# TABLEAU PRESENTATION

By: Dedan Odira

# Introduction

- Welcome to this comprehensive financial data analysis project!
- The objective of this project is to provide insightful analysis and visualization of financial data using Tableua.
- I aim to uncover trends, patterns, and actionable insights to enhace decision-making and strategic planning.

# Data Overview

- Our data set is (Financial Data)
- With the following columns {date, transaction ID, account ID, transaction type, amount, currency, account balance, branch location, customer age, customer income, account type}

# Time Series Analysis

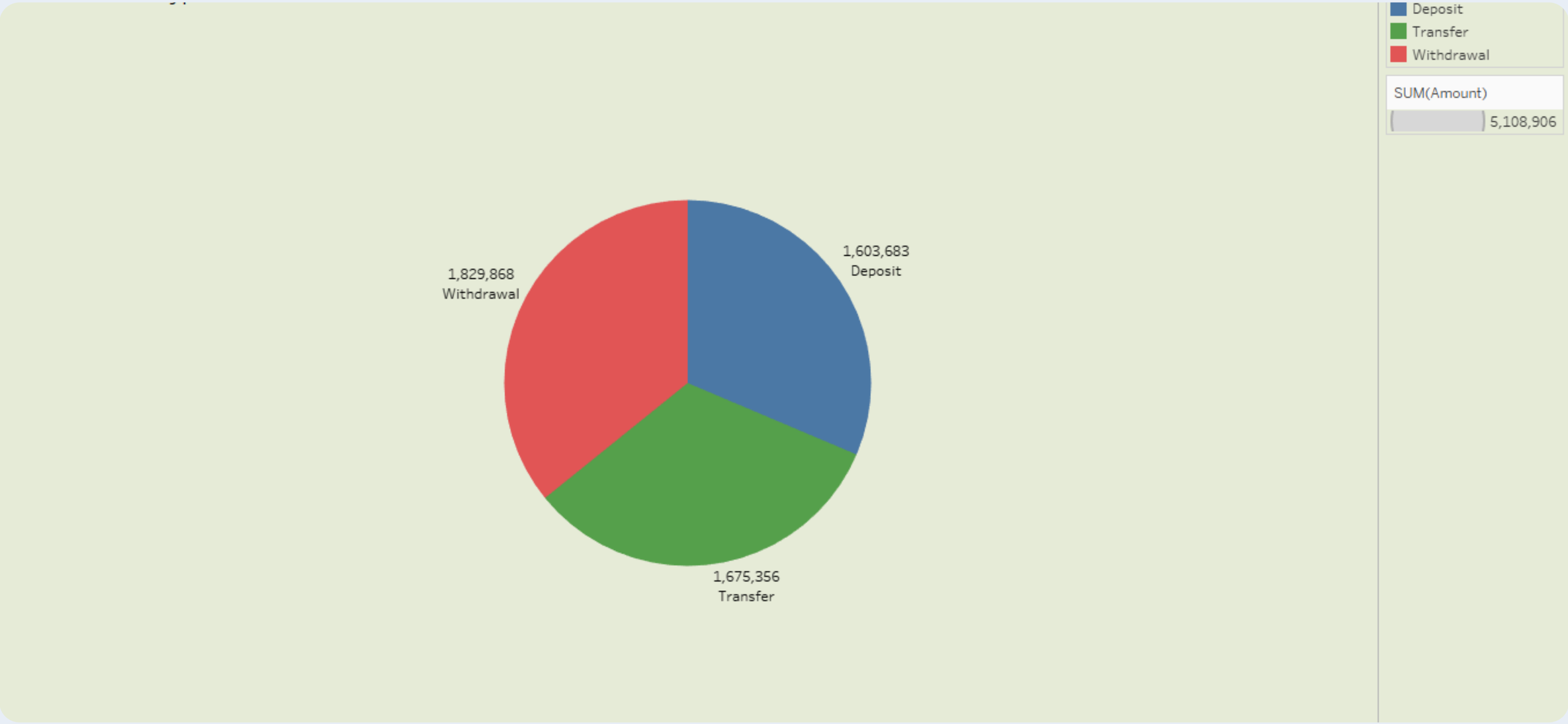
This line chart visualizes the trend of transaction amounts over time, highlighting periods of high and low activity. It helps identify seasonal patterns and peak periods, essential for strategic planning and operational optimization.

# Time Series Analysis

# Transaction Type Distribution

- This chart shows the distribution of different transaction types, revealing customer preferences. Understanding transaction types aids in refining our financial products and services.

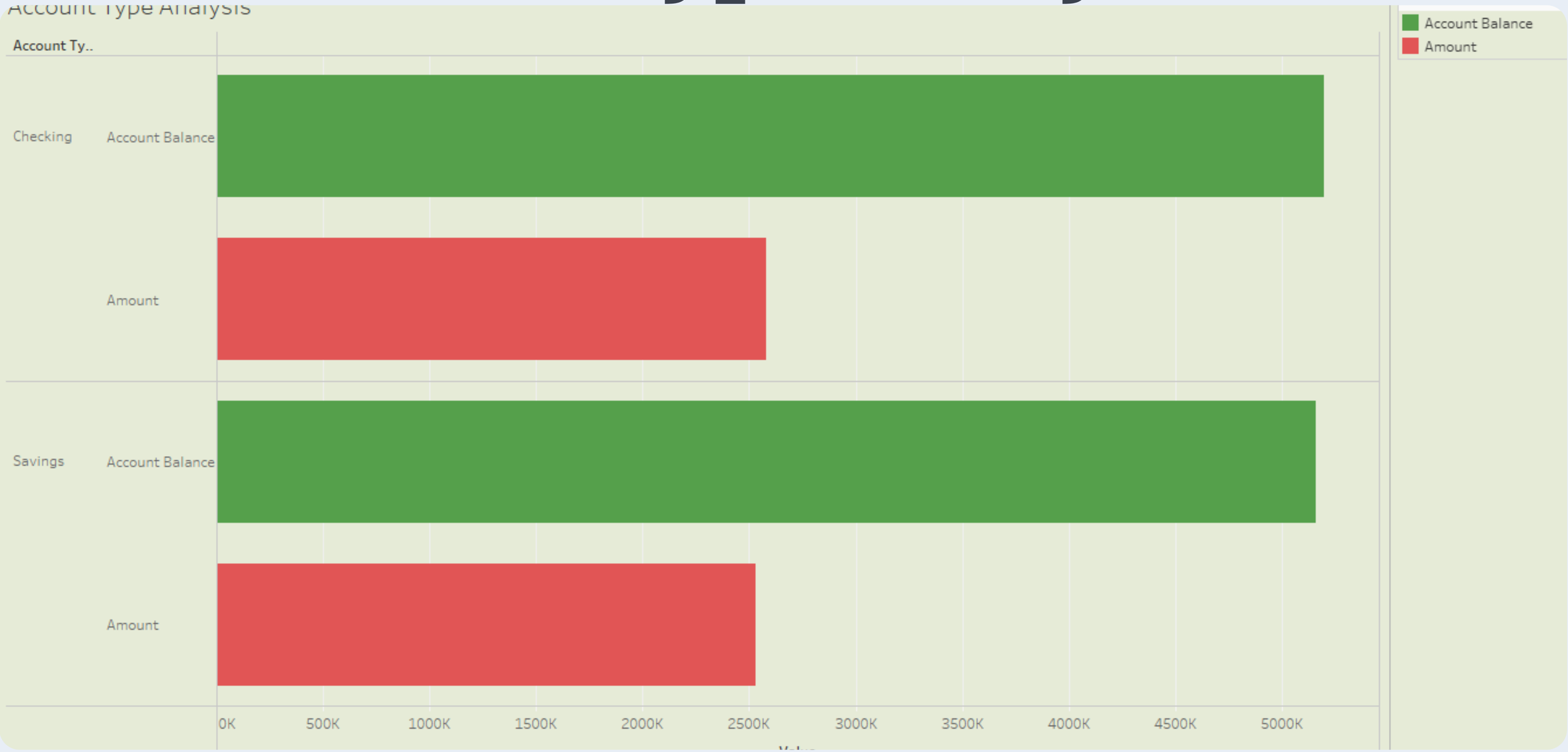
# Transaction Type Distribution



# Account Type Analysis

- This chart displays transaction volumes and balances by account type, identifying the most popular and lucrative accounts. It guides product development and targeting strategies.

# Account Type Analysis



# Customer Segmentation

- This table chart segments customers based on transaction amounts, age, and income, helping to identify high-value customers and various demographic clusters for targeted marketing.

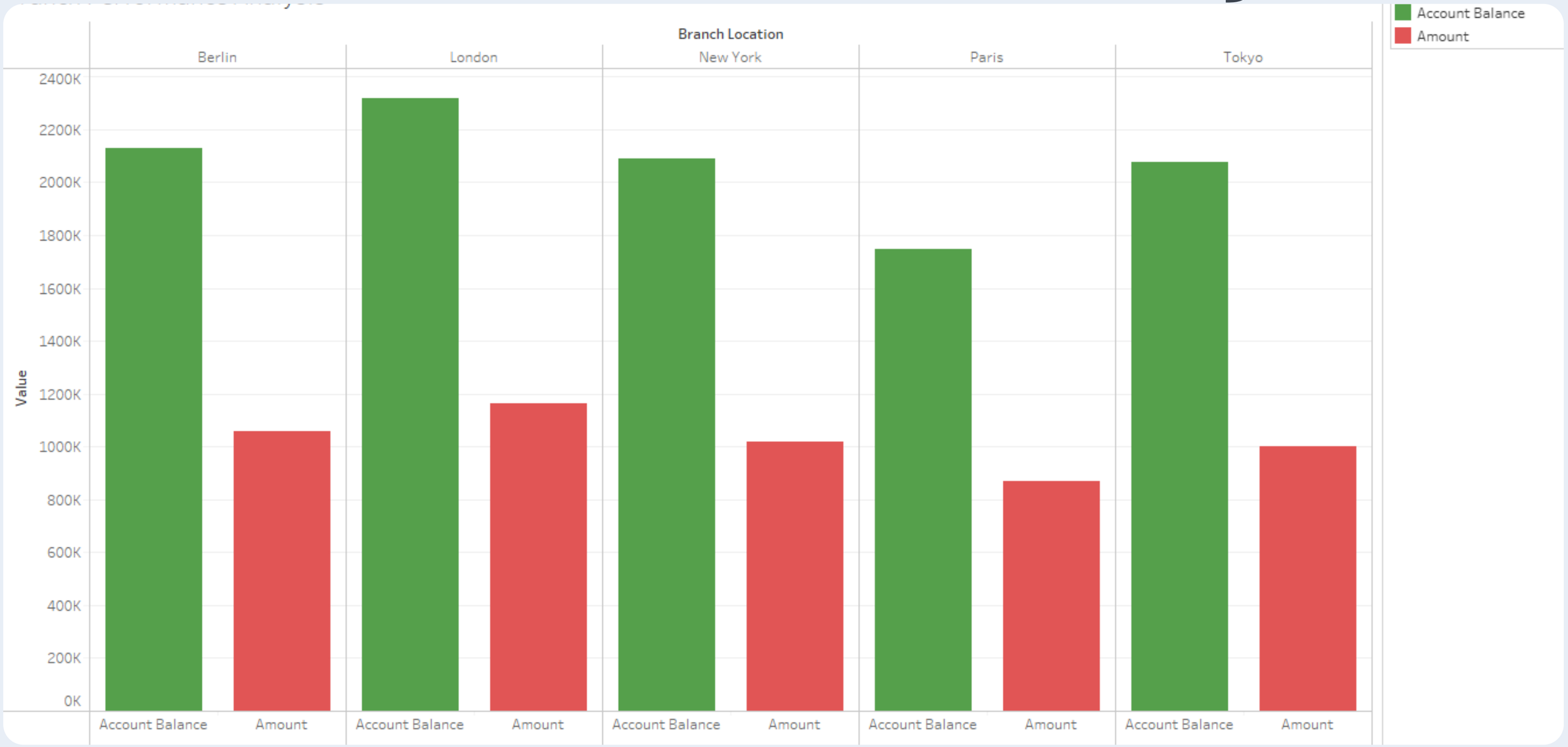
# Customer Segmentation

| Transaction ID | Account Balance | Amount | Count of Sheet1 | Customer Age | Customer Income |
|---|---|---|---|---|---|
| TXN00732 | 19,262 | 9,854 | 1 | 57 | 143,110 |
| TXN00557 | 18,914 | 9,927 | 1 | 25 | 139,760 |
| TXN00453 | 18,923 | 9,063 | 1 | 62 | 102,935 |
| TXN00555 | 19,071 | 9,830 | 1 | 28 | 97,516 |
| TXN00509 | 19,760 | 9,839 | 1 | 65 | 85,552 |
| TXN00701 | 19,512 | 9,569 | 1 | 65 | 73,154 |
| TXN00332 | 18,908 | 9,385 | 1 | 29 | 61,074 |
| TXN00309 | 18,904 | 9,998 | 1 | 40 | 49,321 |
| TXN00307 | 19,184 | 9,392 | 1 | 66 | 33,547 |
| TXN00101 | 19,421 | 9,919 | 1 | 66 | 32,035 |
| TXN00062 | 18,804 | 9,874 | 1 | 26 | 28,464 |
| TXN00076 | 18,673 | 9,708 | 1 | 38 | 110,803 |
| TXN00100 | 18,776 | 9,451 | 1 | 65 | 49,867 |
| TXN00367 | 18,878 | 9,439 | 1 | 64 | 33,931 |
| TXN00467 | 18,470 | 9,562 | 1 | 19 | 30,767 |
| TXN00603 | 18,704 | 8,878 | 1 | 54 | 58,316 |
| TXN00660 | 18,420 | 8,663 | 1 | 31 | 80,521 |
| TXN00935 | 18,423 | 9,193 | 1 | 59 | 40,282 |
| TXN00951 | 18,821 | 9,291 | 1 | 49 | 80,918 |
| TXN00960 | 18,513 | 8,902 | 1 | 44 | 50,961 |

# Branch Performance Analysis

- This chart compares branch performance in transaction volumes and account balances, guiding resource allocation and operational strategies.

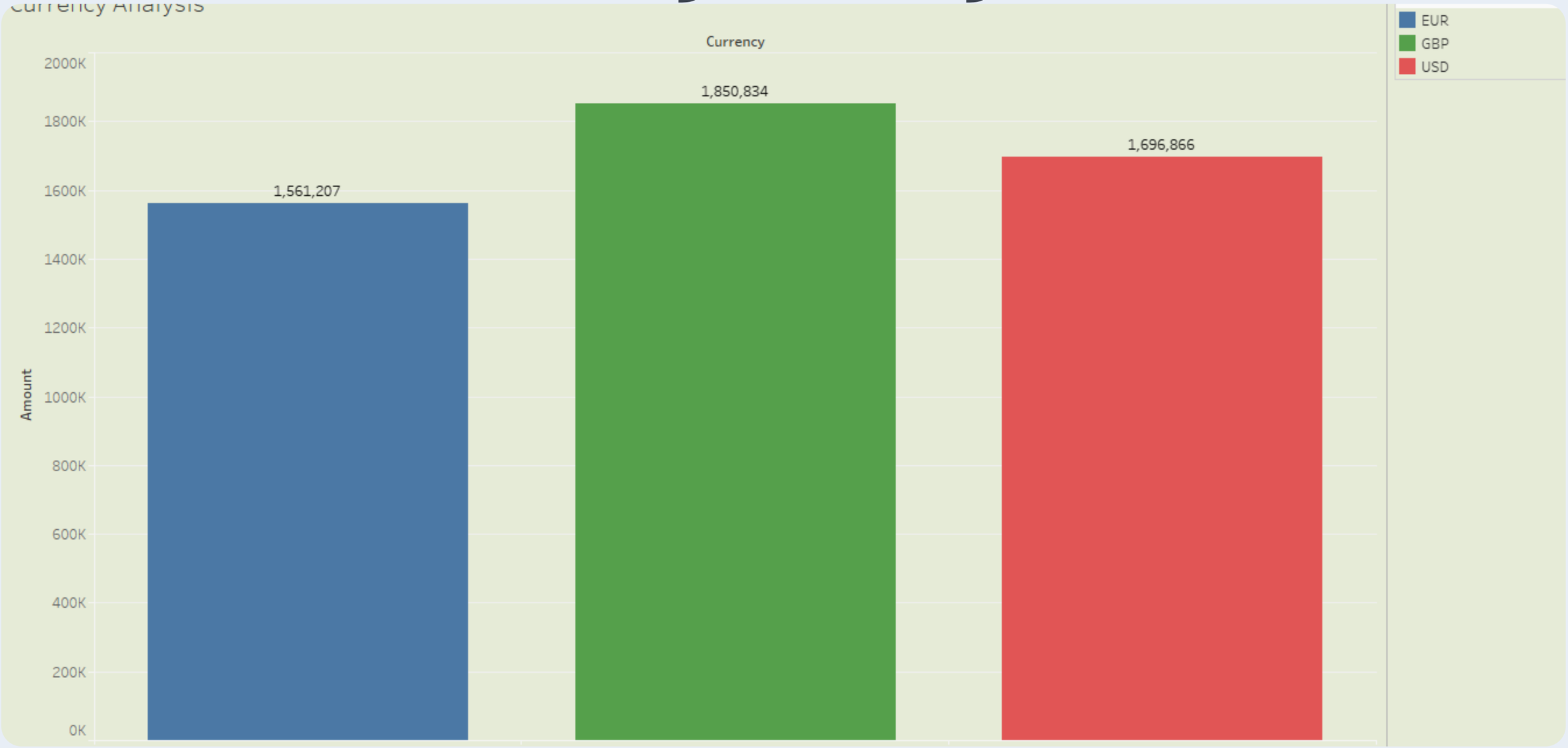
# Branch Performance Analysis



# Currency Analysis

- This chart breaks down transactions by currency, understanding international business scope and currency risk exposure.

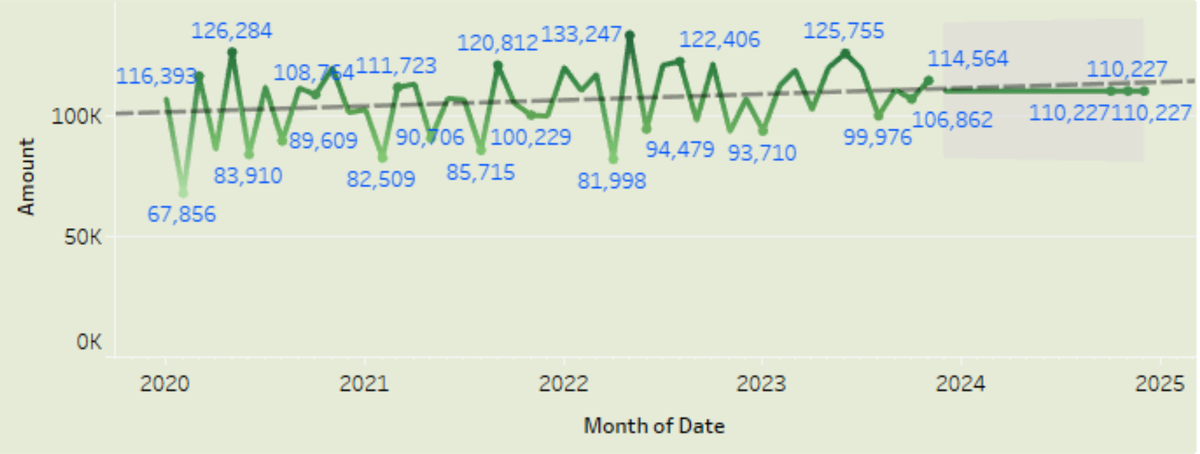
# Currency Analysis



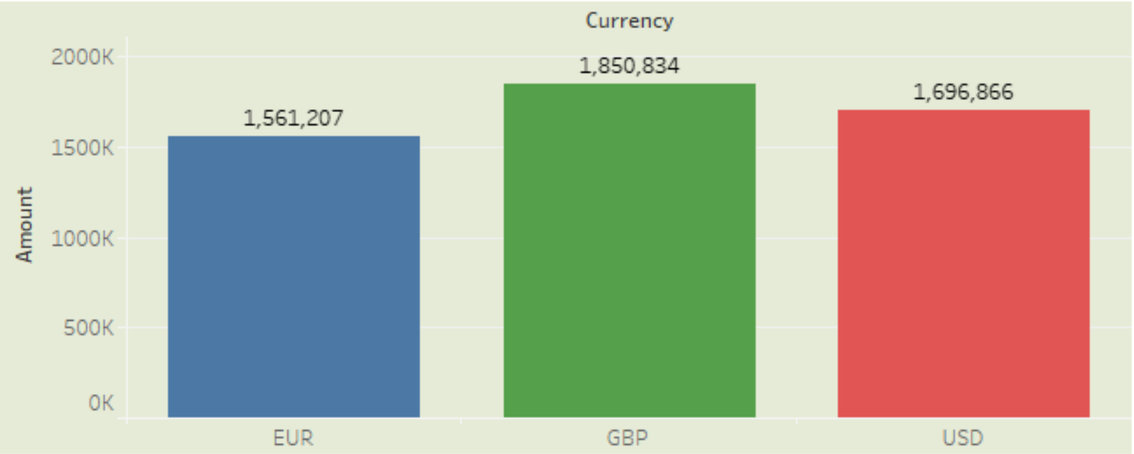
# Dashboard

## Financial Analysis Dashboard

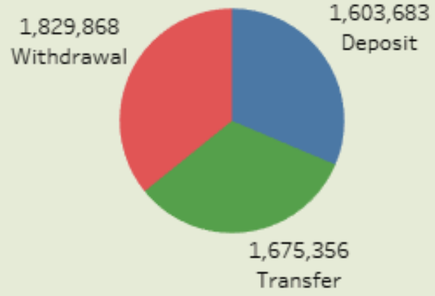
### <Transaction trends>




### Currency Analysis




### <Transaction Type Distribution>




### Customer Segmentation

| Transaction.. | Accoun.. | Amount | Count o.. | Custom.. | Custom.. |
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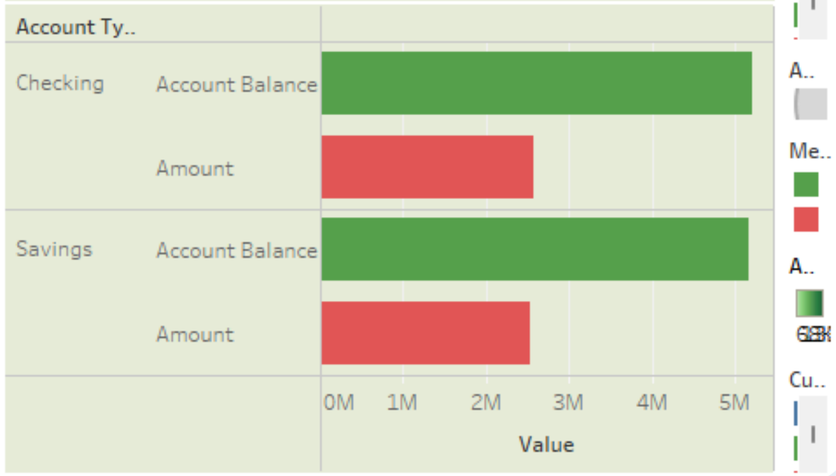

# Action Plan

- Optimize Peak Periods: Increase staffing and marketing efforts during peak transaction periods identified in the time series analysis.
- Support Underperforming Branches: Allocate additional resources and targeted strategies to branches with lower transaction volumes.
- Manage Currency Risk: Use currency analysis to manage exposure and inform international business strategies.
- Focus on High-Value Customers: Develop special programs and services for high-value customer segments identified through segmentation analysis.

# Conclusion

- This comprehensive analysis of financial data reveals crucial insights into transaction trends, customer demographics, geographic performance, and more. These insights facilitate informed decisions, optimize resource allocation, and tailor our products and services to better meet customer needs.

# Thank You