

SHIELD INSURANCE

Home View

The **Home View** dashboard provides an overview of Shield Insurance's key reports, including General Overview, Sales Mode, and Age Group analysis. It serves as a navigation hub, summarizing insights on sales performance, customer distribution, and revenue trends.



General Overview

This **General Overview** dashboard summarizes key metrics for **Shield Insurance**, including total customers, revenue, and risk indicators. It provides a **city-wise and age-group breakdown** and **monthly revenue trends**, with filters for deeper insights.



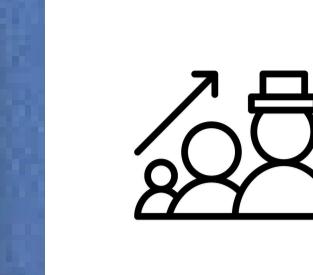
Sales Mode

This **Sales Mode** dashboard page provides an analysis of total sales, segmented into **online and offline sales**. It breaks down **total customers and revenue by different sales modes** (Offline-Agent, Online-App, etc.) and visualizes sales trends over time, helping to identify the most effective sales channels.



Age Mode

The **Age Group** dashboard analyzes total customers and estimated settlement amounts by age group. It provides trends over time, a breakdown by sales mode, and policy-wise revenue distribution, offering insights into customer demographics and claim estimates.



sales_mode

Age Group

city

Month

policy_id

27K

Total_customers

4.15K!
LM: 7.08K
(-41.41%)

989M

Total_Revenue

153.75M!
LM: 263.84M
(-41.73%)

5.47M

DRG

5.12M✓
LM: -110.09M
(+104.66%)

148.29

DCG

0.14K✓
LM: -2.93K
(+104.72%)

Customer Segmentation

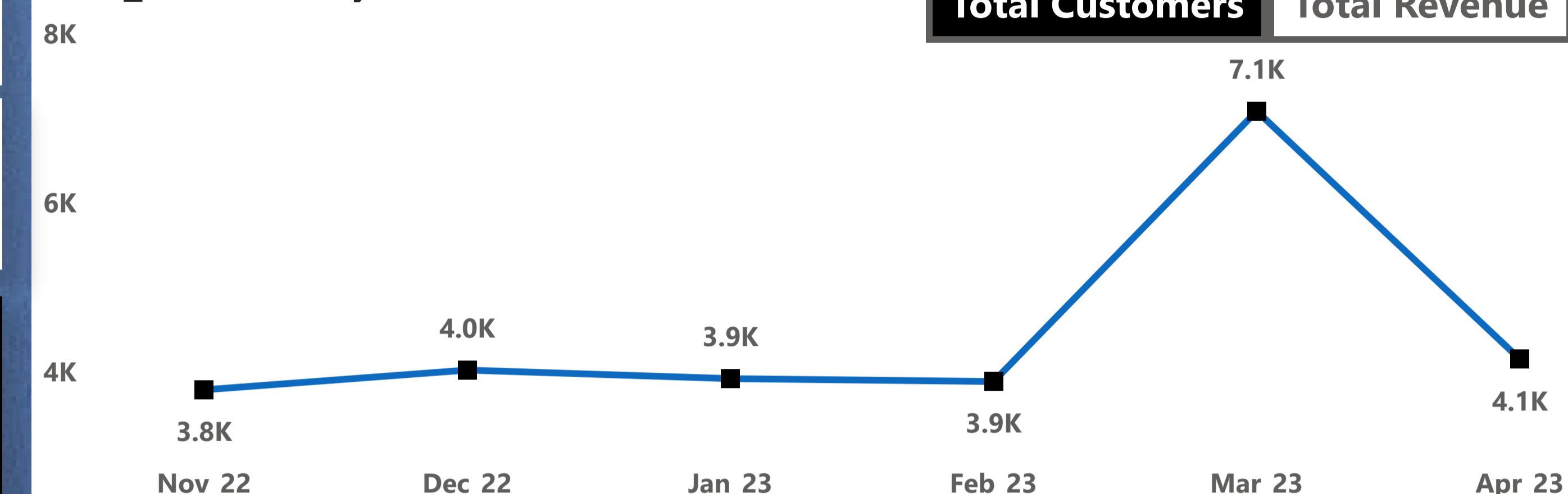
city	Age Group	Total_customers	Total_Revenue
Delhi NCR	31-40	4361	128.23M
Delhi NCR	41-50	2469	90.00M
Delhi NCR	65+	920	82.58M
Mumbai	31-40	2446	73.11M
Delhi NCR	51-65	1241	67.14M
Mumbai	41-50	1437	54.74M
Hyderabad	31-40	1697	50.79M
Mumbai	65+	540	48.24M
Mumbai	51-65	783	42.49M
Hyderabad	41-50	1002	39.14M
Total		26841	989.25M

LM = Last Month

DRG = Daily Revenue Growth

DCG = Daily Customer Growth

Total_customers by Month Trends



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

Revenue & Customer Split by Age Group

Age Group	Total_customers	Total_Revenue
31-40	10460	311.13M
41-50	6031	226.53M
65+	2235	203.92M
51-65	3077	165.62M
25-30	3194	56.74M
18-24	1844	25.32M
Total	26841	989.25M



sales_mode

All

Age Group

All

city

All

Month

All

policy_id

All

26.8K

Total_Sales

4.15K!
LM: 7.08K (-41.41%)

8K

Online_Sales

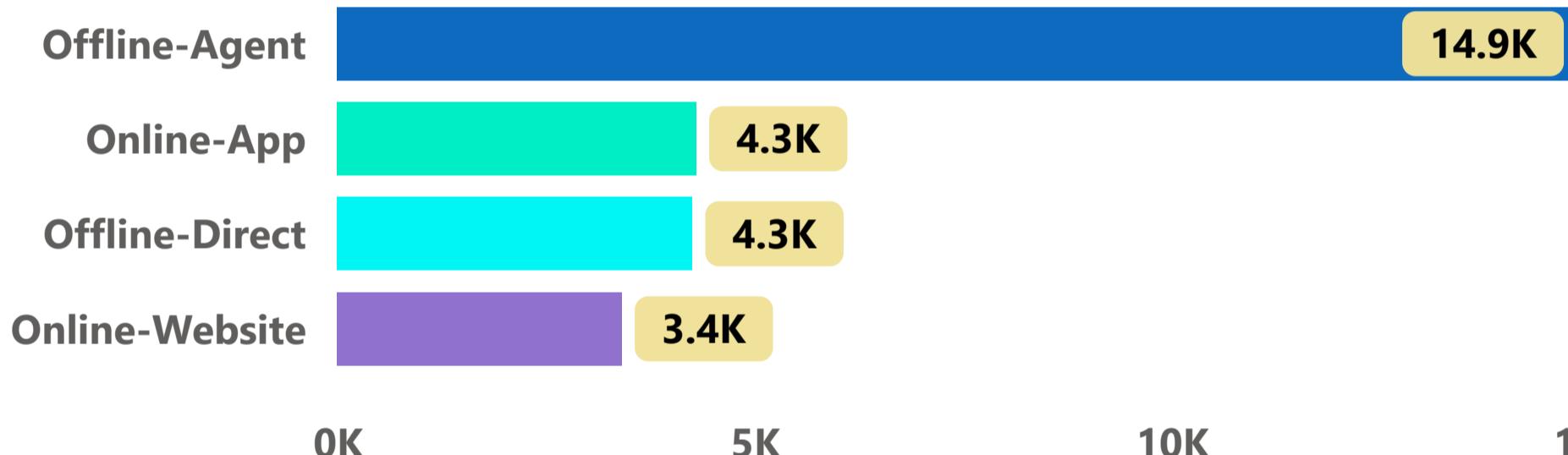
2.0K!
LM: 2.7K (-24.36%)

19K

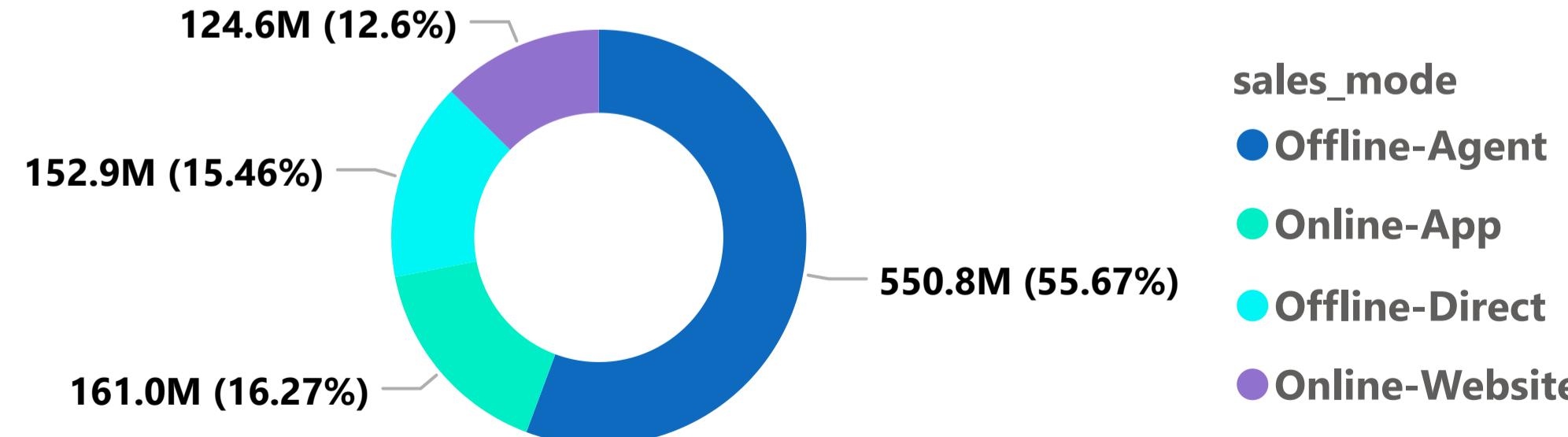
Offline_Sales

2.14K!
LM: 4.43K (-51.64%)

Total_customers by sales_mode



Total_Revenue by sales_mode



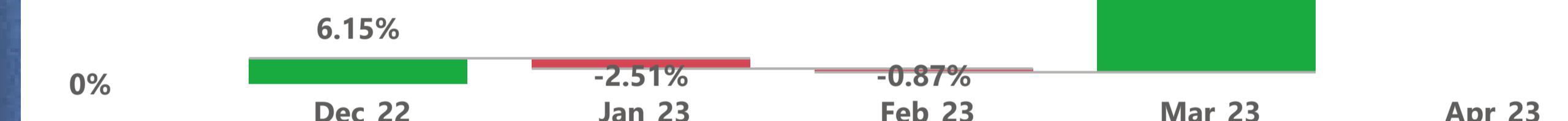
Month_Over_Month chng%

● Increase ● Decrease

100%

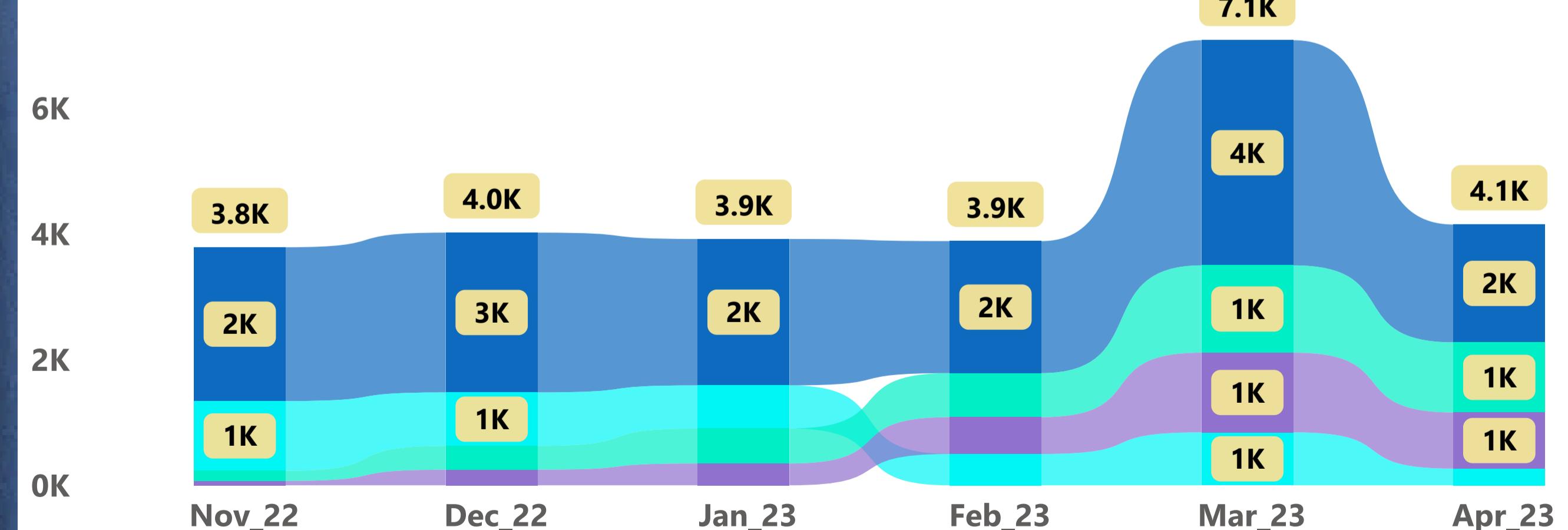
50%

0%



Total Customers

sales_mode ● Offline-Agent ● Offline-Direct ● Online-App ● Online-Website



LM = Last Month

DRG = Daily Revenue Growth

DCG = Daily Customer Growth



sales_mode

All

Age Group

All

city

All

Month

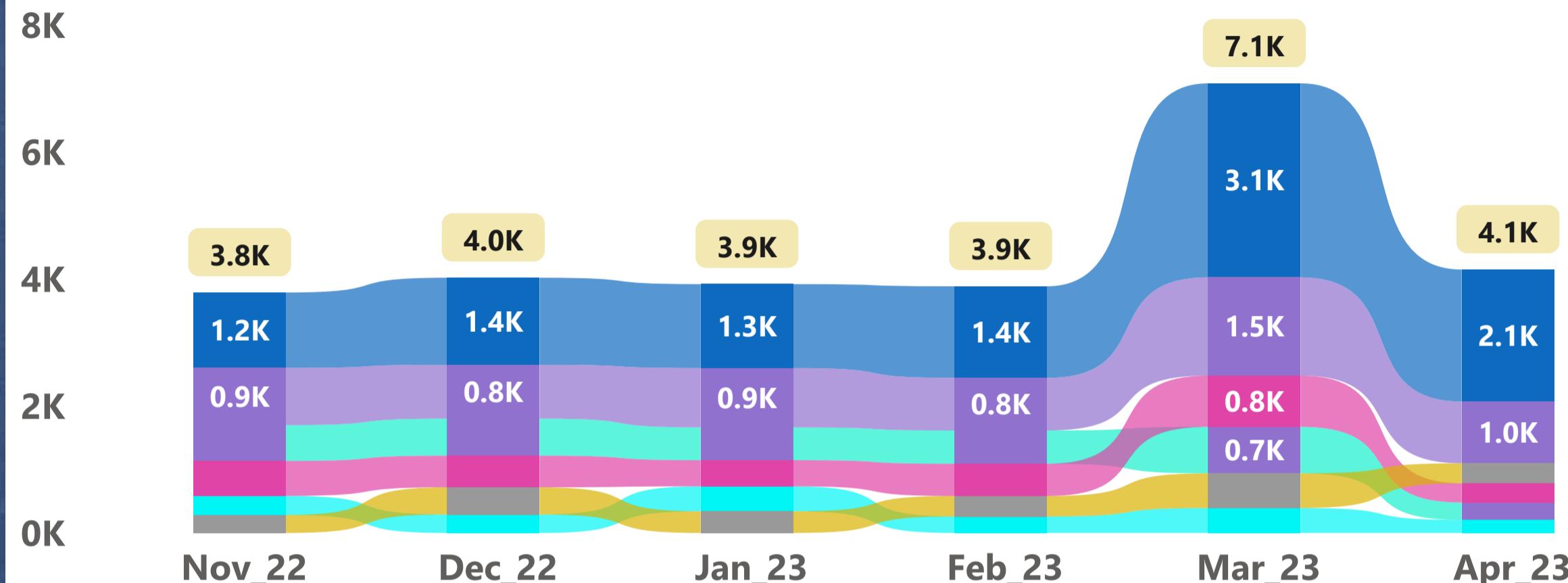
All

policy_id

All

Customers trends by Age Group

Age Group ● 18-24 ● 25-30 ● 31-40 ● 41-50 ● 51-65 ● 65+

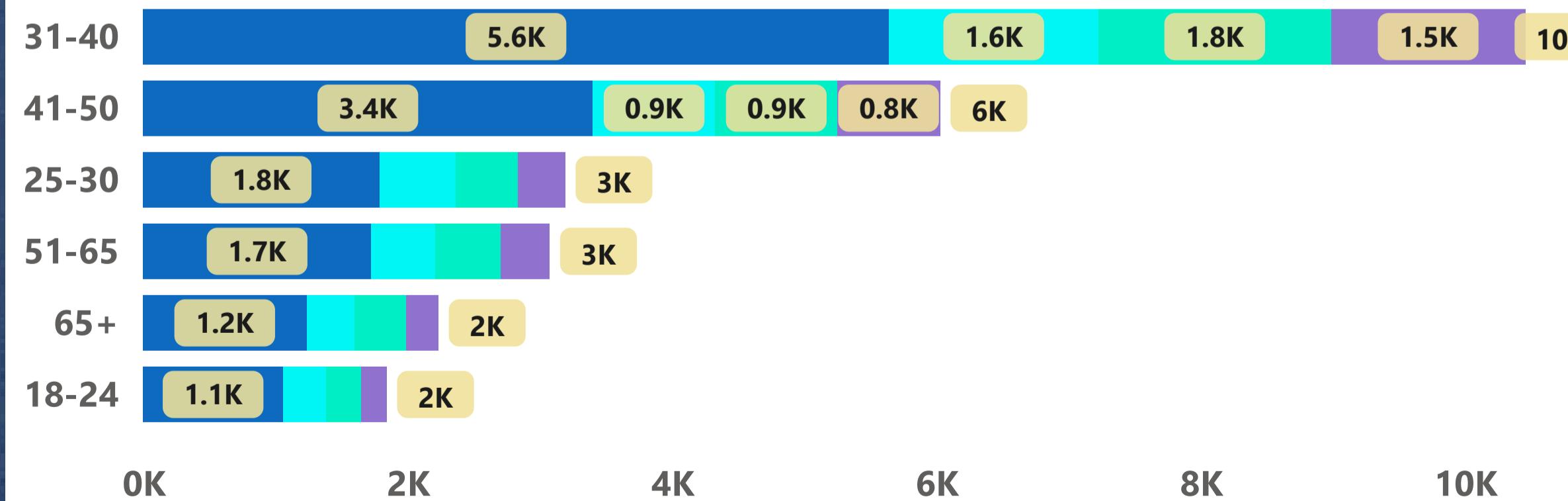


Age Group vs Policy Preference

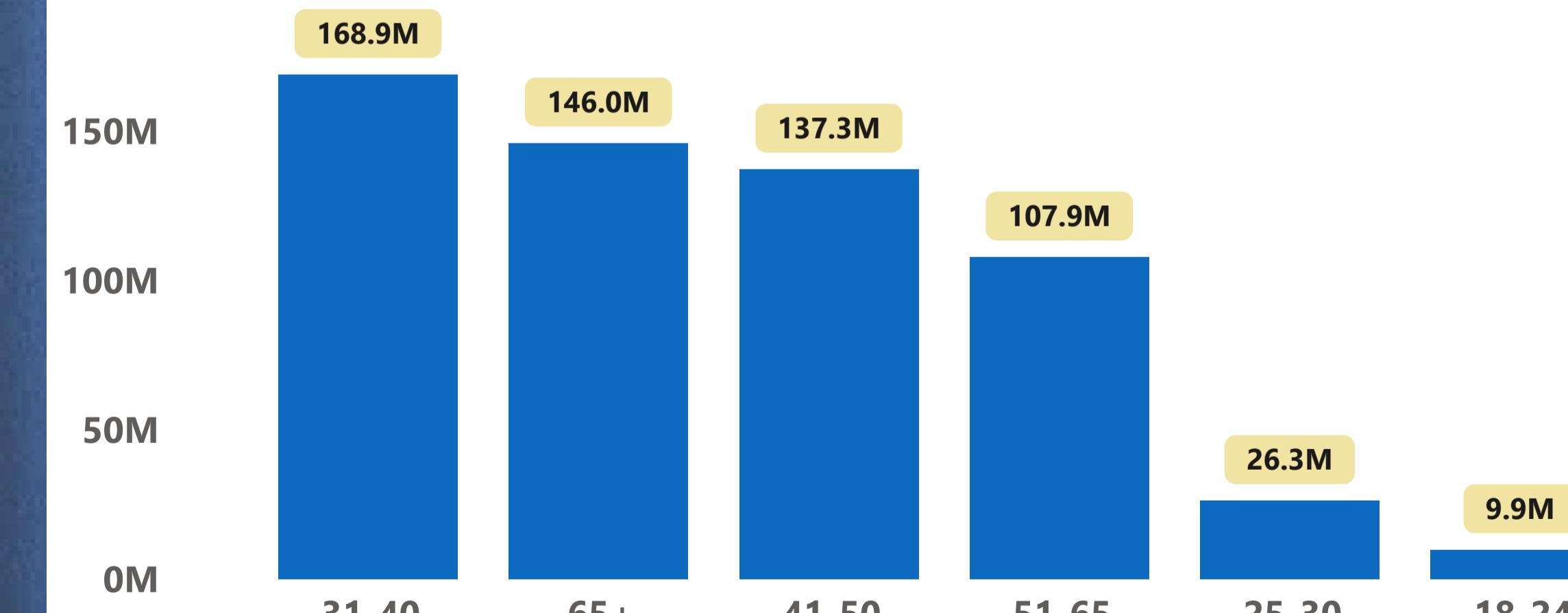
policy_id	18-24	25-30	31-40	41-50	51-65	65+	Total
POL2005HEL	3.96M	10.36M	71.82M	58.35M	62.28M	117.49M	324.26M
POL1048HEL	2.36M	8.37M	54.27M	36.30M	28.04M	38.50M	167.86M
POL9221HEL	2.78M	4.99M	39.61M	33.60M	26.67M	20.68M	128.33M
POL6093HEL	2.42M	6.26M	36.55M	29.63M	16.44M	11.24M	102.55M
POL6303HEL	2.08M	5.15M	30.89M	24.96M	12.68M	5.99M	81.76M
POL5319HEL	1.59M	4.80M	28.15M	20.41M	9.95M	4.69M	69.60M
POL3309HEL	2.85M	5.66M	26.26M	13.12M	5.34M	2.69M	55.92M
POL4331HEL	2.92M	5.03M	14.65M	6.62M	2.54M	1.74M	33.50M
POL4321HEL	4.35M	6.11M	8.92M	3.54M	1.66M	0.88M	25.47M
Total	25.32M	56.74M	311.13M	226.53M	165.62M	203.92M	989.25M

Total_customers by Age Group and sales_mode

sales_mode ● Offline-Agent ● Offline-Direct ● Online-App ● Online-Website



Expected settlement amount by Age Groups



LM = Last Month

DRG = Daily Revenue Growth

DCG = Daily Customer Growth