



SHIELD INSURANCE ANALYSIS

Presented By:
Praveer Tiwari

Introduction

Shield Insurance was founded with a vision to provide comprehensive and innovative insurance solutions to individuals, families and businesses. Over the years, the company has built a reputation for excellence, trust, and unwavering commitment to the customers.

Objective

Shield Insurance wants to evaluate how the company is performing in terms of sales and revenue.

This presentation aims to provide valuable insights to the management of Shield Insurance so they can make informed data-driven decisions on key areas and take the company to new heights.

This presentation will consist of the following views:

- General View – Analysed the key metrics, trends, and categorization by age and city. Along with total revenue and customers.
- Sales Mode View – Analysed the customer and revenue split percentages by overall sales method. Also trend view by months.
- Age Group View – Analysed the age group breakdown and policy preference of all customers.

Insights of General View:

Revenue & Customer Split By City

City	Total Customers	Total Revenue
Delhi NCR	11007	401.57M
Mumbai	6432	239.51M
Hyderabad	4340	160.52M
Chennai	2966	106.31M
Indore	2096	81.35M
Total	26841	989.25M

Split By Age Group

Age Group	Total Customers	Total Revenue
31-40	10977	335.72M
41-50	5357	210.60M
65+	2069	193.77M
51-65	2792	156.92M
25-30	3407	61.50M
18-24	2239	30.74M
Total	26841	989.25M

Month Wise Trend By Revenue



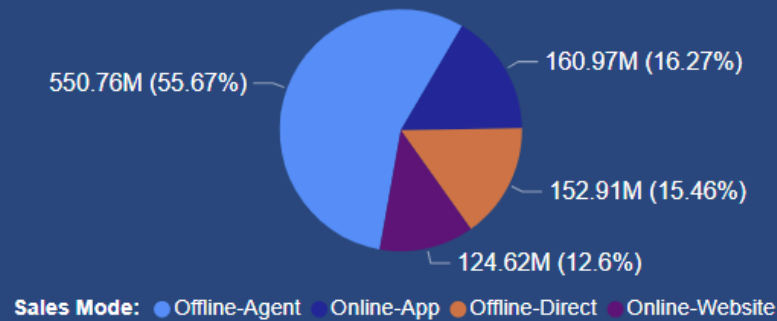
Month Wise Trend By Customers



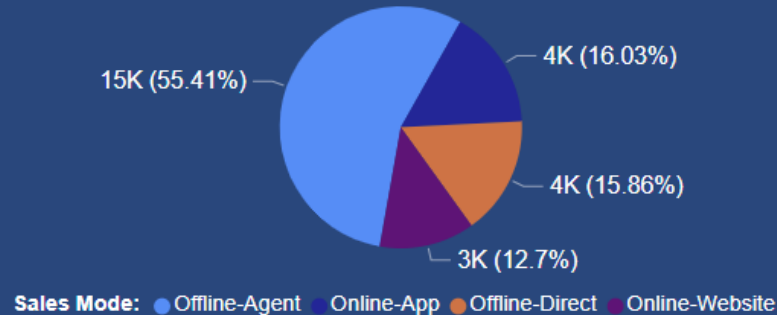
- City of Delhi NCR contributes highest towards revenue and customers.
- Age Group 31-40 contributes highest towards revenue and customers.
- March 2023 has seen a massive rise in revenue and customer count.
- April 2023 has seen a tremendous drop in revenue and customer count.

Insights of Sales View:

Total Revenue By Sales Mode



Total Customers By Sales Mode



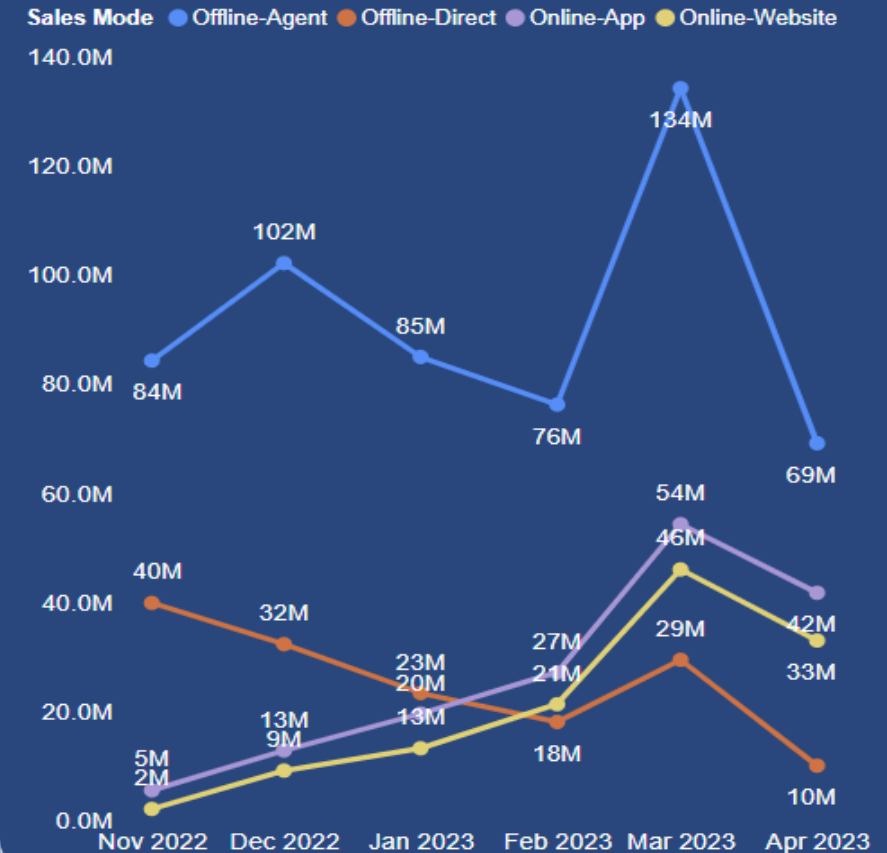
Total Revenue

989.3M

Total Customers

26.8K

Total Revenue by Year, Quarter and Month



- Total revenue generated is 983.3 Million Rupees.
- Total customer count stands at 26.8 Thousand.
- Offline-Agent mode has the highest contribution which is greater than 50% to the overall revenue and customer count.
- Offline-Direct mode has seen a steady decline in terms of revenue and customers compared to other sales modes.

Insights of Age Group View:

<u>Age Group Vs Policy Preference</u>	
Policy Id	Total Customers
⊕ POL4321HEL	4434
⊕ POL3309HEL	3829
⊕ POL4331HEL	3735
⊕ POL5319HEL	3329
⊕ POL6303HEL	3017
⊕ POL6093HEL	2543
⊕ POL9221HEL	2318
⊖ POL2005HEL	1068

<u>Age Group Vs Expected Settlements</u>	
Age Group	Sum of Estimates
18-24	42.50M
25-30	89.80M
31-40	516.77M
41-50	338.33M
51-65	259.27M
65+	331.77M
Total	1,578.45M

- The policy ID “POL4321HEL” has a customer base of 4,434.
- Age Group 31-40 hold the highest number of policies.
- Amount settled is seen highest among the age group 31-40.

Thank You