

# Task 1

## Task : Data Exploration and Summary

**Objective:** Understand and summarize key statistics in the dataset.

### Steps:

1. **Data Import:** Import the dataset into Power BI.
2. **Exploratory Analysis:** Explore the dataset structure and data types.
3. **Calculate Statistics:** Compute average age, percentage of individuals with various investments, and common savings objectives.
4. **Visualization:** Create charts for effective visualization of the summary statistics.



# TASK 1: Data Exploration and Summary

## Age Slicer

21	25	29	34
22	26	30	35
23	27	31	
24	28	32	

## Average Age

**27.80**

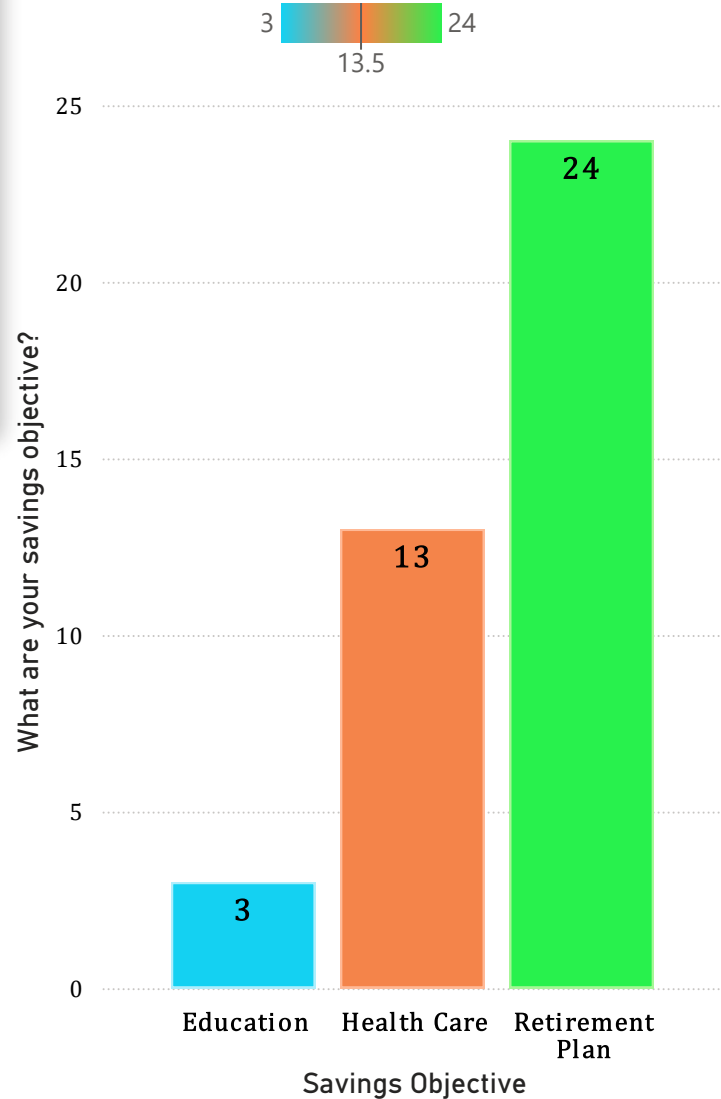
## Investment Avenue: YES

**37**

## Investment Avenue: NO

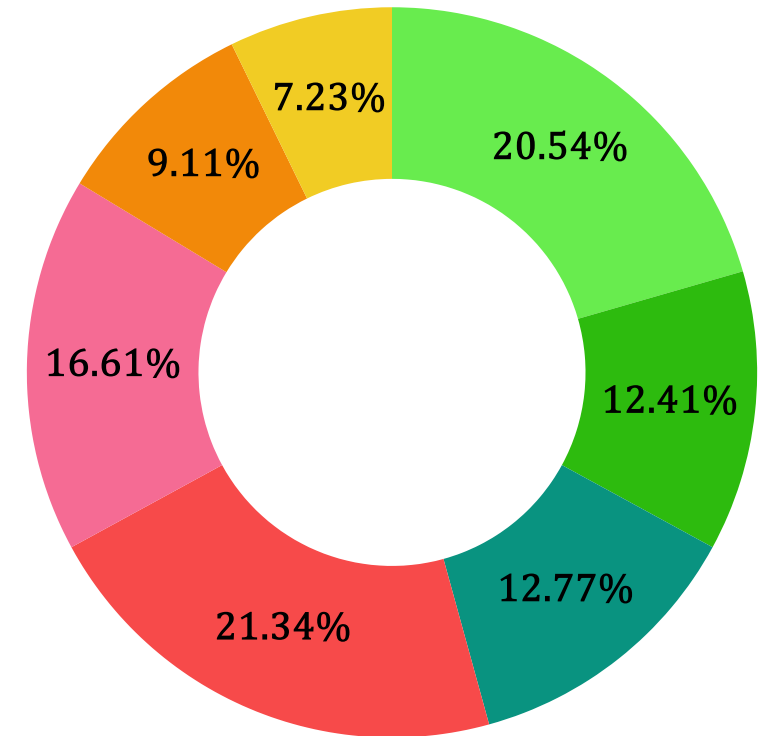
**3**

## Common Savings Objective



## Percentage of Individuals with Various Investments

● Debenture ● Equity ● FD ● Gold ● Govt. Bond ● Mutual Funds ● PPFs



# Task 2



## Task : Gender-based Analysis

**Objective:** Analyze and visualize gender-based differences in investment preferences.

### Steps:

1. **Visual Comparison:** Create charts comparing investment choices (equity, mutual funds, government bonds) based on gender.
2. **Insights:** Derive insights from the visualizations, noting significant gender-based trends.

## TASK 2: Gender-based Analysis

Total Investor

40

Minimum Age

21

Maximum Age

35

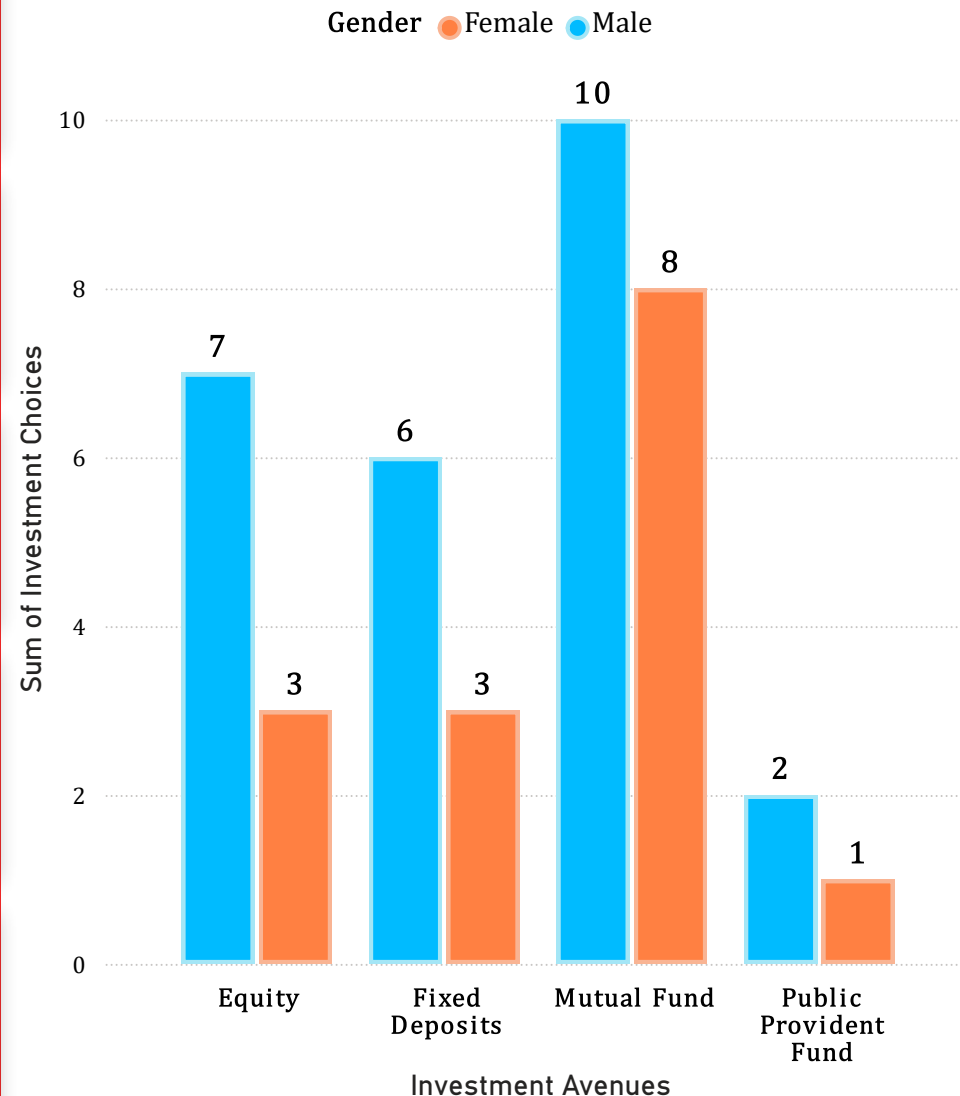
Count of Female

15

Count of Male

25

Investment Choices based on Gender



Key Insights

### GENDER DIFFERENCE:

- Males show a slightly higher preference for Mutual Funds and Equity compared to females. This could suggest a higher risk appetite among males.
- Females show a slightly higher preference for Fixed Deposits and Public Provident Funds compared to males. This could indicate a preference for stability and lower risk among females.

### OVERALL INVESTMENT BEHAVIOUR:

- **MOST POPULAR:** Mutual Funds: It suggests that mutual funds are considered relatively accessible and less risky compared to other options.
- **SECOND MOST POPULAR:** Equity: Indicating a willingness to take on some risk for potentially higher returns.
- **LEAST POPULAR:** Fixed Deposit & PPF: This might be due to factors like lower potential returns or perceived lack of flexibility.

# Task 3



## Task : Objective Analysis

**Objective:** Analyze the relationship between savings objectives and investment choices.

### Steps:

1. **Correlation Analysis:** Explore the correlation between savings objectives (e.g., Capital Appreciation) and investment avenues (e.g., Equity).
2. **Chart Creation:** Generate charts displaying preferred investment choices for each savings objective.

# TASK 3: Investment Avenues & Savings Objectives

Avg. Equity

**3.48**

Avg. Fixed Deposits

**3.58**

Avg. Govt. Bonds

**4.65**

Avg. Debentures

**5.75**

Avg. Gold

**5.98**

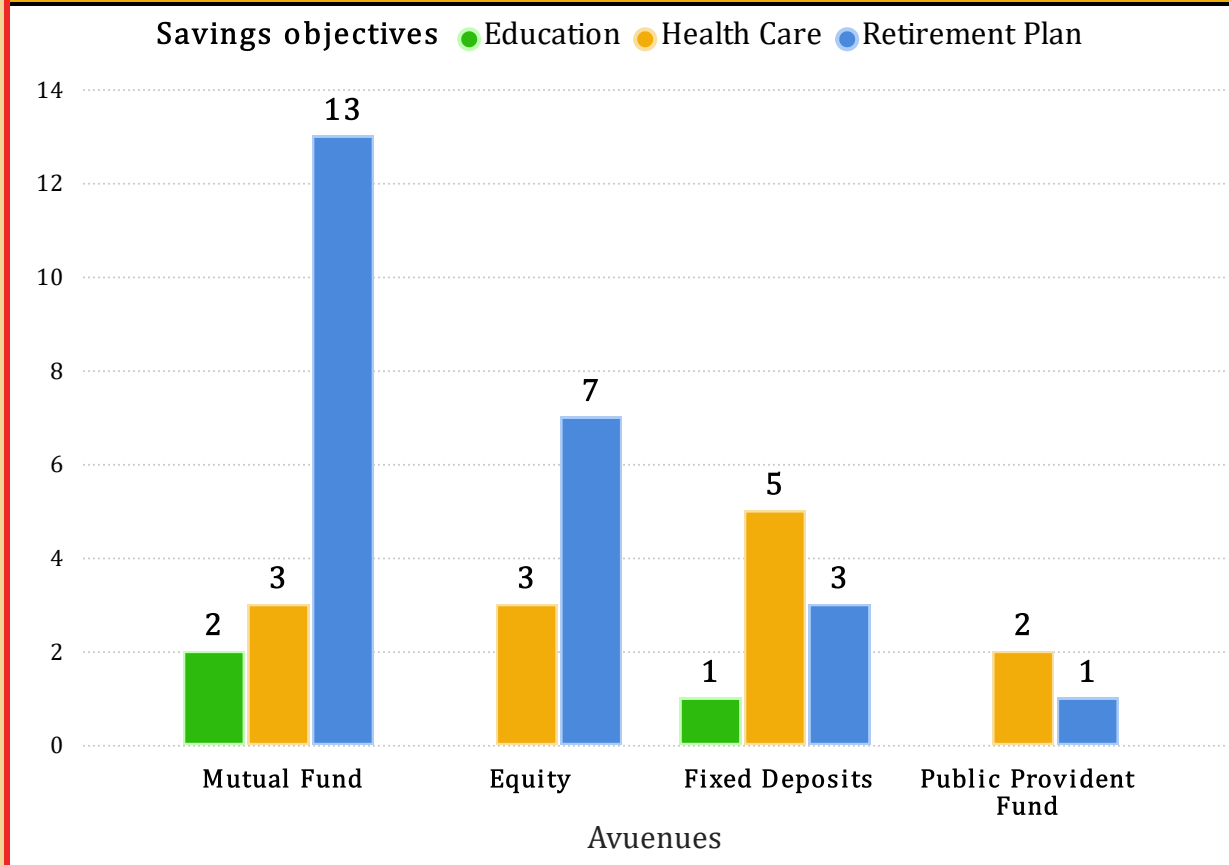
Avg. Mutual Funds

**2.55**

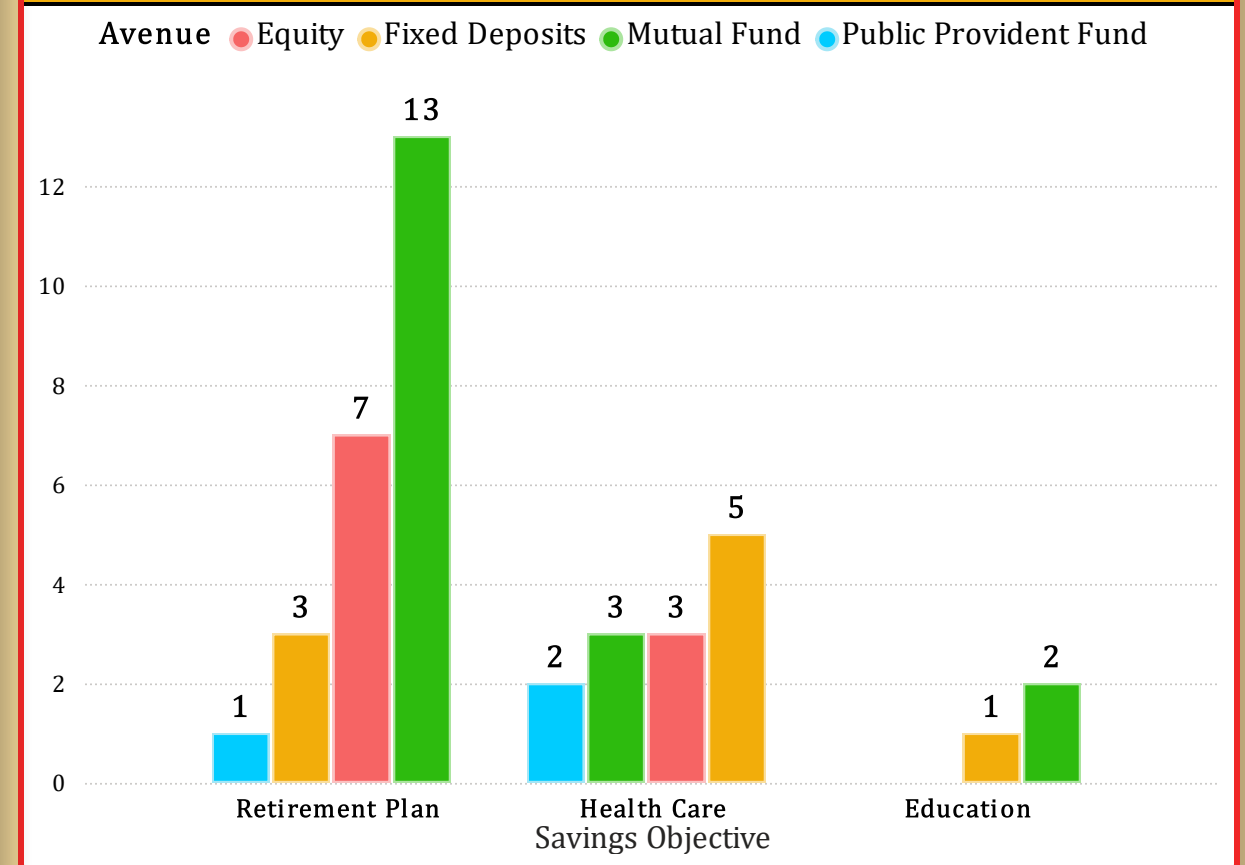
Avg. PPF

**2.03**

Total Objectives by Avenues



Total Avenue by Objective



# Task 4



## Task: : Investment Duration and Frequency

**Objective:** Analyze investment durations and monitoring frequencies.

### Steps:

1. **Duration Distribution:** Visualize the distribution of investment durations.
2. **Frequency Analysis:** Examine investment monitoring frequencies and their impact on investment preferences.

# TASK 4: Investment Duration & Frequency

## Gender Filter

Female

Male

## Frequency Filter

Daily

Monthly

Weekly

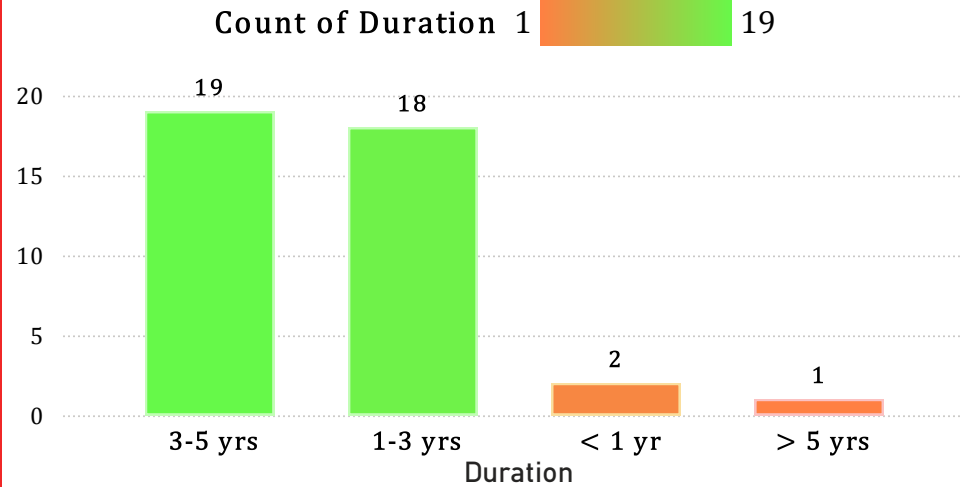
## Duration vs Frequency

Duration	Daily	Monthly	Weekly
< 1 yr	2		
> 5 yrs			1
1-3 yrs	1	13	4
3-5 yrs	1	16	2
Total	4	29	7

## Frequency vs Investor

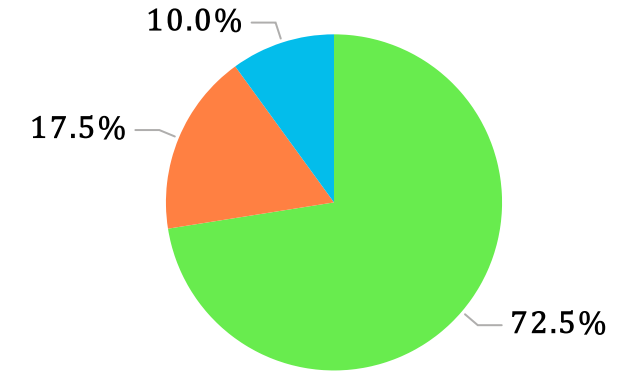
Invest_Monitor	Female	Male
Daily	2	2
Monthly	11	18
Weekly	2	5
Total	15	25

## Investment Duration Distribution

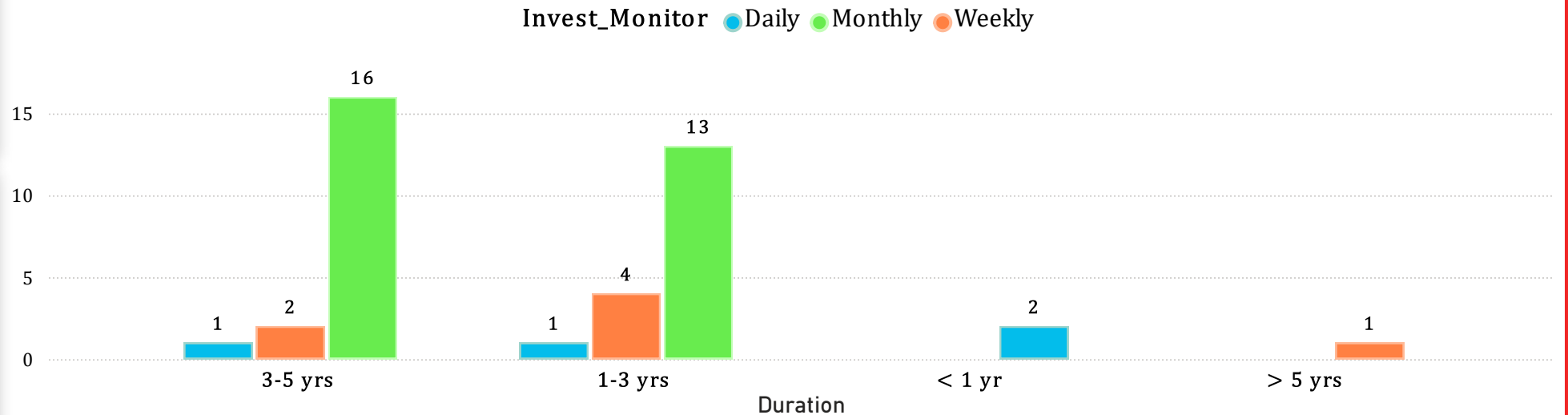


## Monitoring Frequency Duration

Invest\_Monitor ● Monthly ● Weekly ● Daily



## Monitoring Frequency by Investment Duration





# Task 5



## Task: Reasons for Investment

**Objective: Analyze and visualize the reasons for investment.**

### Steps:

- 1. Trend Analysis: Identify common trends in reasons for investment (e.g., Better Returns, Tax Benefits).**
- 2. Visualization: Create charts showing the most frequently cited reasons for investing.**

# TASK 5: Reasons for Investment

Age

21

35



Investor Gender

Female

Male

Total Investors

40

Overview

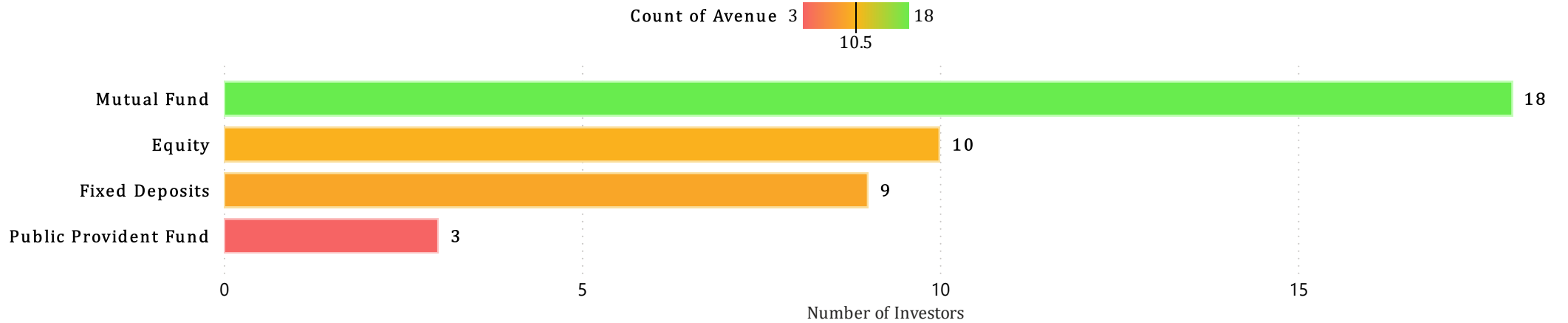
Equity Reason

Mutual Fund Reason

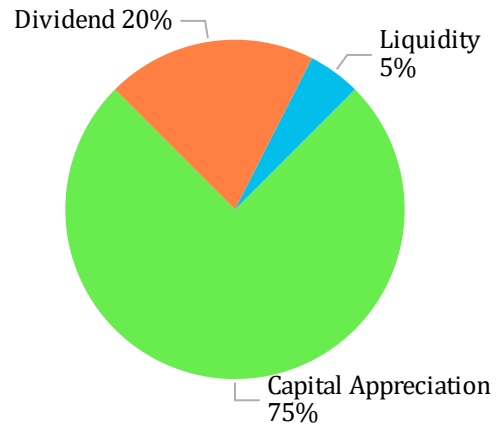
Bond Reason

Fixed Deposit Reason

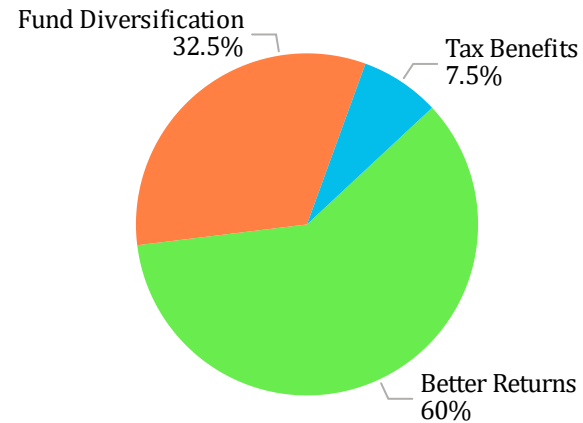
## Preferred Investment Avenues



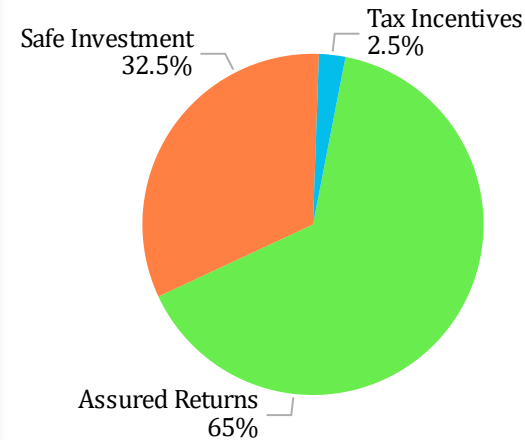
## % Equity Investment



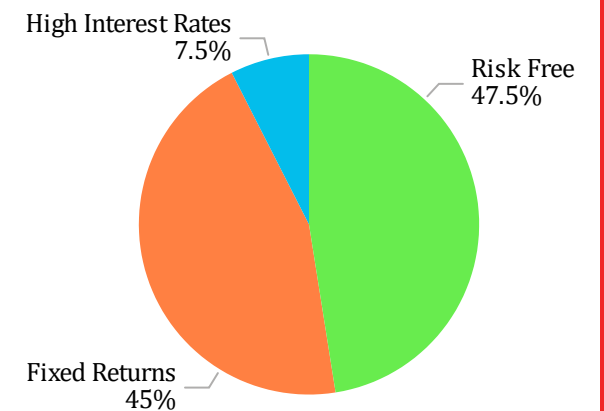
## % Mutual Fund Investment



## % Bond Investment



## % Fixed Deposit Investment



# Task 6



## Task: Source of Information

**Objective:** Analyze the sources from which individuals gather investment information.

### Steps:

1. **Source Analysis:** Visualize where individuals get their investment information (e.g., Newspapers, Internet).
2. **Insight Extraction:** Analyze which sources are most commonly relied upon by investors.

## TASK 6: Source of Information

### Gender Filter

Female

Male

### Investment Avenue

No

Yes

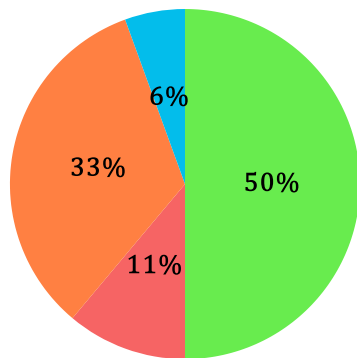
### Overview

### Demographic Analysis

### By Investment Avenue

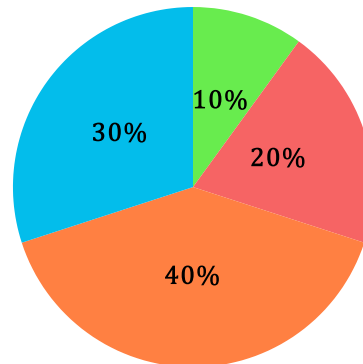
#### Mutual Fund Investor

● Financial Cons... ● Internet ● Newspapers ... ▶



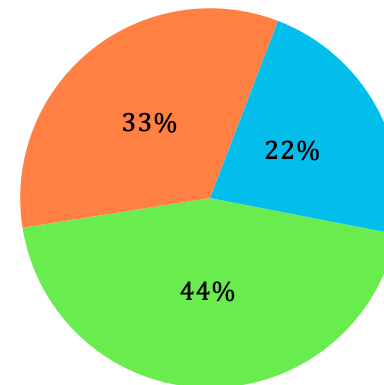
#### Equity Investor

● Financia... ● Internet ● Newspa... ● Television



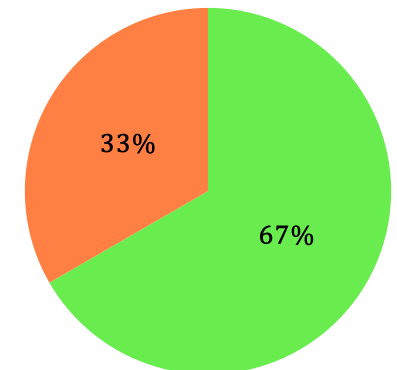
#### Fixed Deposit Investor

● Financial Consul... ● Newspapers ... ● Television



#### PPF Investor

● Financial Consultants ● Newspapers and Maga...



### Investment Avenue Key Insights

- **Mutual Fund Investors:** Primarily rely on Financial Consultants, suggesting they value professional guidance for these complex products.
- **Equity Investors:** More likely to use a mix of sources with higher reliance on traditional media.
- **Fixed Deposit Investors:** Show the strongest preference for Financial Consultants and traditional sources.
- **PPF Investors:** Heavily dependent on Financial Consultants, suggesting they seek tax and retirement planning advice.
- The more complex the investment avenue, the more likely investors are to seek professional guidance

# Task 7



## Task: Combine Insights into a Dashboard

**Objective:** Create a comprehensive dashboard incorporating all insights.

### Steps:

1. **Dashboard Design:** Design an intuitive dashboard layout in Power BI.
2. **Incorporate Insights:** Include visualizations from all previous analyses in the dashboard.
3. **Interactivity:** Add interactive elements for exploring the data further.
4. **Key Findings:** Summarize major insights derived from the analysis.
5. **Finalization:** Polish the dashboard for a professional appearance and user-friendly experience.

# TASK 7: Combine Insights into Dashboard

## Gender Filter

Female

Male

## Age Filter

All



## Source

All



## Avenue

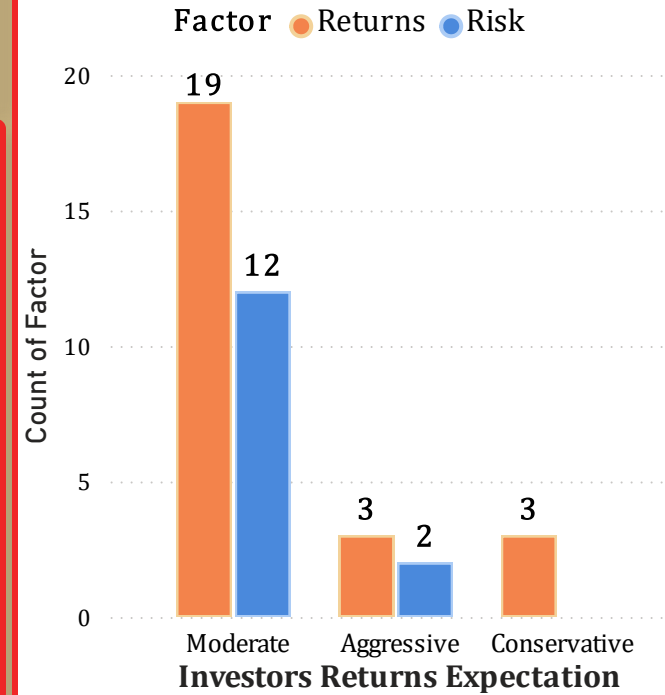
All



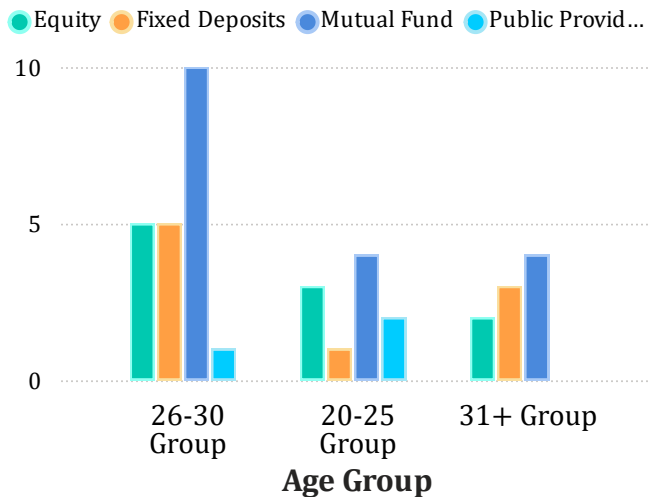
## Total Investor

40

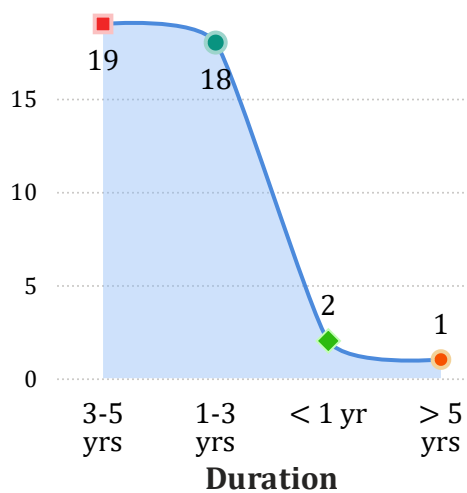
## Investment Avenues



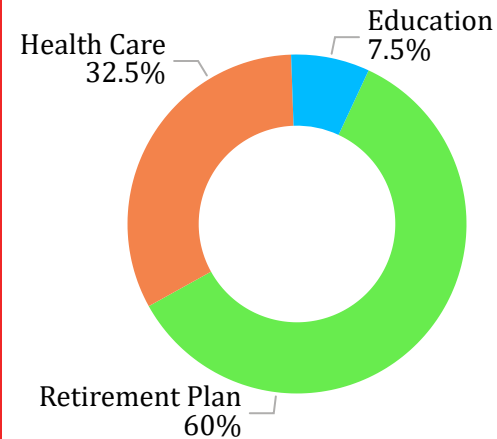
## Investment Preference by Age Group



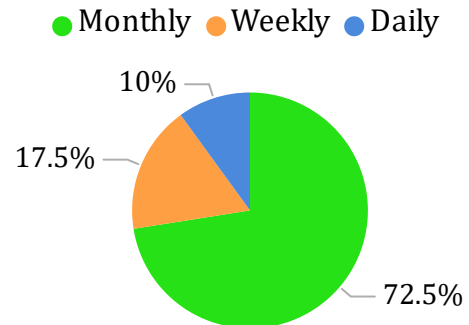
## Investment Duration



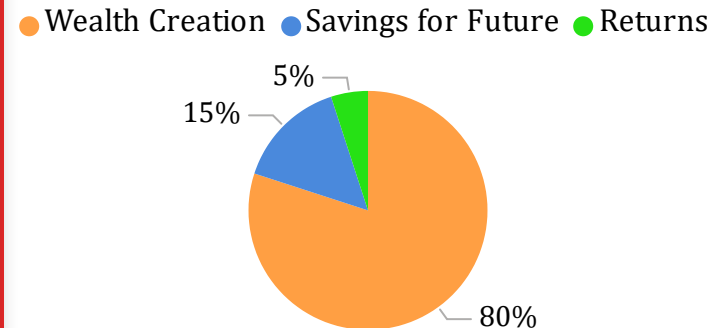
## Savings Objective



## Invest Monitor Frequency



## Purpose of Investment



## Investment Avenues

