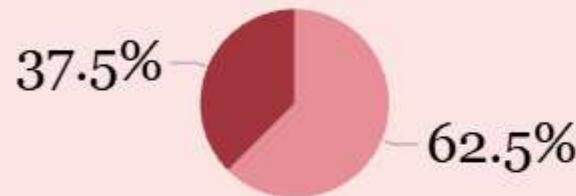


# Task 1: Data Exploration and Summary

Summarizing key statistics in the dataset.

● Male ● Female



**28**  
Average Age

Invest\_Monitor

- Select all
- Daily
- Monthly
- Weekly

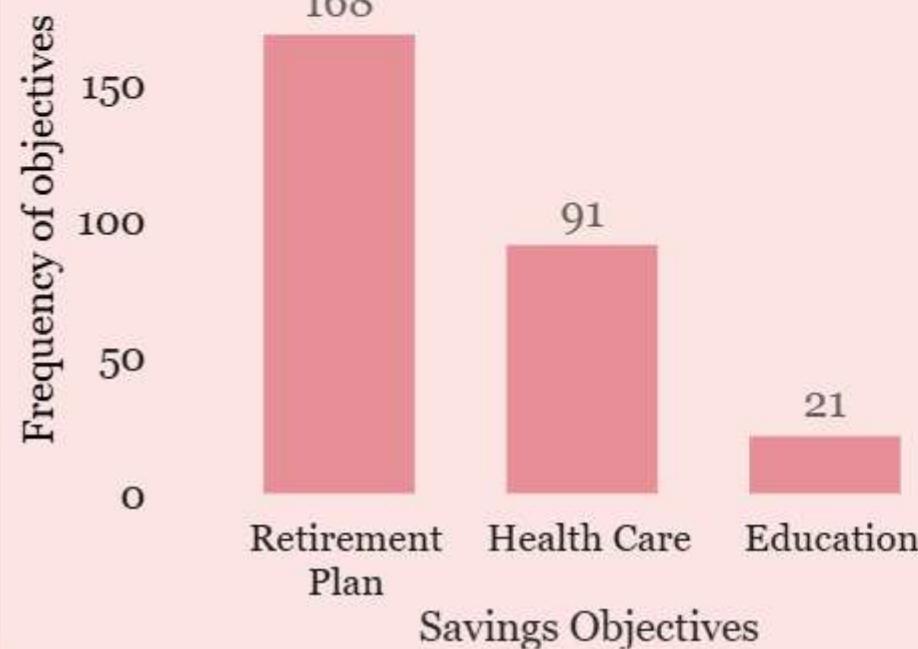
Gender

- Select all
- Female
- Male

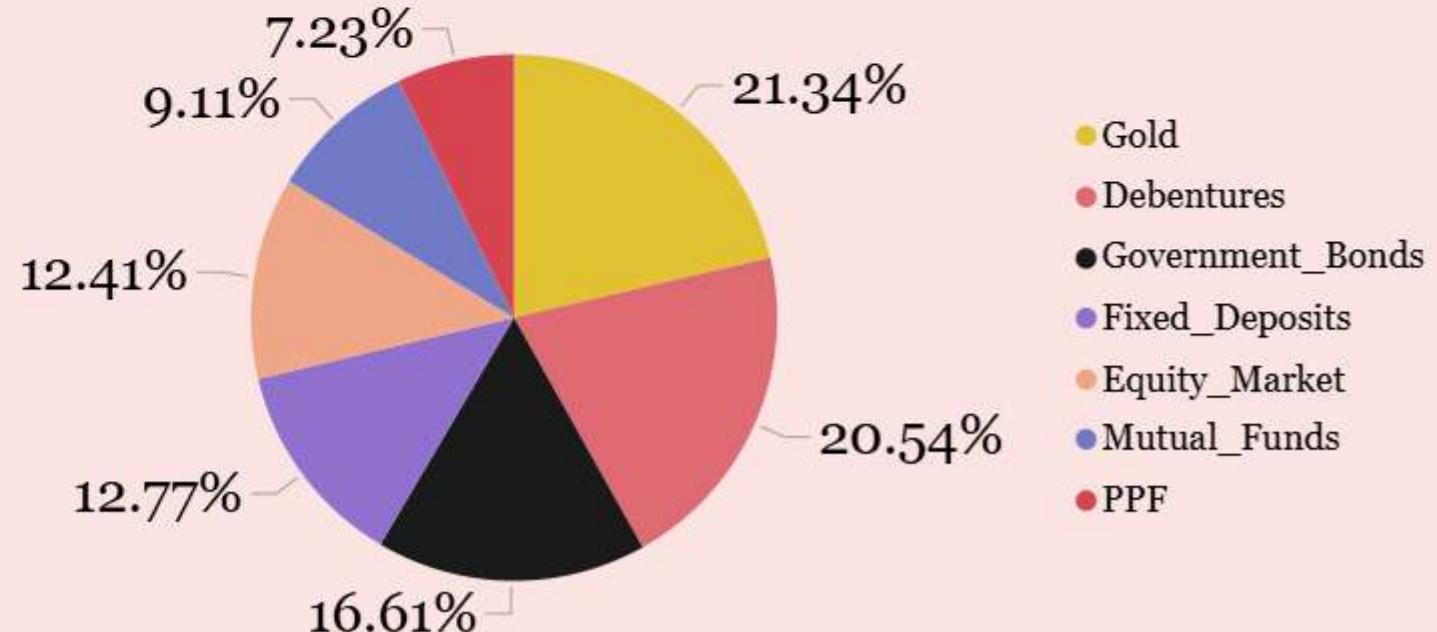
Factor

- Select all
- Locking Period
- Returns
- Risk

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

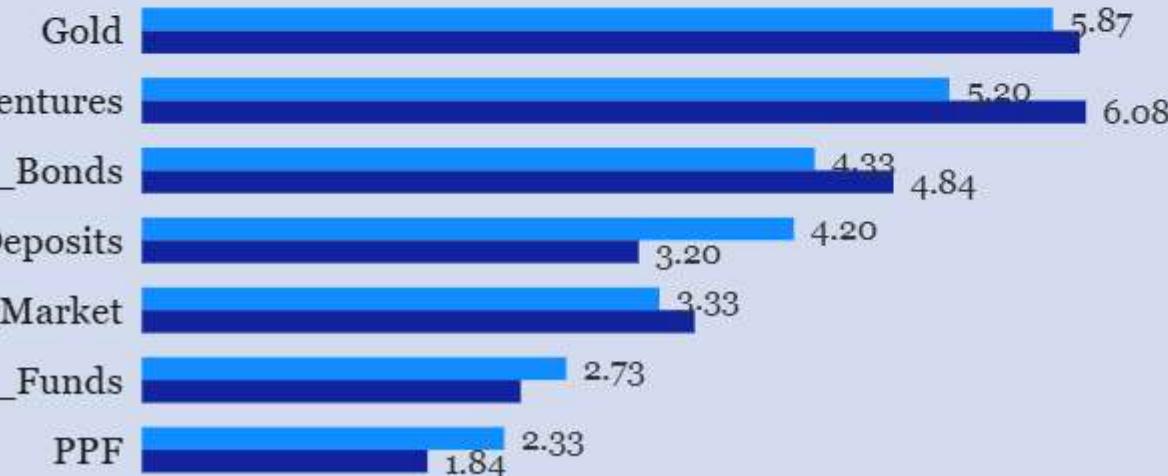
Insights

- 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

Investment Types

● Female ● Male

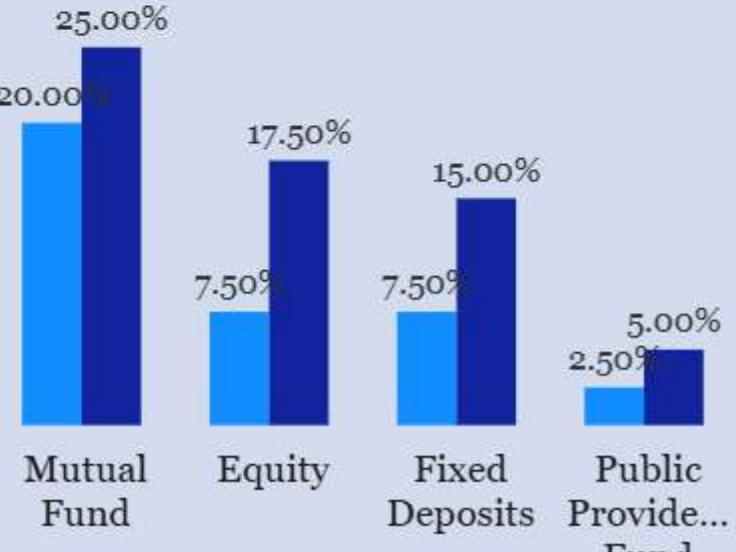


Average Preference

Distribution of Avenues

Individuals Percent

● Female ● Male



Avenue

# 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

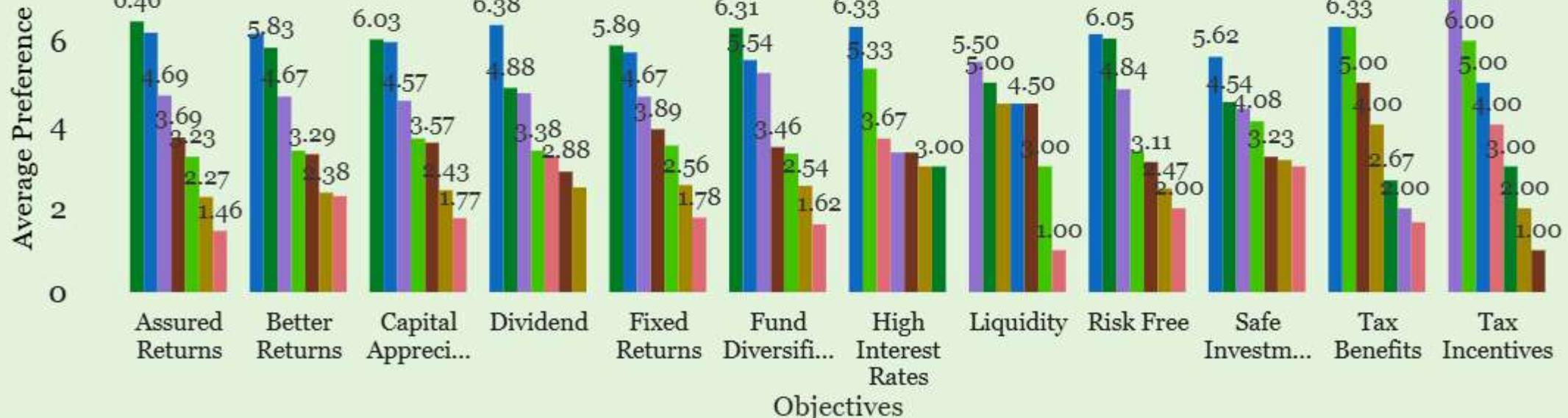
Gold  
Dividend

Fixed\_Deposits  
Tax Benefits

Government\_Bonds  
Liquidity

Correlation b/w Savings Objectives and Investment Avenues

● Debentures ● Equity\_Market ● Fixed\_Deposits ● Gold ● Government\_Bonds ● Mutual\_Funds ● PPF



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

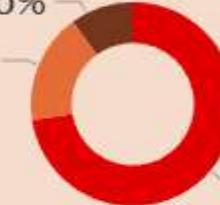
Common Freq. of Investment Monitor

Investment Monitor

● Monthly ● Weekly ● Daily

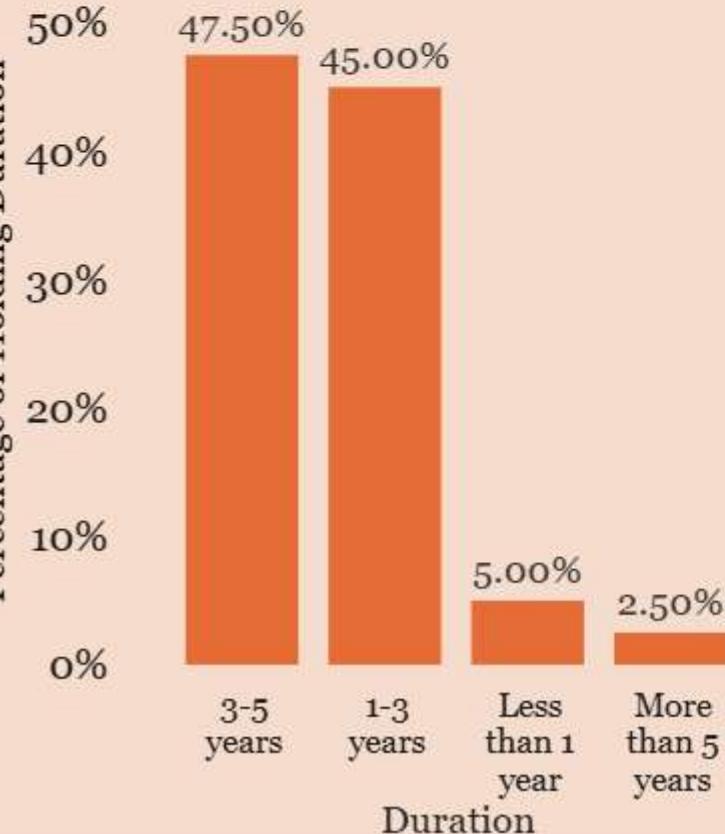
Daily 10%

Weekly 17.5%

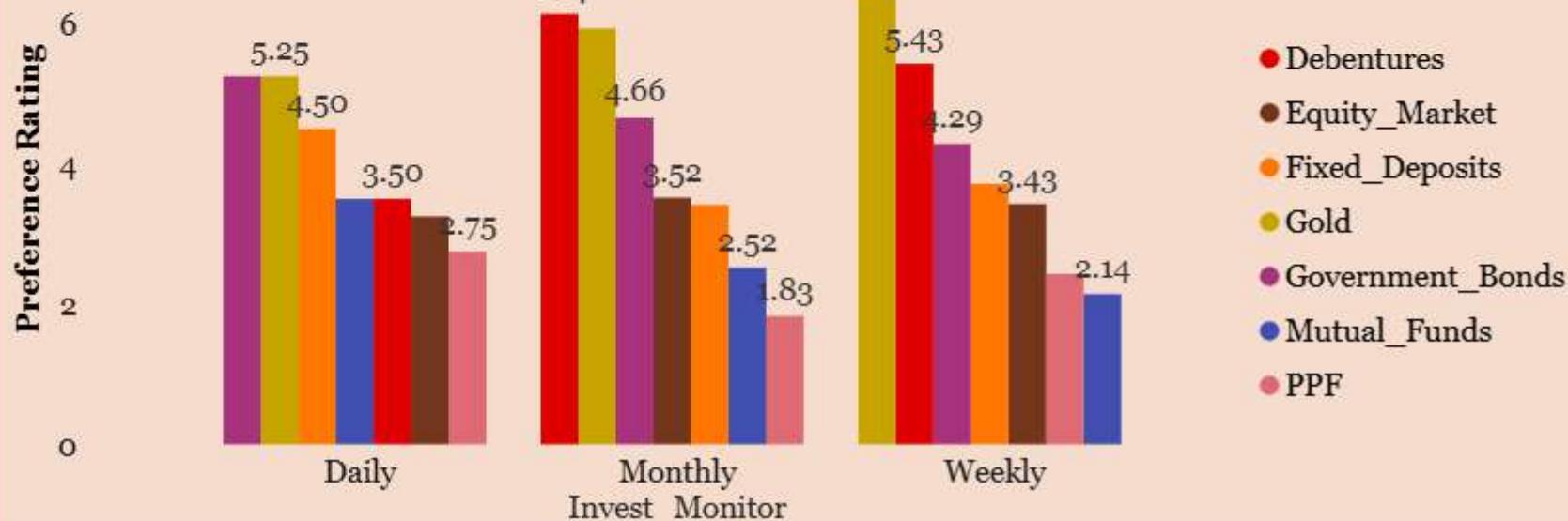


Monthly 72.5%

Investment Duration Distribution



Investment Monitor and Investment Preferences



- Debentures
- Equity\_Market
- Fixed\_Deposits
- Gold
- Government\_Bonds
- Mutual\_Funds
- PPF

# 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.

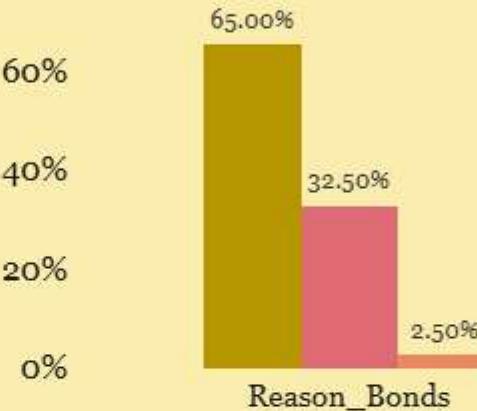
Reasons for Investments

## Common Trends in Investment Reasons



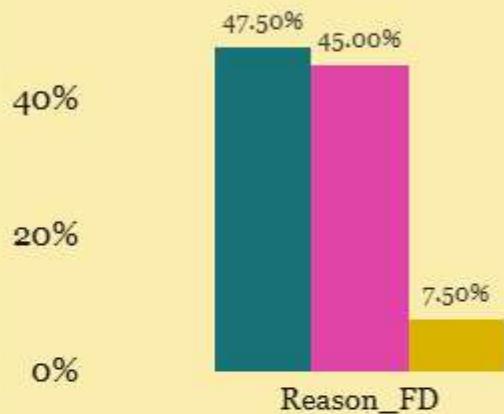
## Reason Behind Bonds

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



## Reason Behind Fixed Deposits

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



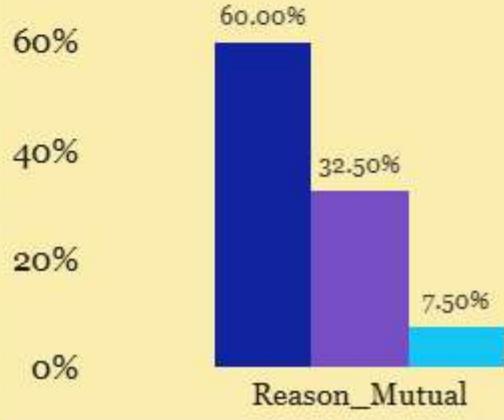
## Reason Behind Equity

● Capital Appr... ● Dividend ● Liquidity



## Reason Behind MutualFunds

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



# Task 6: Source of Information Analysis

Analyzing the sources from which individuals gather investment information.

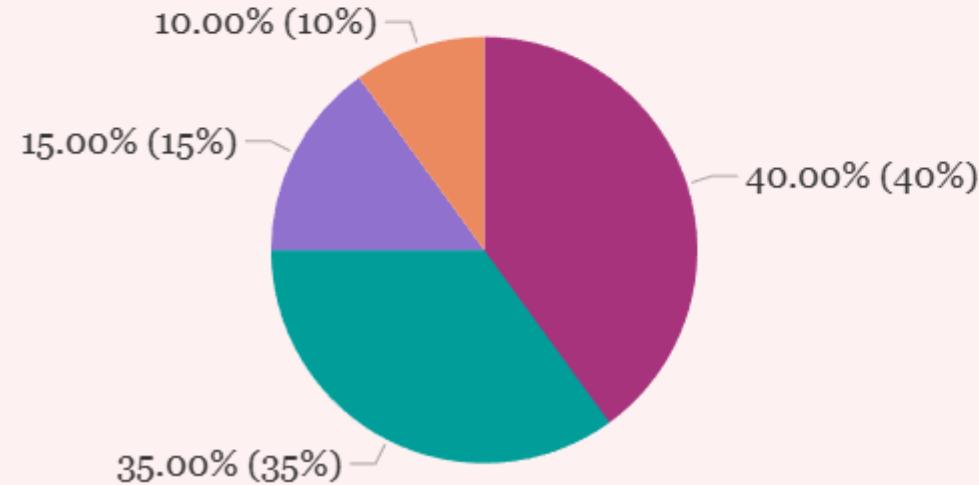
## Financial Consultants

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.

## Common Information Sources

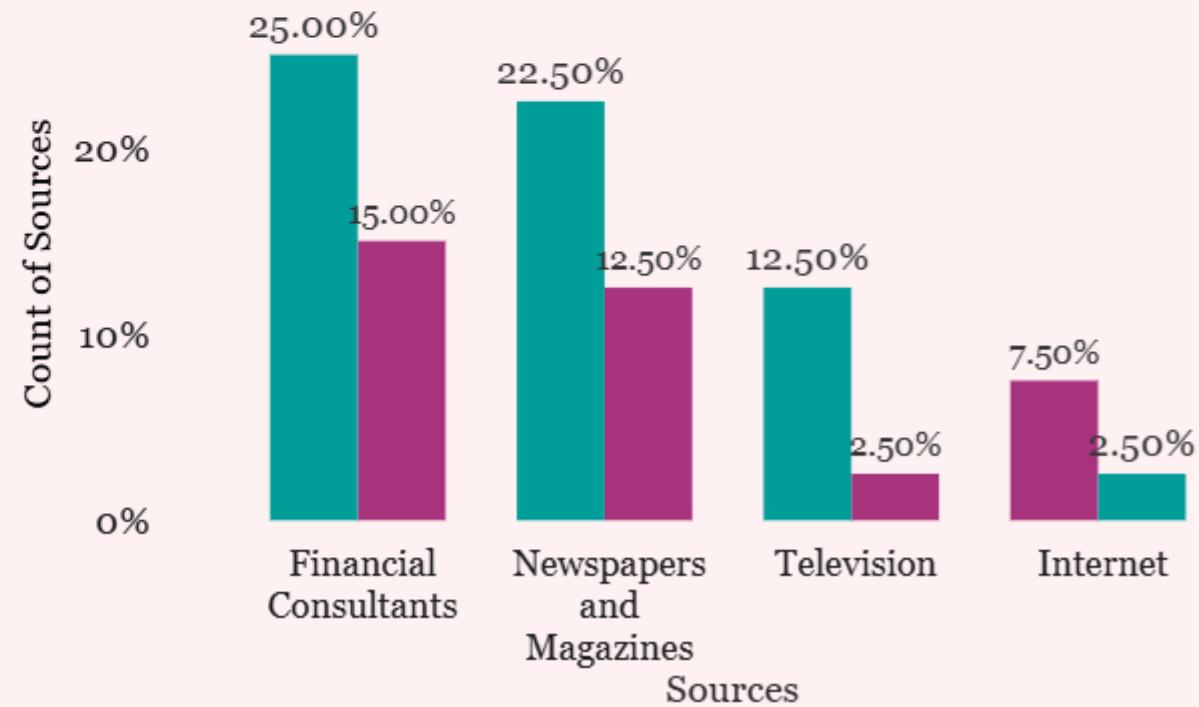
● Financial Consultants ● Newspapers and Magazines ● Television ● Internet



- 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.

## 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

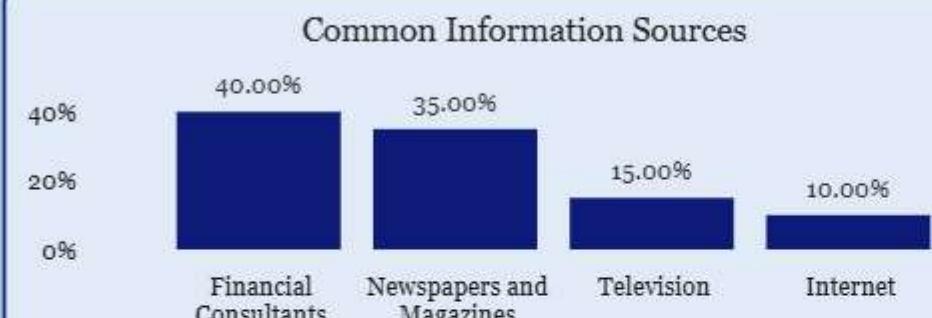
All

## 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



## Capital Appreciation Common Reason

Debentures  
Most Preferred by Males

Gold  
Most Preferred by Females

3-5 years  
Common Duration

Retirement Plan  
Common Saving Objective

Male Female



Yes No



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

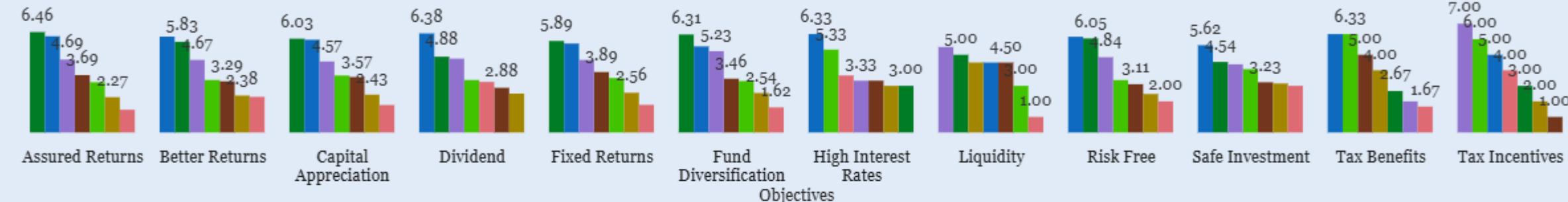
All

Gender

All

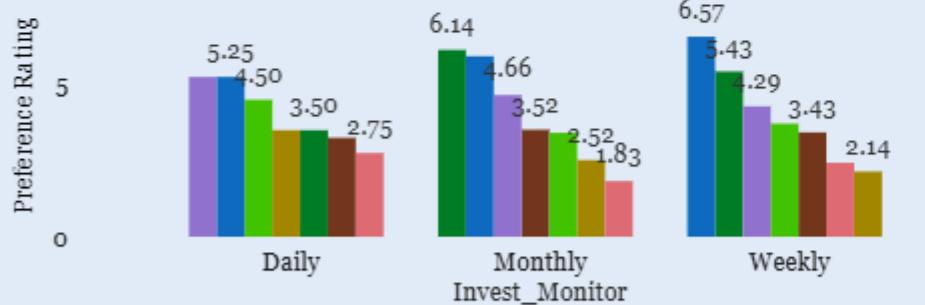
## Correlation b/w Savings Objectives and Investment Avenues

● Debentures ● Equity\_Market ● Fixed\_Deposits ● Gold ● Government\_Bonds ● Mutual\_Funds ● PPF

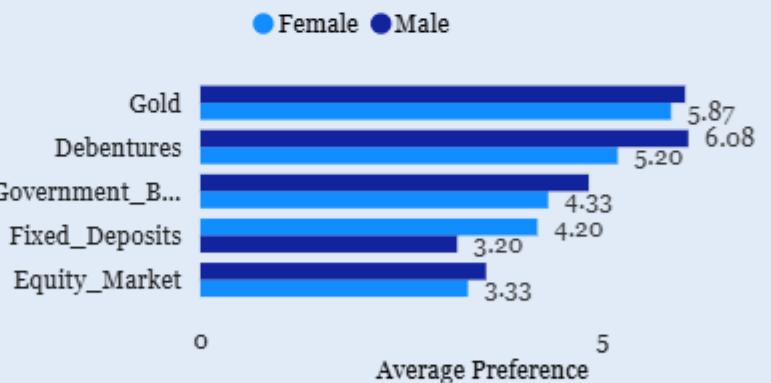


## Investment Monitor and Investment Preferences

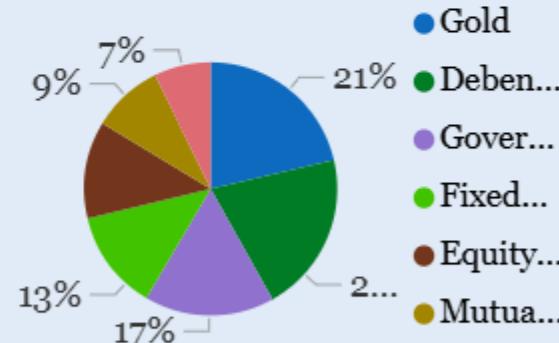
● Debentures ● Equity\_Market ● Fixed\_Deposits ● Gold ● Government\_Bonds ● Mutual\_Funds ● PPF



## 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

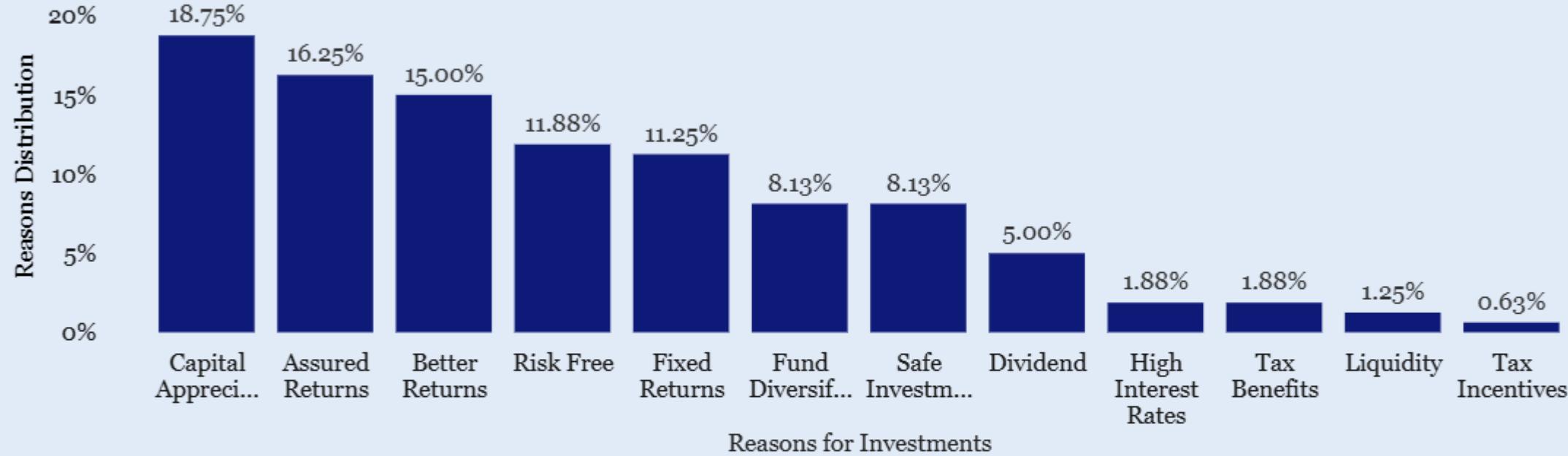
Invest\_Monitor

All

Gender

All

Common Trends in Investment Reasons

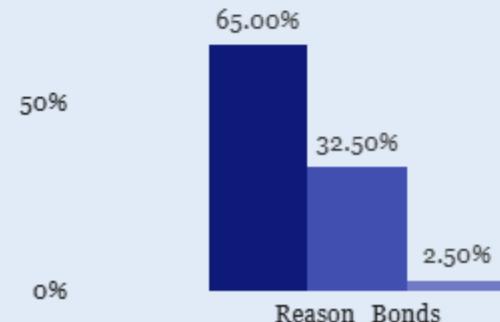


## Key Insights

- 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.

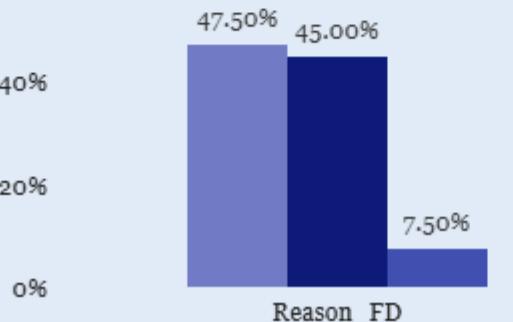
### Reason Behind Bonds

● Assured Returns ● Safe Investments ● Tax Incentives



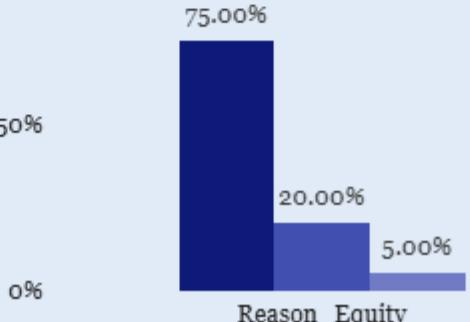
### Reason Behind Fixed Deposits

● Fixed Returns ● High Interest Rates ● Risk Free



### Reason Behind Equity

● Capital Appreciation ● Dividend ● Liquidity



### Reason Behind MutualFunds

● Better Returns ● Fund Diversification ● Tax Benefits

