors

Financial Consultants	16
Internet	4
Newspapers and Magazines	14
Television	6
<b>Grand Total</b>	<b>40</b>

Distribution of savings objective



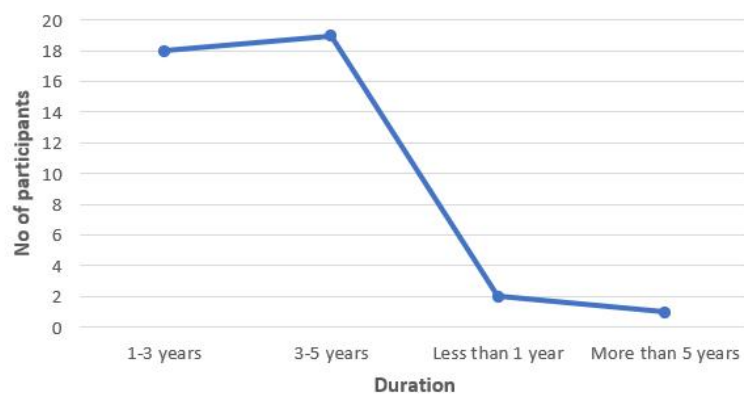
No of investments using diff info source



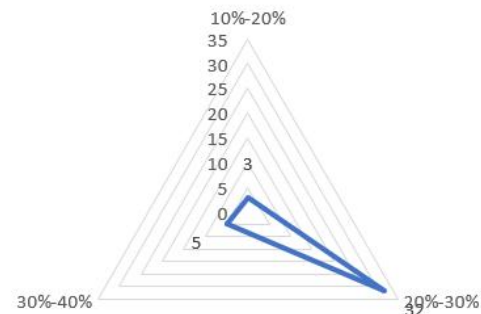
## Task 4 : Duration and Expectations Analysis

Duration	No of participants	Expected return %	No of participants	Expec % on diff investment	No of participants
1-3 years	18	10%-20%	3	Equity	10
3-5 years	19	20%-30%	32	10%-20%	1
Less than 1 year	2	30%-40%	5	20%-30%	8
More than 5 years	1	Grand Total	40	30%-40%	1
Grand Total	40			Fixed Deposits	9
				20%-30%	8
				30%-40%	1
				Mutual Fund	18
				10%-20%	2
				20%-30%	15
				30%-40%	1
				Public Provident Fund	3
				20%-30%	1
				30%-40%	2
				Grand Total	40

No of participants invest for diff time period



Radar chart for expectation Analysis

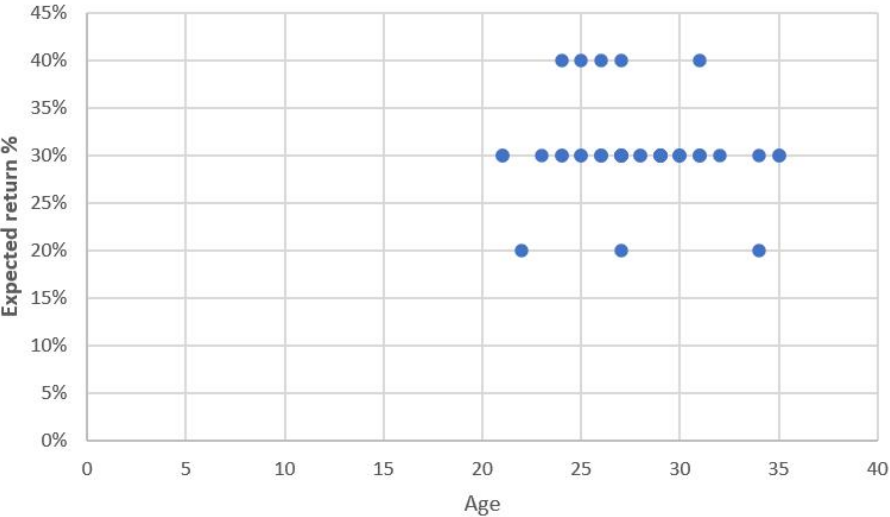


Task 5 : Correlation Analysis

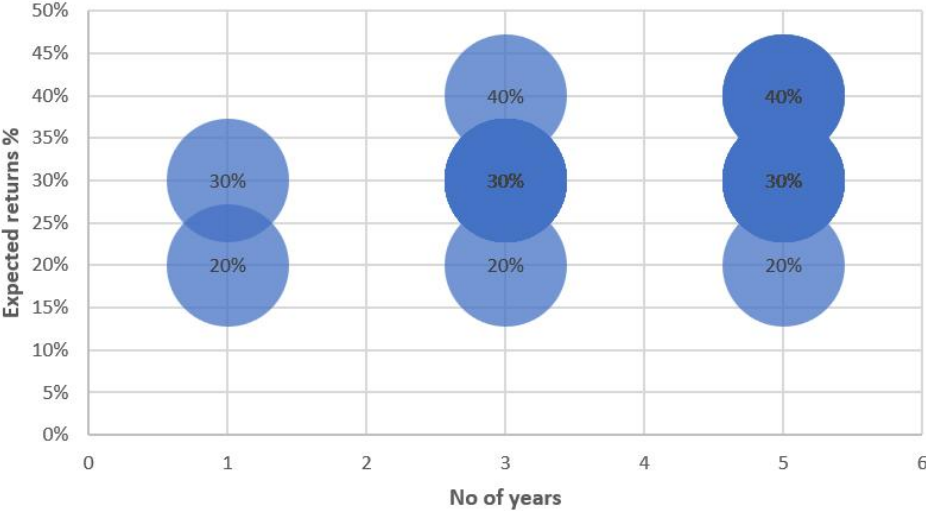
Expected return ▾	No of participants
10%-20%	3
20%-30%	32
30%-40%	5
Grand Total	40

Duration year ▾	Most no of Returns
1	2
3	19
5	19
Grand Total	40

Expected return% vs age

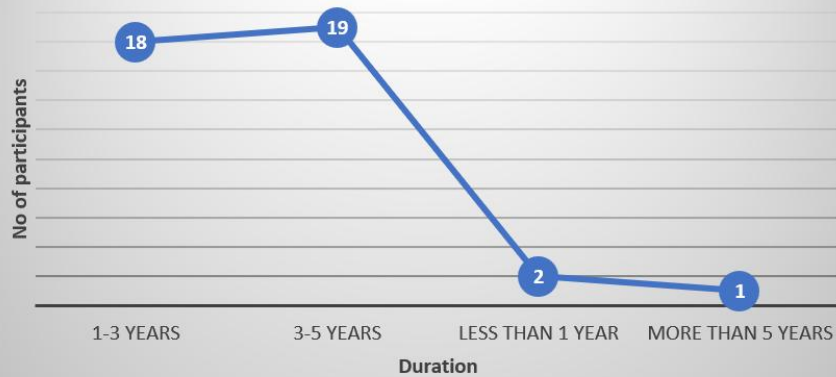


Duration year vs Expected returns %

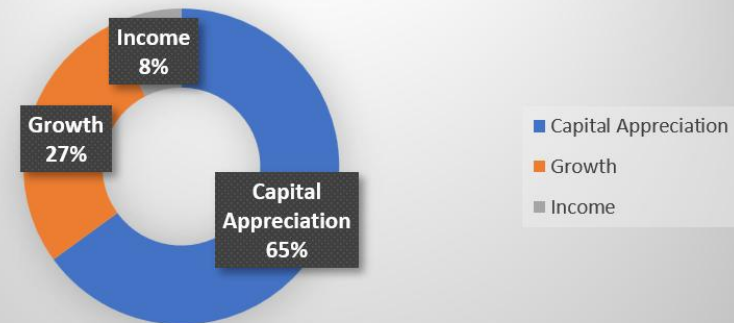


## Task 6 : Investment Analysis Dashboard

### No of participants at diff time period



### Distribution of savings objective



No of participants

40

Purpose

Returns

Savings for Future

Wealth Creation

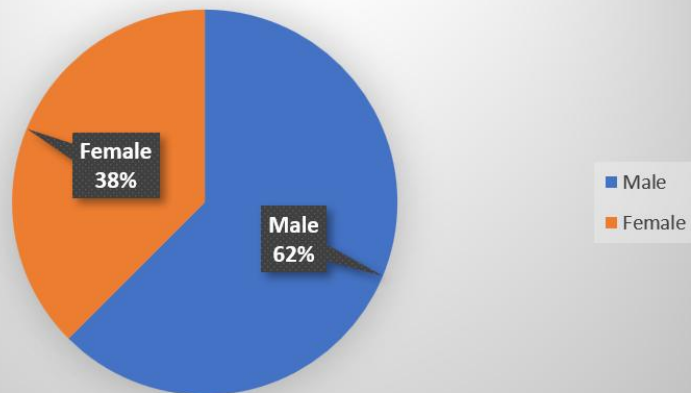
Invest\_Monitor

Daily

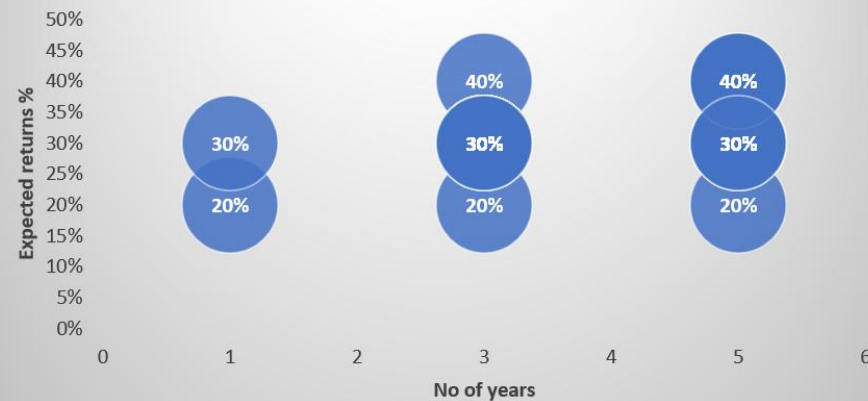
Monthly

Weekly

### Gender Distribution



### Duration year vs Expected returns %



Avenue

Equity

Fixed Deposits

Mutual Fund

Public Provident Fund