



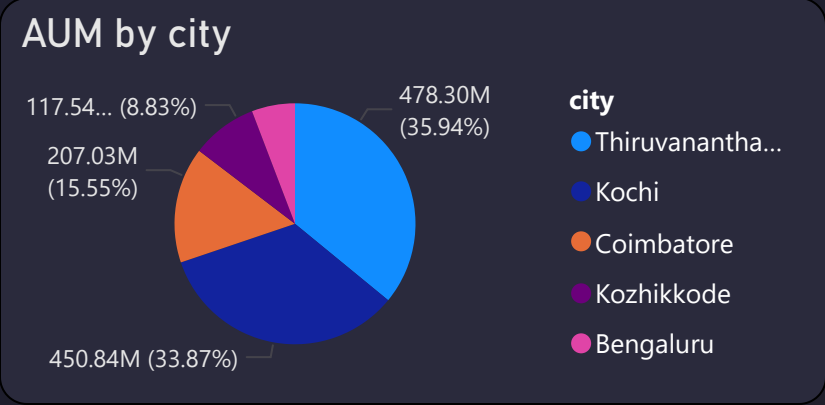
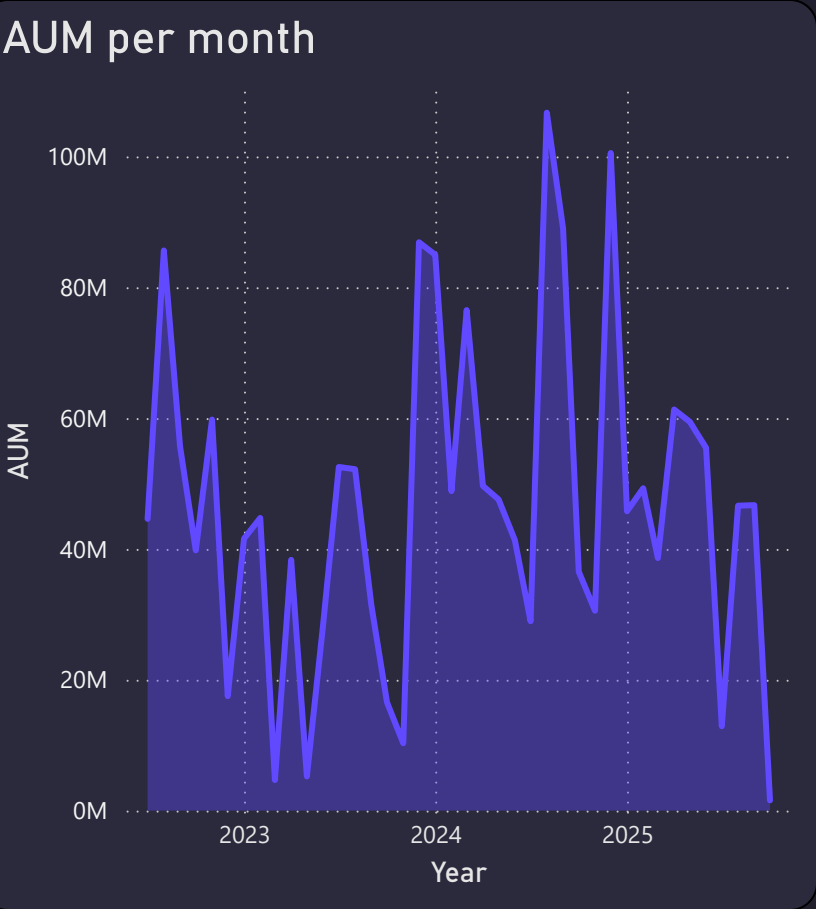
EXECUTIVE DASHBOARD

1.33bn

AUM

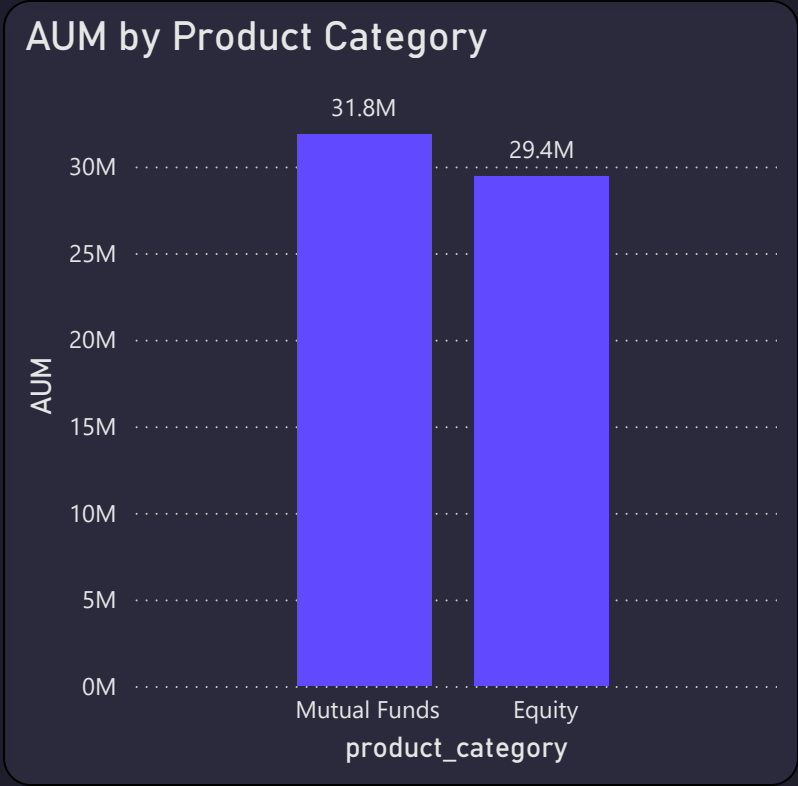
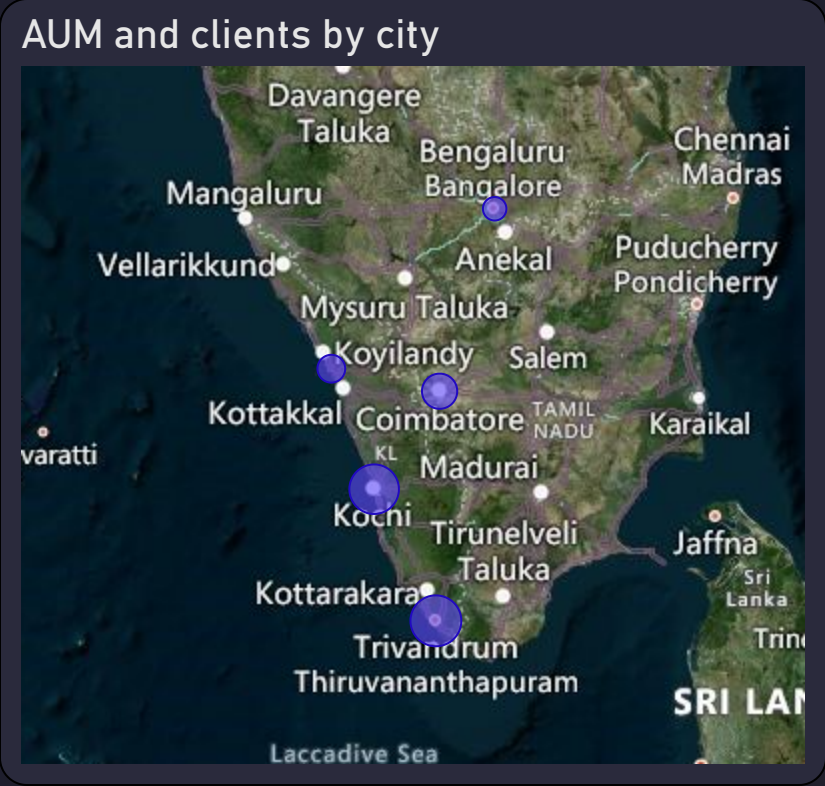
200

clients



Monetary x Recency Segments

Monetary Segment	Active	Dormant	Occasional
Medium Value	45	11	2
Low Value	7	30	1
High Value	48	3	2





BRANCH DASHBOARD

Kochi

Branch

60

clients

450.84M

Branch AUM

25%

Reactivation rate

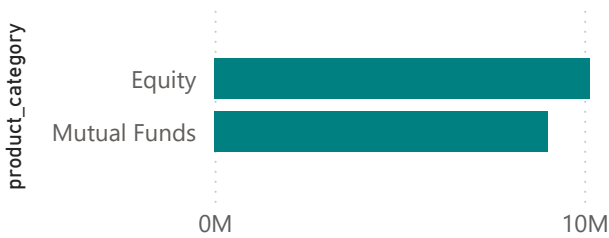
18%

Cross selling rate

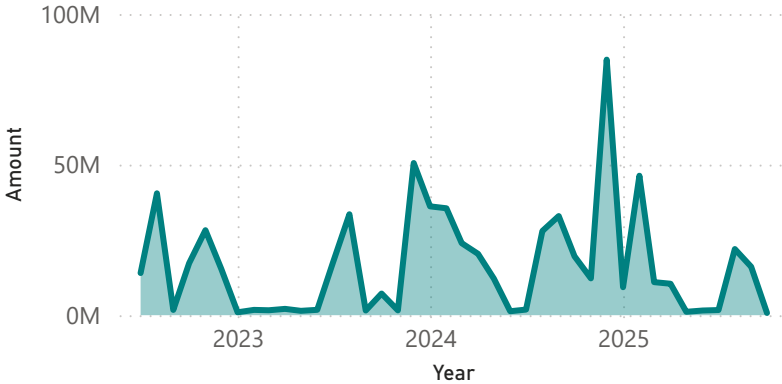
Top Priorities

customer_id	customer_name	RFM Score	AUM	Opp
1019	Rahul Kumar	0-0-0		P0:
1076	Senthil Rao	0-0-0		P0:
1114	Kavya Pillai	0-0-0		P0:
1122	Sidharth Reddy	0-0-0		P0:
1138	Gokul Nair	0-0-0		P0:
1141	Meera Rao	0-0-0		P0:
1170	Anjali Reddy	0-0-0		P0:
1150	Rahul Reddy	1-3-5	15838760.00	P1:
1003	Suresh Pillai	1-1-2	335259.00	P2:
1055	Arjun Kumar	1-2-2	317808.00	P2:
1154	Arjun Pillai	1-1-3	430927.00	P2:
1004	Vishnu Sharma	3-4-4	13355756.00	Sta
Total			450835223.00	

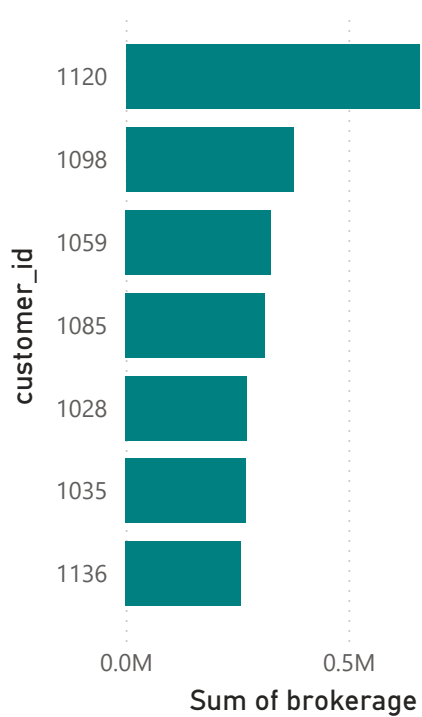
AUM by product_category



AUM by Year and Month



Sum of brokerage by customer_id





CUSTOMER DASHBOARD

Name

Suresh Pillai

AUM

11.44M

Branch

Kochi

Joined on

10-07-2020

Dormant days

8

RFM Score

5-4-4

Product	Transaction	Amount	Date
EQ01	Buy	164842	02-06-2024
EQ01	Sell	455615	04-06-2024
EQ01	Buy	91419	05-10-2025
EQ01	Buy	151650	07-09-2025
EQ01	Buy	33834	12-09-2022
EQ01	Sell	10516	16-02-2025
EQ01	Buy	181343	21-12-2022
EQ01	Buy	38649	22-08-2022
EQ01	Buy	186902	26-08-2024
MF01	Sell	153952	01-03-2025
Total		12765598	

Holdings

