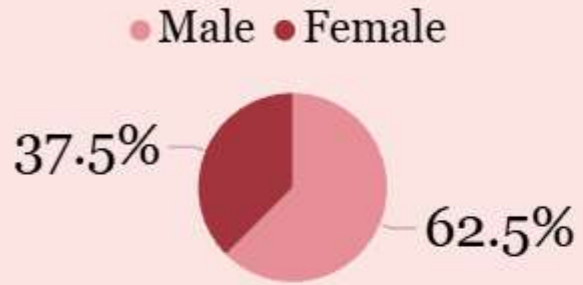
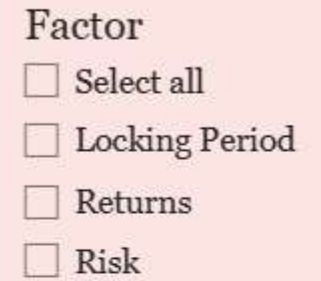


Task 1: Data Exploration and Summary

Summarizing key statistics in the dataset.



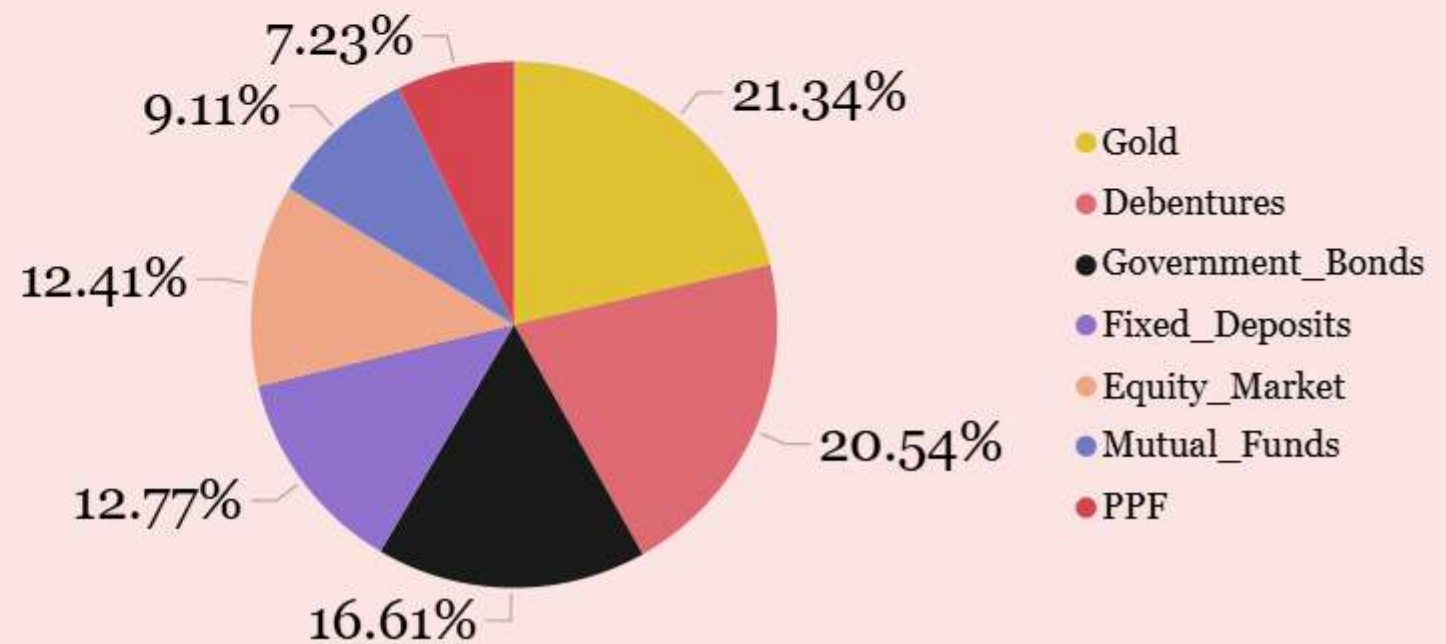
28
Average Age



Common Savings Objectives



Preferrable Investment Types



Task 2: Gender Based Analysis

Visualizing gender-based differences in investment preferences.

Invest_Monitor

- ☐ Select all
- ☐ Daily
- ☐ Monthly
- ☐ Weekly

Gender

- ☐ Select all
- ☐ Female
- ☐ Male

Debentures

Most Preferred by Males

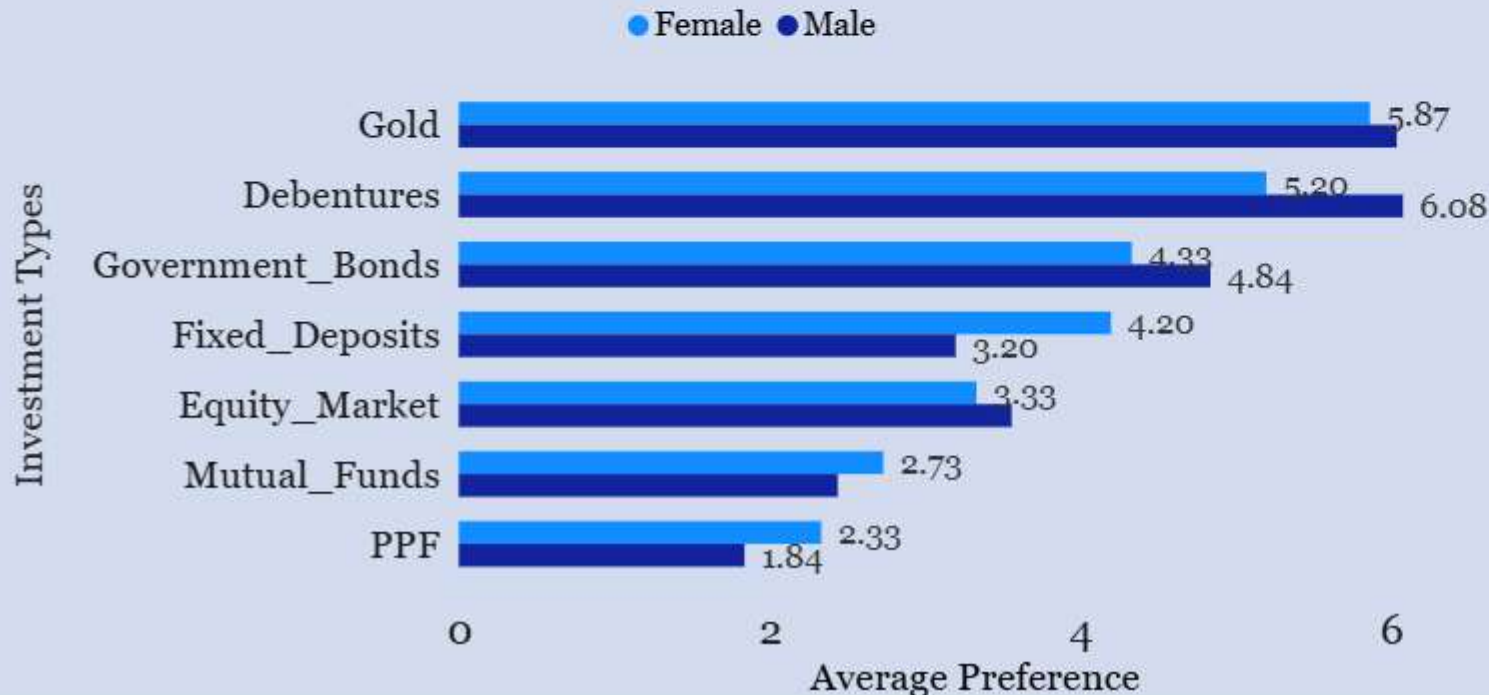
Gold

Most Preferred by Females

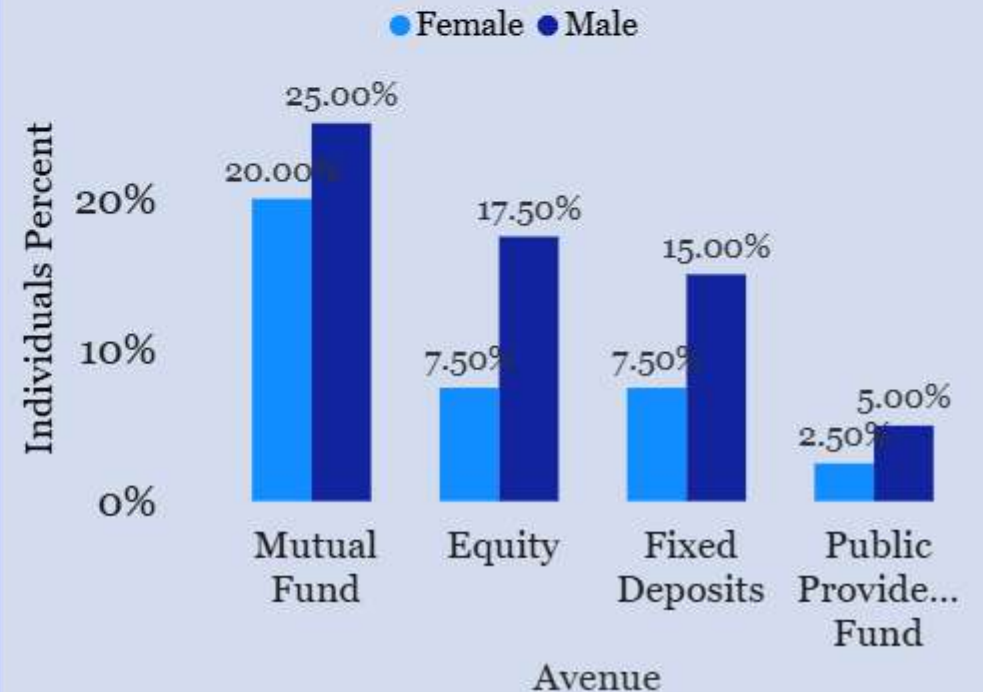
Insights

- Males show a higher preference for *Debentures*, *Government Bonds*, and *Equity* than females
- Females show higher preference for *Fixed Deposits*, *PPF*, and *Mutual Funds* than males
- Among Males *Debentures* shows the stronger interest.
- Among Females *Gold* shows the stronger interest.

Investment Preferences across Gender



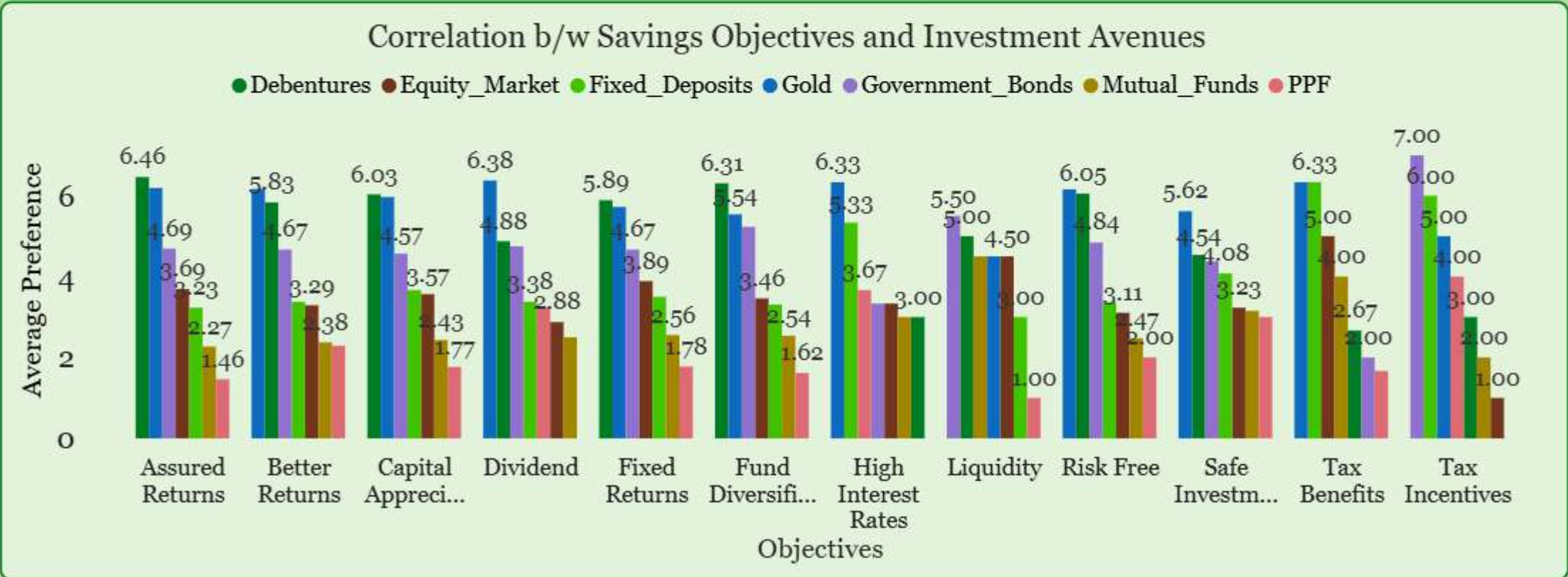
Distribution of Avenues



Task 3: Objective Analysis

Analyzing the relationship between savings objectives and investment choices.

Preferred Investment Choices for each objective >>>	Debentures Assured Returns	Debentures Capital Appreciation	Debentures Fixed Returns	Gold High Interest Rates	Government_Bonds Tax Incentives
	Debentures Fund Diversification	Gold Dividend	Fixed_Deposits Tax Benefits		Government_Bonds Liquidity



Gold
Risk Free

Gold
Safe Investment

Gold
Better Returns

Gender
☐ Female
☐ Male

Task 4: Investment Duration and Frequency Analysis

Analyzing investment durations and monitoring frequencies.

3-5 years

Most Common Duration

Gender

☐ Female

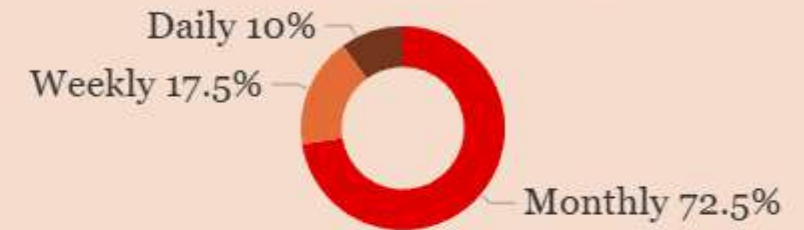
☐ Male

Monthly

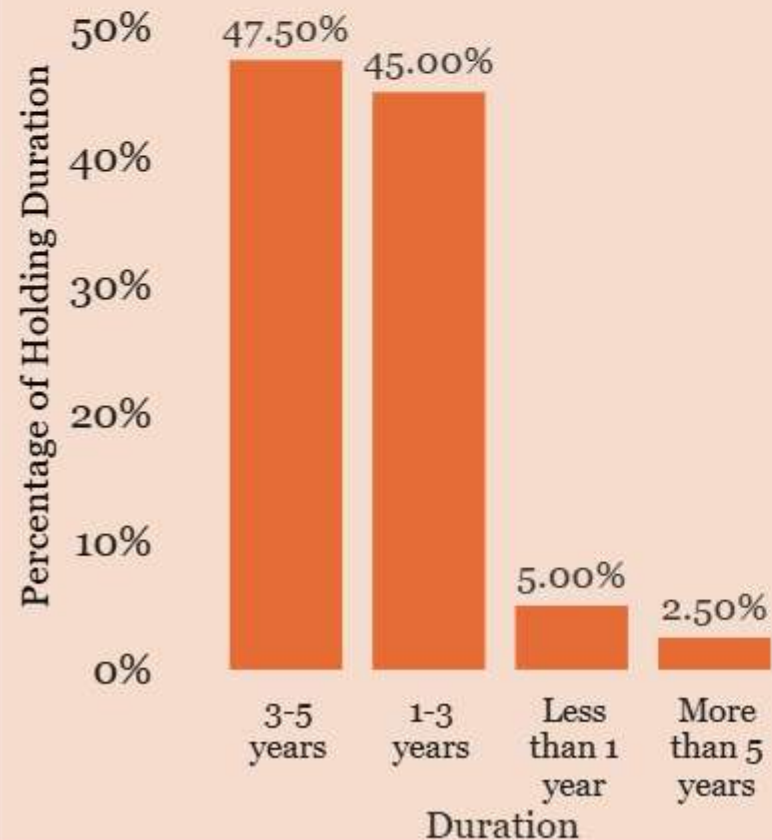
Common Freq. of Investment Monitor

Investment Monitor

● Monthly ● Weekly ● Daily

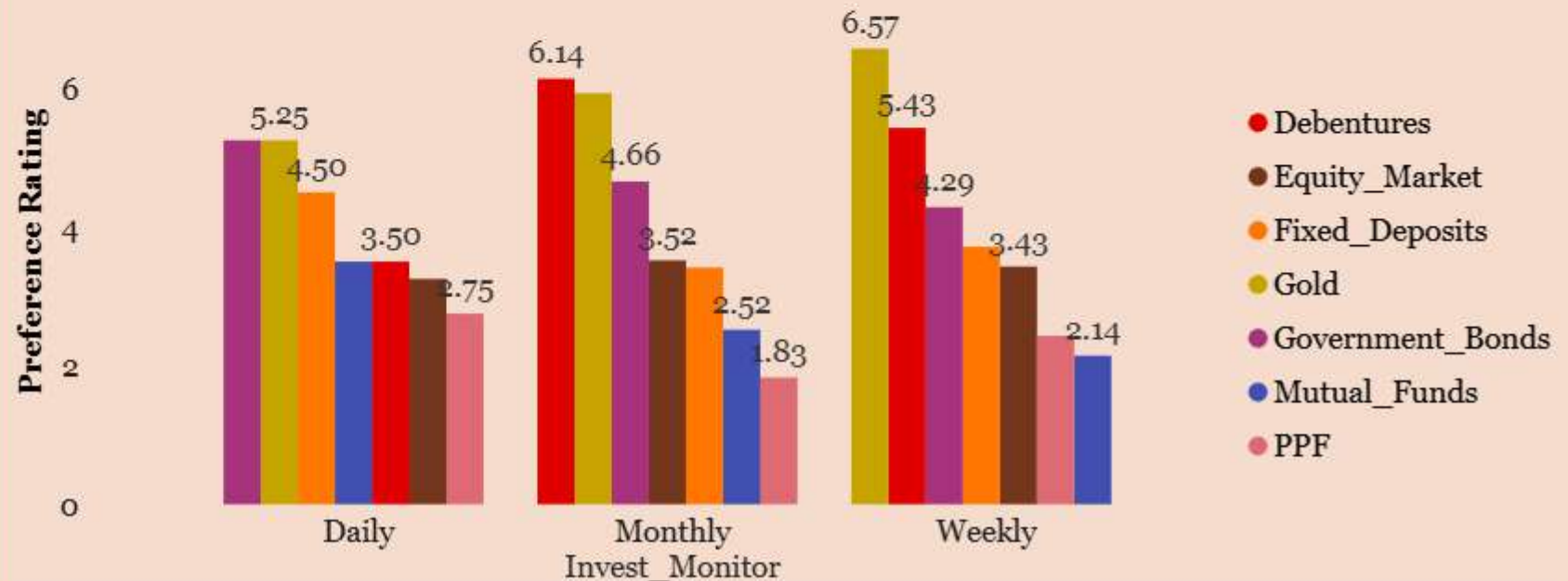


Investment Duration Distribution



People who monitor more frequently prefer Government bonds and Gold more while people with less monitoring freq. prefer Debentures.

Investment Monitor and Investment Preferences



Task 5: Investment Reason Analysis

Analyzing and visualizing the reasons for investments.

Capital Appreciation

Common Reason

People choosing bonds focus on Assured Returns, while people choosing Equity tend to focus more on Capital Appreciation. People choose FD for Risk Free Investments and Mutual Funds for Better Returns.

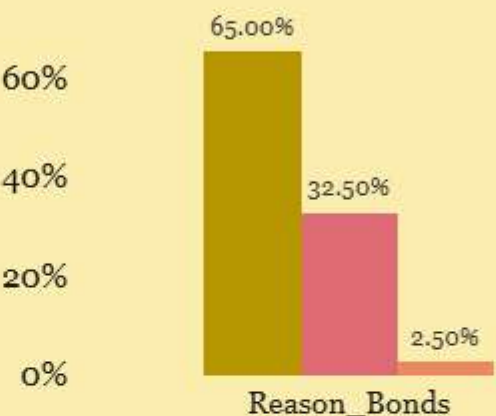
Common Trends in Investment Reasons

Reasons for Investments



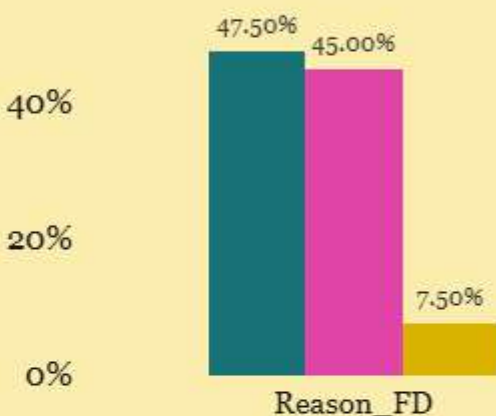
Reason Behind Bonds

Assured ... Safe Inv... Tax Ince...



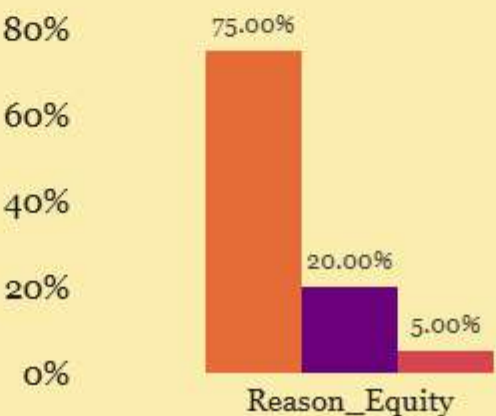
Reason Behind Fixed Deposits

Fixed Ret... High Int... Risk Free



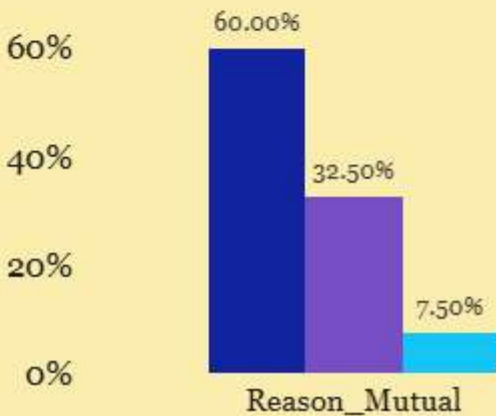
Reason Behind Equity

Capital Appr... Dividend Liquidity



Reason Behind Mutual Funds

Better Ret... Fund Di... Tax Be...



Task 6: Source of Information Analysis

Analyzing the sources from which individuals gather investment information.

Financial Consultants

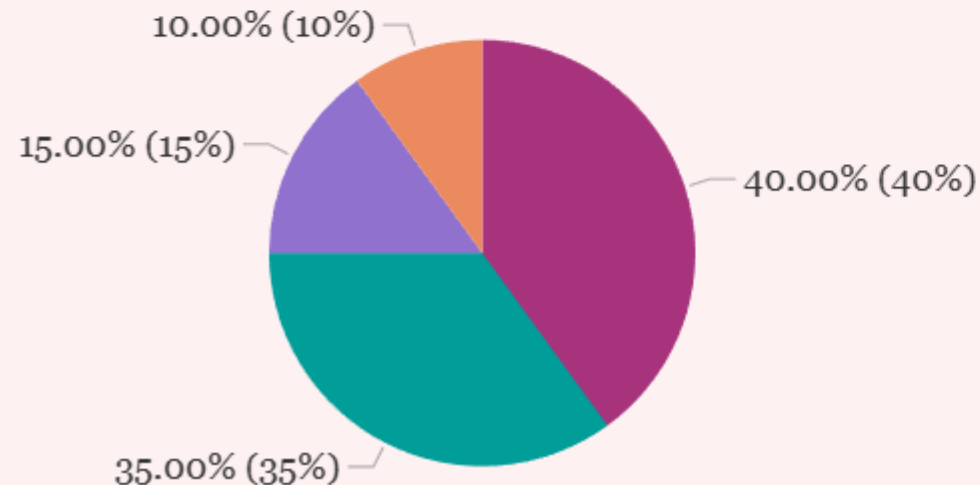
Common Source on which investors rely upon

- People choose Financial consultants as the most reliable source of information indicating a strong trust upon authorized consultants.
- People use internet less frequently as their primary source of information indicating more chances of misleading information.
- Newspapers are still used as reliable information source among the investors.

- According to the insights females tend to use more internet as compared to males as their information source.
- There is a huge difference between the percentages of television as the information source indicating that females are more drawn towards internet rather than television.

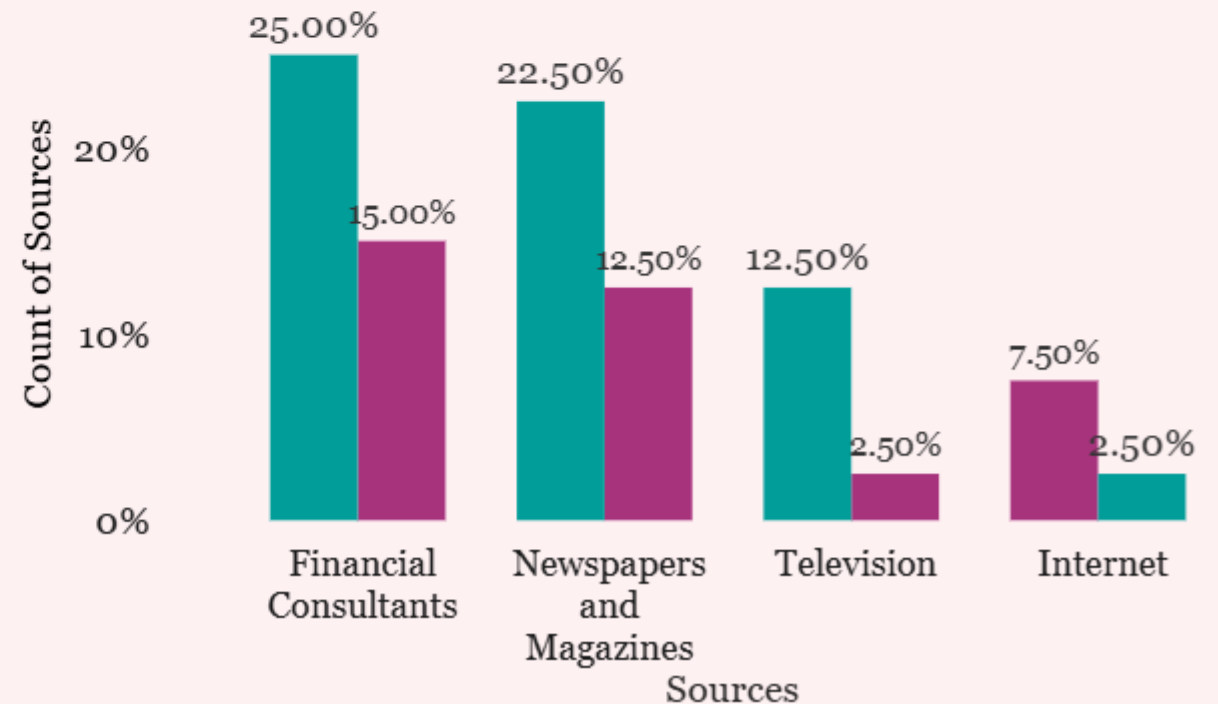
Common Information Sources

● Financial Consultants ● Newspapers and Magazines ● Television ● Internet



Sources Distribution Across Gender

● Female ● Male



Task 7: Combining Insights into a Dashboard

Comprehensive dashboard incorporating all insights.

User Profile & Overview

Invest_Monitor

All

Gender

All

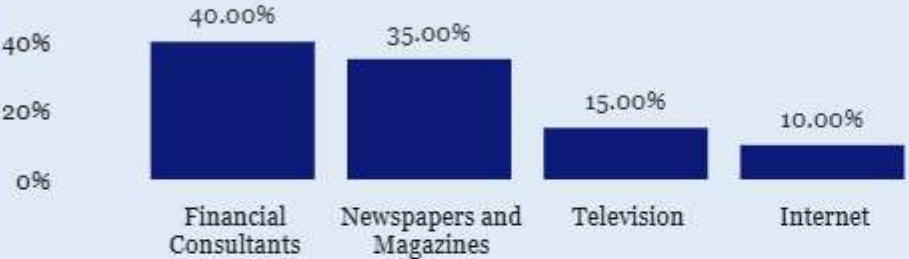
Key Insights

- Among Males *Debentures* shows the stronger interest.
- Among Females *Gold* shows the stronger interest.
- People choose *Financial consultants* as the most reliable source of information indicating a strong trust upon authorized consultants.
- People use internet less frequently as their primary source.
- Newspapers are still used as reliable information source among the investors.
- Most common savings objective is *Retirement Plan*
- People tend to monitor their investments *monthly*.

Financial Consultants

Common Source on which investors rely upon

Common Information Sources



Debentures

Most Preferred by Males

Gold

Most Preferred by Females

Male Female



Yes No



Capital Appreciation

Common Reason

3-5 years

Common Duration

Retirement Plan

Common Saving Objective

Monthly

Common Freq. of Investment Monitor

28

Average Age

Preferred Investment Choices for each objective
>>>

Debentures

Assured Returns

Debentures

Capital Appreciation

Debentures

Fixed Returns

Government_Bonds

Tax Incentives

Gold

Better Returns

Gold

Risk Free

Debentures

Fund Diversification

Gold

Dividend

Fixed_Deposits

Tax Benefits

Gold

High Interest Rates

Government_Bonds

Liquidity

Gold

Safe Investment

Investment Behavior

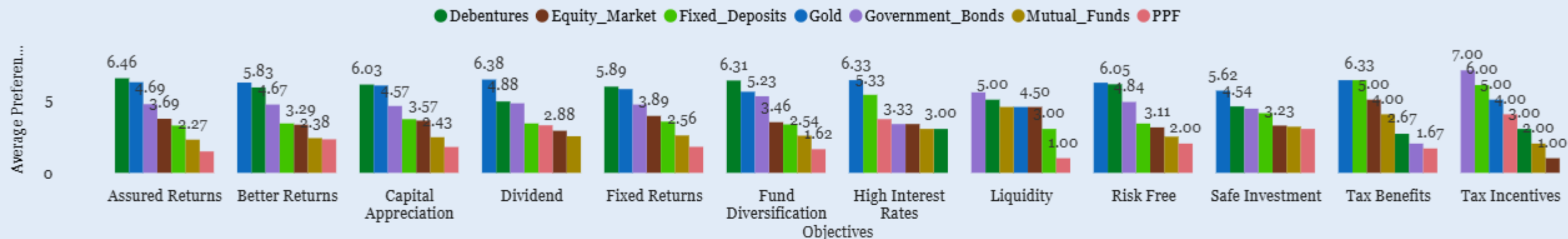
Invest_Monitor

All

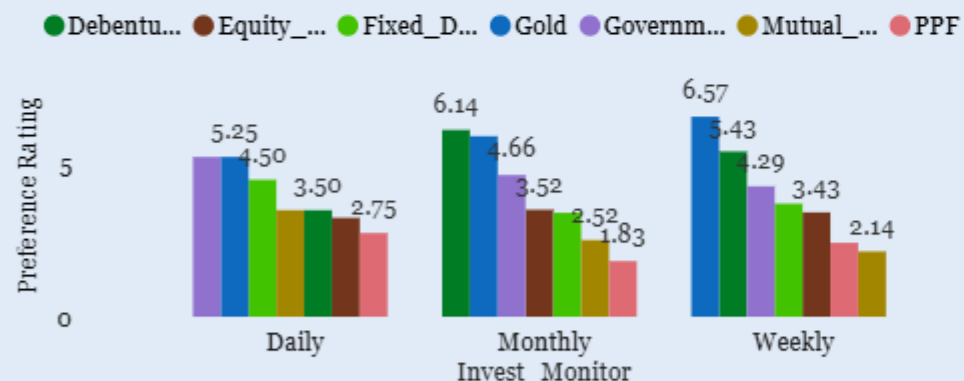
Gender

All

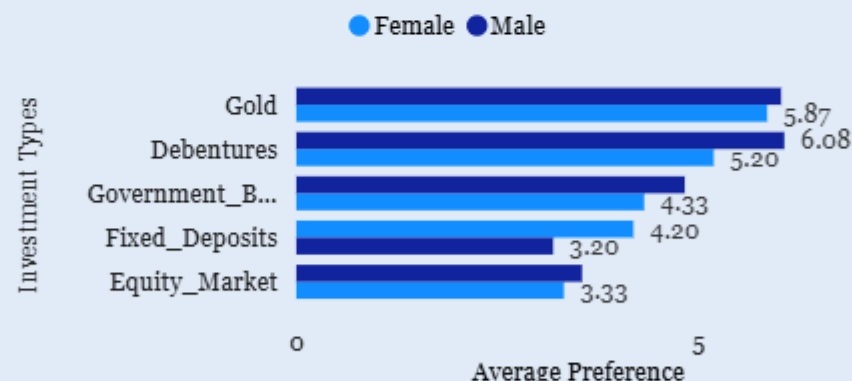
Correlation b/w Savings Objectives and Investment Avenues



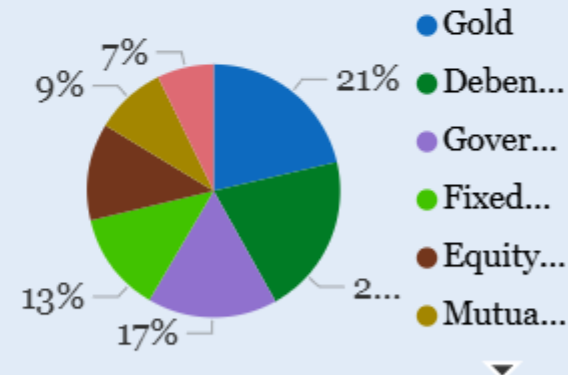
Investment Monitor and Investment Preferences



Investment Preferences across Gender



Preferrable Investment Types



Key Insights

- Males show a higher preference for *Debentures*, *Government Bonds*, and *Equity* than females
- Females show higher preference for *Fixed Deposits*, *PPF*, and *Mutual Funds* than males
- People who monitor more frequently prefer Government bonds and Gold more while people with less monitoring freq. prefer Debentures.



Investment Reasons

Invest_Monitor



All



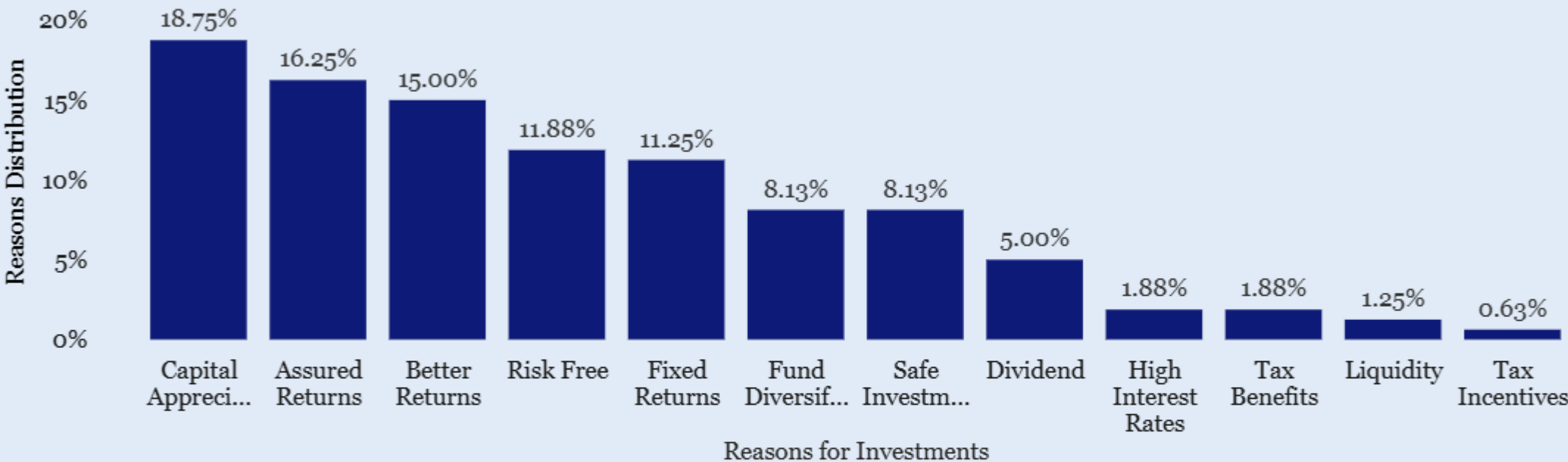
Gender



All



Common Trends in Investment Reasons

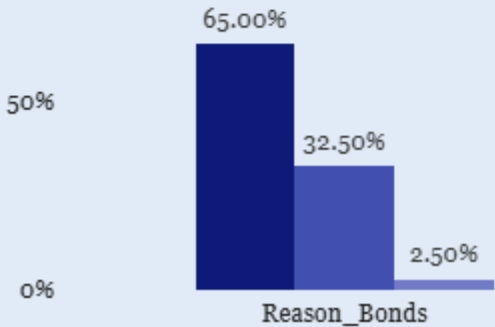


Key Insights

- People choosing bonds focus on Assured Returns, while people choosing Equity tend to focus more on Capital Appreciation. People choose FD for Risk Free Investments and Mutual Funds for Better Returns.

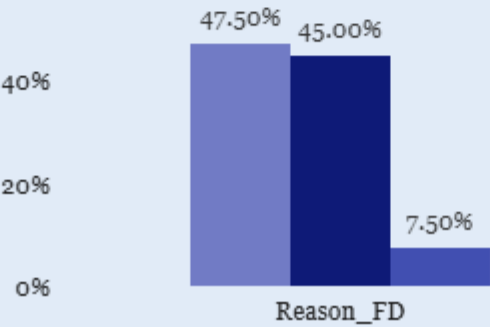
Reason Behind Bonds

Assured Returns Safe Investments Tax Incentives



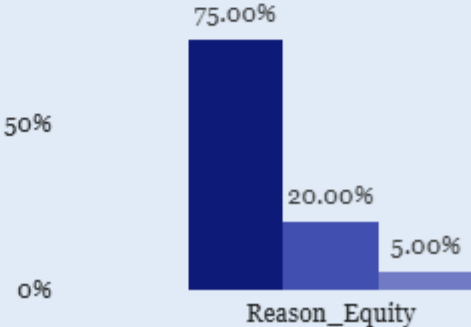
Reason Behind Fixed Deposits

Fixed Returns High Interest Rates Risk Free



Reason Behind Equity

Capital Appreciation Dividend Liquidity



Reason Behind Mutual Funds

Better Returns Fund Diversification Tax Benefits

