Simplified example of a dataset for a client portfolio with multiple investments:

| **Client ID** | **Client Name** | **Investment Type** | **Investment Name** | **Investment Amount** | **Investment Date** |
| --- | --- | --- | --- | --- | --- |
| 001 | John Doe | Stocks | Apple Inc | $10,000 | 2023-05-10 |
| 001 | John Doe | Mutual Funds | Vanguard 500 | $15,000 | 2023-06-15 |
| 001 | John Doe | Bonds | US Treasury | $20,000 | 2023-07-20 |
| 001 | John Doe | Real Estate | Beach House | $200,000 | 2023-08-25 |
| 001 | John Doe | Stocks | Microsoft Corp | $12,000 | 2023-09-30 |
| 001 | John Doe | Mutual Funds | Fidelity Magellan | $18,000 | 2023-10-05 |
| 001 | John Doe | Bonds | Corporate Bonds | $25,000 | 2023-11-10 |
| 001 | John Doe | Real Estate | Apartment Complex | $300,000 | 2023-12-15 |

This dataset includes:

* **Client ID**: A unique identifier for each client.
* **Client Name**: Name of the client.
* **Investment Type**: Type of investment (e.g., Stocks, Mutual Funds, Bonds, Real Estate).
* **Investment Name**: Name of the specific investment (e.g., Apple Inc, Vanguard 500).
* **Investment Amount**: Amount invested in the investment.
* **Investment Date**: Date when the investment was made.

You can use this dataset to create various visualizations and metrics in Power BI to analyze the client's portfolio performance, distribution across different investment types, historical trends, etc.

**Creating a Power BI dashboard involves several steps. Here's a step-by-step procedure along with an outline of the dashboard:**

**Step 1: Import Data**

1. Open Power BI Desktop.
2. Click on "Get Data" and choose the appropriate data source (e.g., Excel, CSV, database).
3. Select your dataset file and import it into Power BI.

**Step 2: Data Transformation and Modelling**

1. In the "Data" view, review your dataset columns.
2. Perform any necessary data cleaning and transformation (e.g., changing data types, renaming columns).
3. Create relationships between tables if your dataset consists of multiple tables (not applicable in this case as it's a single table dataset).

**Step 3: Create Visualizations**

1. Switch to the "Report" view.
2. Drag and drop fields from your dataset onto the canvas to create visualizations.
3. Here's an outline of the dashboard and some potential visualizations:

Outline of Dashboard:

* **Overview Section:**
  + Total Investment Value Card: Sum of Investment Amount.
  + Number of Investments Card: Count of distinct investments.
  + Investment Type Distribution Pie Chart: Distribution of investments by type.
* **Investment Performance Section:**
  + Investment Amount Over Time Line Chart: Trend of total investment amount over time.
  + Investment Type Comparison Bar Chart: Comparison of total investment amounts by type.
  + Top 5 Investments Table: List of top 5 investments by amount.
* **Investment Details Section:**
  + Interactive Table: Detailed view of all investments including client name, investment type, investment name, amount, and date.

**Step 4: Apply Formatting and Layout**

1. Format visualizations to improve readability (e.g., adjust colors, fonts).
2. Arrange visualizations on the canvas to create a visually appealing layout.
3. Add titles, text boxes, and images to provide context and guidance to users.

**Step 5: Add Interactivity (Optional)**

1. Add slicers, filters, and drill-down functionality to make the dashboard interactive.
2. Create bookmarks and buttons to navigate between different views or pages within the dashboard.

**Step 6: Review and Publish**

1. Review the dashboard to ensure all visualizations are accurate and meaningful.
2. Click on "File" > "Save" to save the Power BI file.
3. Click on "File" > "Publish" to publish the dashboard to Power BI Service for sharing with others.

By following these steps, you can create a comprehensive Power BI dashboard for the given dataset, allowing you to analyse and visualize the client's portfolio effectively.

This visualization represents the layout of the Power BI dashboard:

* **Overview Section:** Contains summary cards for total investment value and number of investments, along with a pie chart showing the distribution of investments by type.
* **Investment Performance Section:** Displays line and bar charts showing the trend of investment amounts over time and a comparison of investment types, respectively.
* **Investment Details Section:** Includes an interactive table providing detailed information about all investments.

This layout provides a clear structure for the dashboard, making it easy for users to navigate and understand the client's portfolio data.