



# Shield Insurance Analysis

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This Power BI dashboard presents an analytical overview of Shield insurance company's key business metrics, with a focus on customer behavior, policy performance, and revenue trends. Using data sourced from policy transactions, customer profiles, and revenue records, the report aims to uncover actionable insights that support data-driven decision-making in areas such as customer acquisition, policy optimization, and financial planning.

Key highlights include segmentation of active customers, revenue distribution across age groups and places, policy growth over time and profits through different Sales modes.



**Revenue &  
Customer Trends**



**Sales Mode  
Analysis**



**Age Group  
Analysis**



## Revenue & Customer Trends



### Customers

3.79K✓

LM: (Blank) (+Infinity%)  
Nov\_22

### Revenue

131.69M✓

LM: (Blank) (+Infinity%)  
Nov\_22

### DCG

126.23✓

LM: (Blank) (+Infinity%)  
Nov\_22

### DRG

4.39M✓

LM: (Blank) (+Infinity%)  
Nov\_22

... filters

Customers

Revenue

Sales Mode

All

Age Group

All

City

All

Month

All

Policy ID

All

LM: Last Month

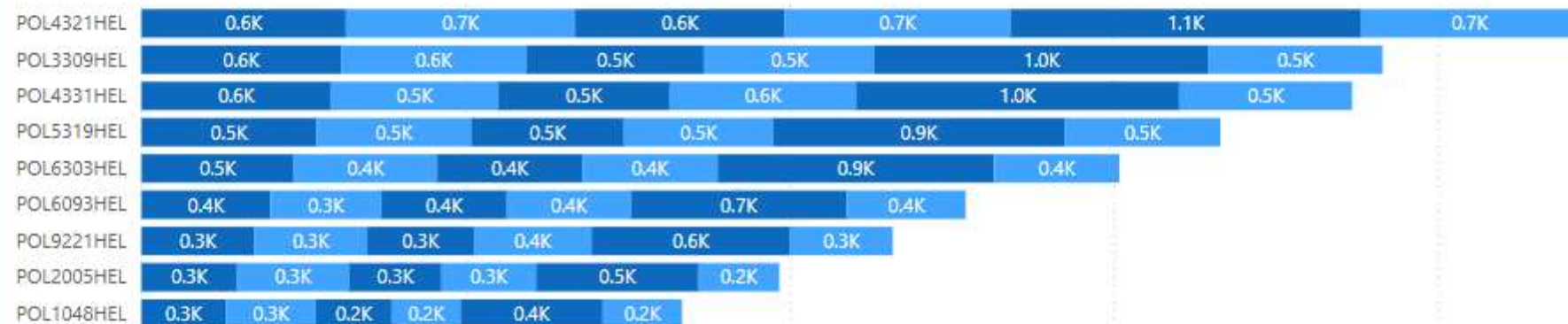
DCG: Daily Customer Growth

DRG: Daily Revenue Growth

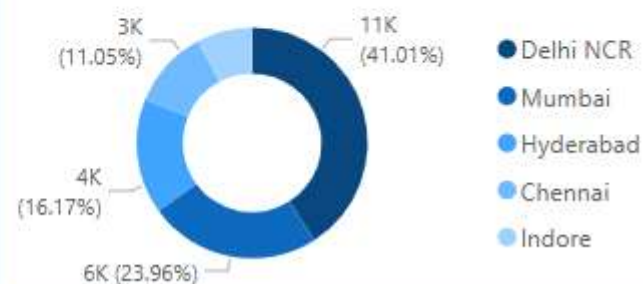
Revenue in (₹)

### Policy changes on month-over-month basis

month ● April ● December ● February ● January ● March ● November



### Customers by City



### % Customers by Month





## Sales Mode Analysis



### Filters

Customers

Revenue

Sales Mode

All

Age Group

All

City

All

Month

All

Policy ID

All

Revenue in (₹)

### Revenue Trend by Sales Mode over Month



### Sales Mode Trend over Month

Month	Offline-Agent	Offline-Direct	Online-App	Online-Website
Apr_23	1874	266	1116	893
Dec_22	2542	851	379	248
Feb_23	2100	499	701	585
Jan_23	2329	686	557	347
Mar_23	3582	843	1389	1267
Nov_22	2446	1111	160	70

### % Customers by Sales Mode





## Age Group Analysis



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### Filters

Customers

Revenue

Sales Mode

All

Age Group

All

City

All

Month

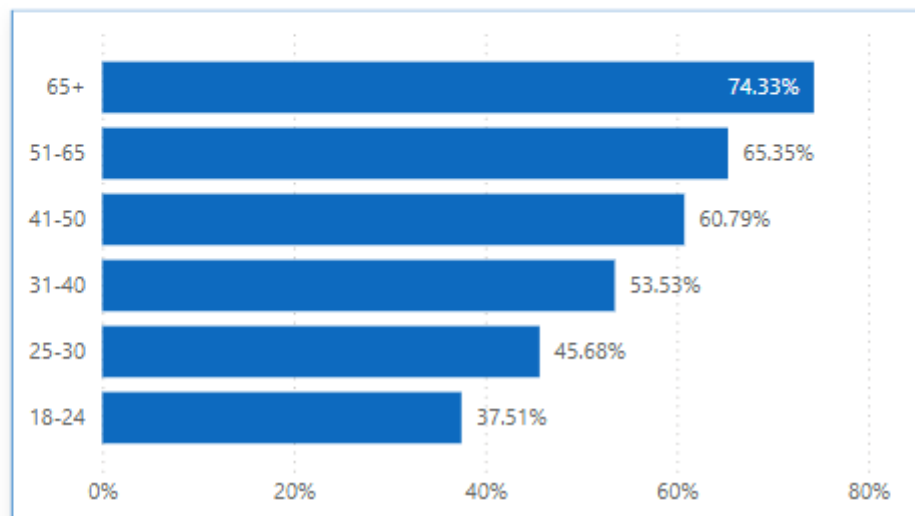
All

Policy ID

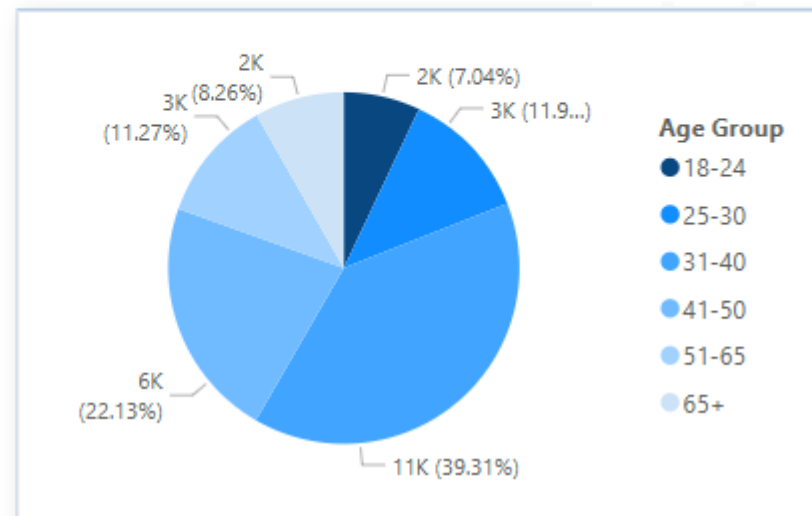
All

Revenue in (₹)

### Avg Settlement % by Age Group



### Customers by Age Group



### Policies across Age Groups

Policy ID	18-24	25-30	31-40	41-50	51-65	65+
POL1048HEL	31	101	601	364	255	316
POL2005HEL	33	82	504	369	364	616
POL3309HEL	234	450	1846	848	308	143
POL4321HEL	873	1149	1528	543	229	112
POL4331HEL	387	631	1669	662	239	147
POL5319HEL	94	275	1430	932	421	177
POL6093HEL	78	185	980	719	358	223
POL6303HEL	95	231	1207	894	413	177
POL9221HEL	65	114	787	608	439	305

### Sales Mode across Age Groups

Sales Mode	18-24	25-30	31-40	41-50	51-65	65+
Offline-Agent	1088	1806	5700	3346	1708	1225
Offline-Direct	332	587	1588	916	474	359
Online-App	271	469	1779	910	480	393
Online-Website	199	356	1485	767	364	239