

Task 1: Data Exploration and Summary.



Average Age

28

Investment Avenue

37

NO Investment Avenue

3

Count of gender by saving objectives

Retirement Plan

24

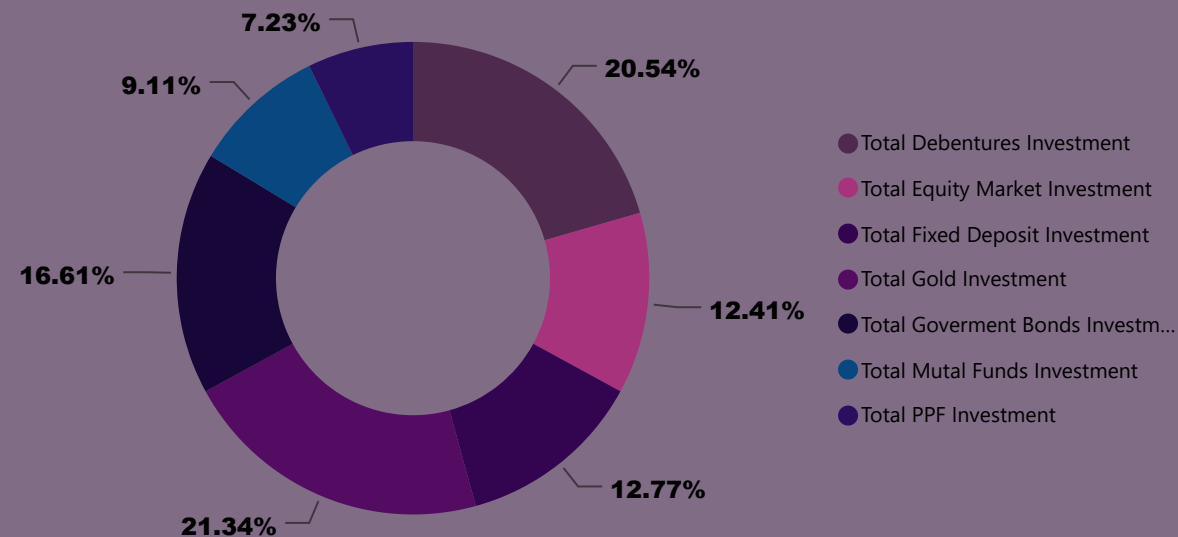
Health Care

13

Education

3

Percentage of Individuals with various Investments



Task 2: Gender- based Analysis



Female

15

Male

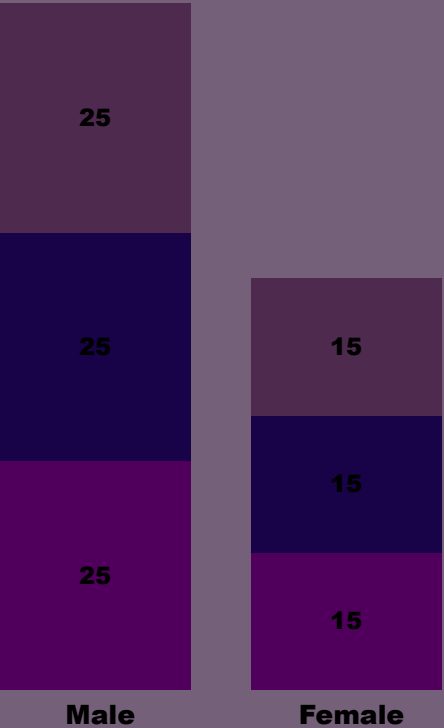
25

Count of Gender

40

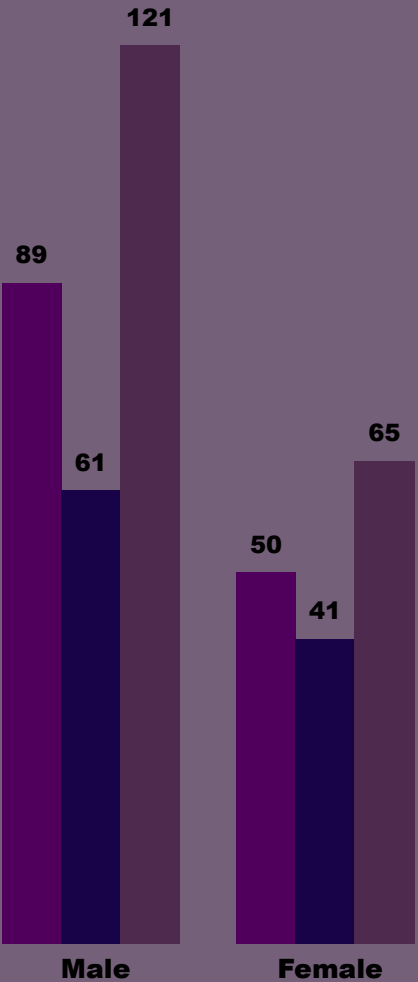
Count of Equity_Market, Mutual_Funds and Government_Bonds by gender

Count of Equity_Market Mutual_Funds Government_Bonds



Sum of Equity_Market, Mutual_Funds and Government_Bonds by gender

Sum of Equity_Market Mutual_Funds Government_Bonds

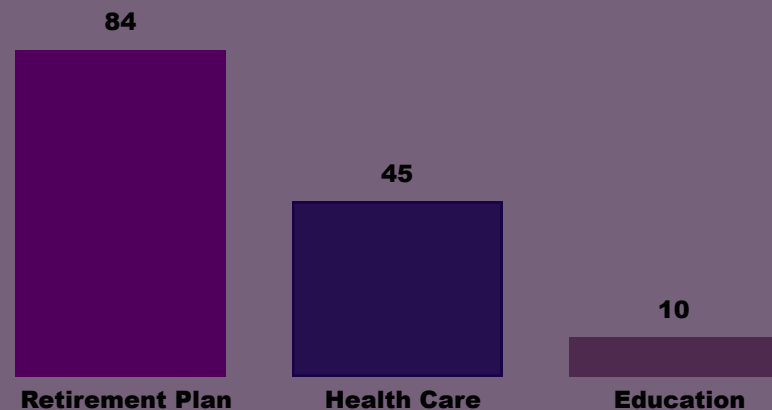


Key Insights

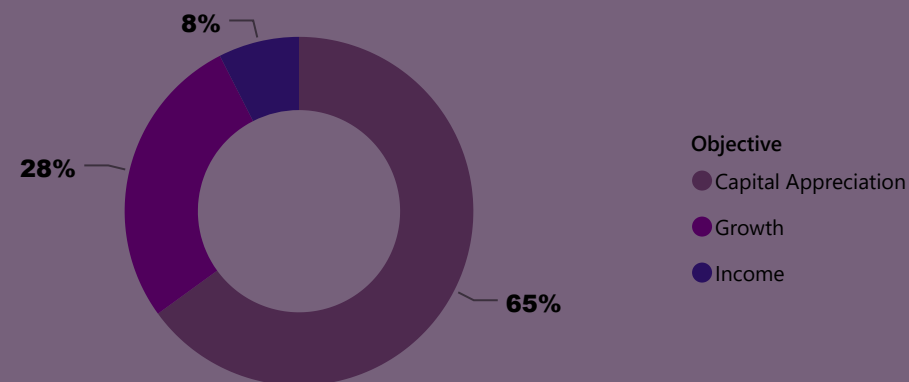
- The chart reveals distinct investment patterns based on gender.
- In the case of Female Investors, the Sum of investment amount of Equity Market is 50, Mutual funds is 41, and Government Bonds is 65.
- In the case of Male Investors, the Sum of investment amount of Equity Market is 89, Mutual funds is 61, and Government Bonds is 121.
- Government Bonds emerge as the predominant investment choice for both genders with males having higher allocation compared to females.

Task 3: Objective Analysis

Equity Market by savings objectives

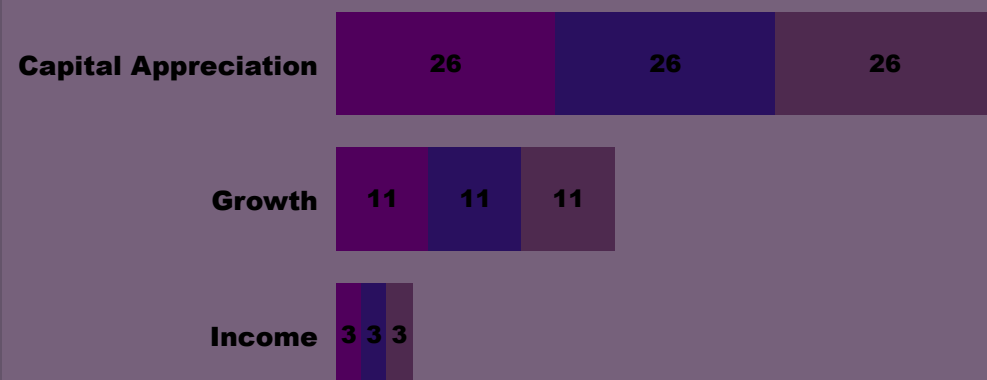


Equity Market by Objective



Gold, Debentures and Fixed_Deposits by Objective

● Count of Gold ● Count of Debentures ● Count of Fixed_Deposits



Avenue by objective

Objective ● Capital Appreciation ● Growth ● Income



Objective

Capital Appreciation

Growth

Income

Task 4: Investment Duration and Frequency

Equity

10

Mutual Funds

18

Fixed Deposits

9

Public Provided Fund

3

Avenue



Select all

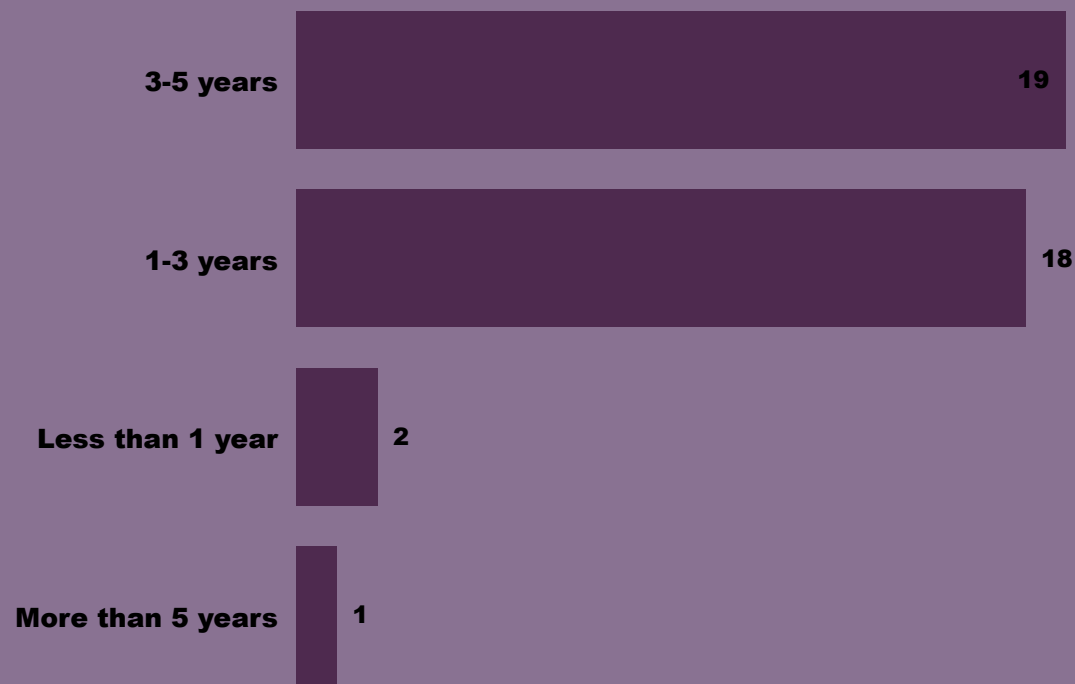
Equity

Fixed Deposits

Mutual Fund

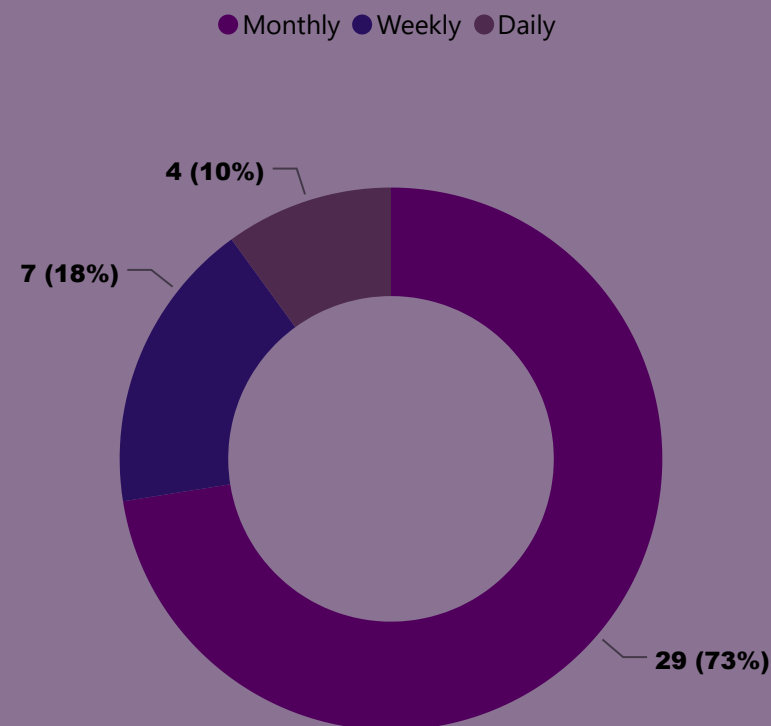
Public Provident Fund

Avenue by Duration



Count of Avenue

Duration by Invest Monitor



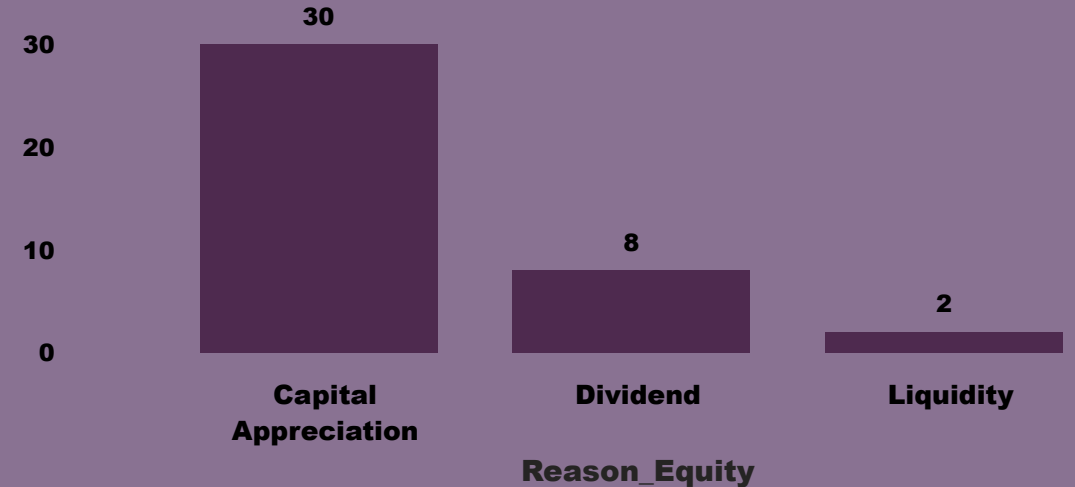
Task 5: Reasons For Investment



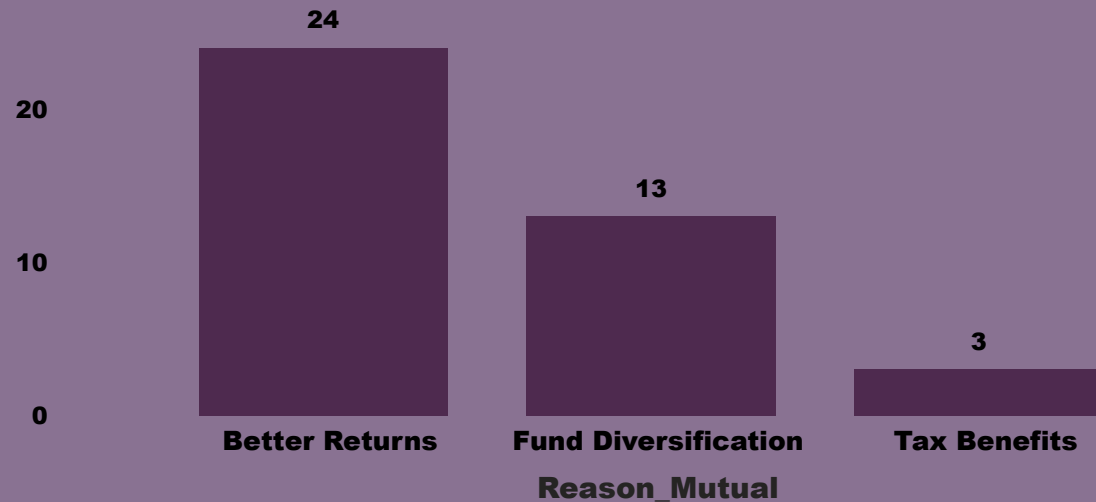
Reason for Investment in Bonds



Reason for Investment in Equity



Reason for Investment in Mutal Funds



Reason for Investment in FD



Task 6: Source of Information



Source

Select all

Financial Consultants

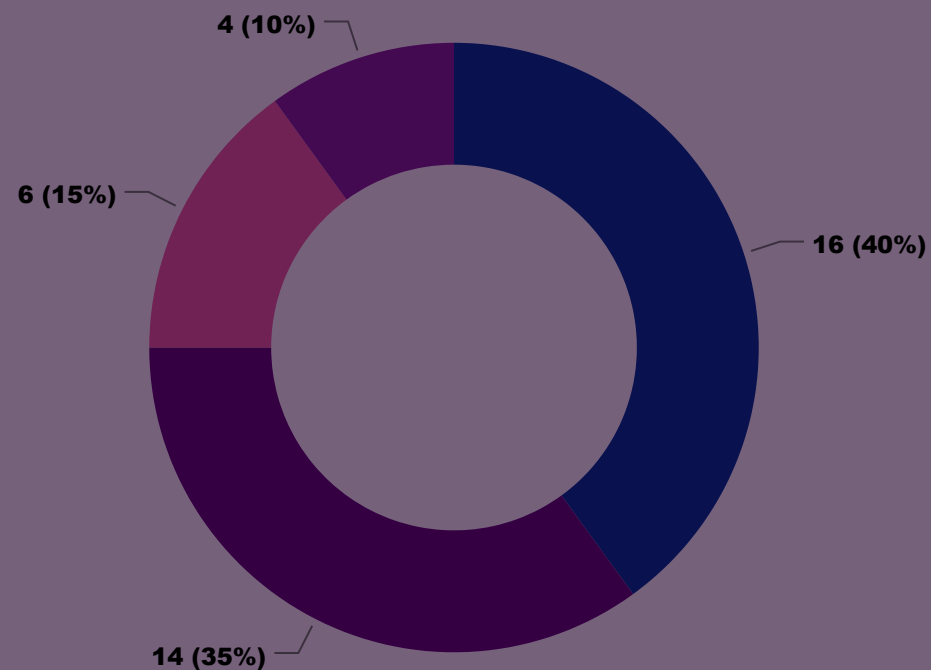
Internet

Newspapers and Magazines

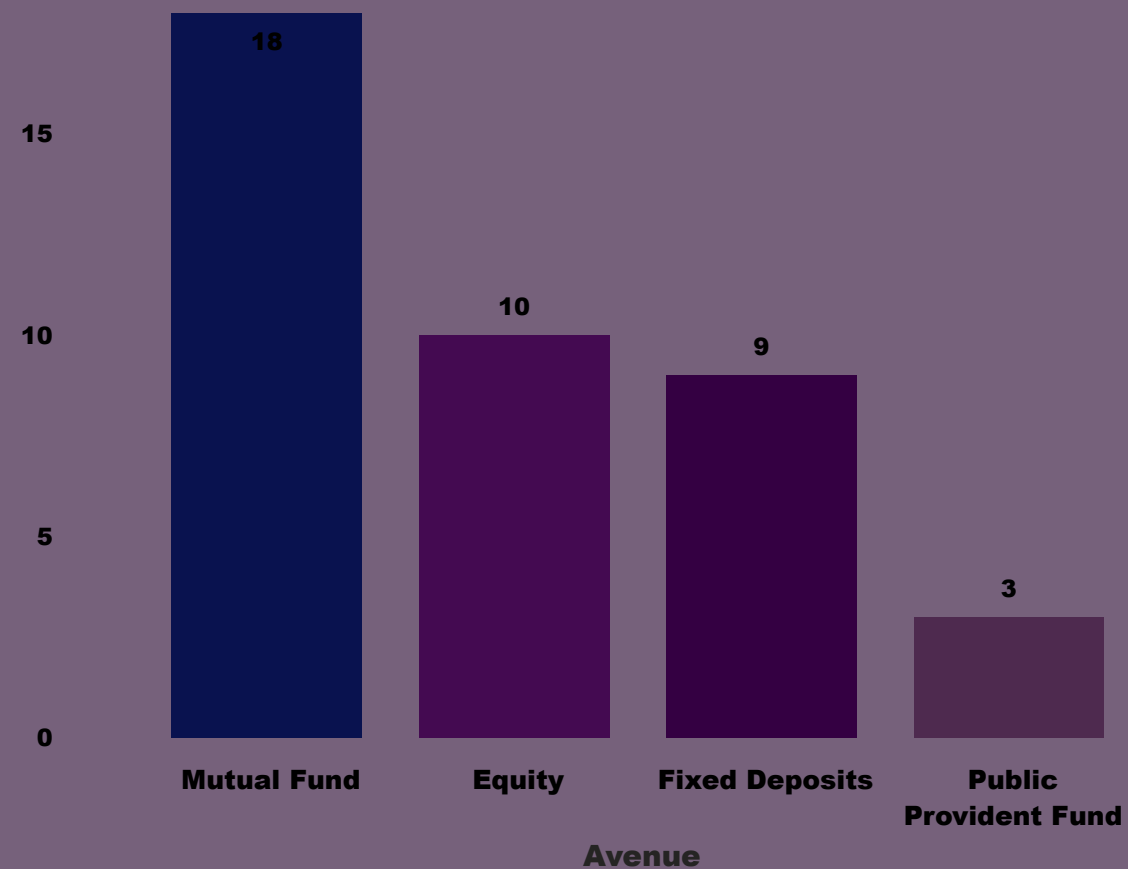
Television

Sources used by individuals for gathering Investment Information

● Financial Consultants ● Newspapers and Magazines ● Television ● Internet



Source by Avenue



Task 7: Combine Insights Into a Dashboard



Average Age

28

Female

15

Male

25

Reason Mutual

All

Avenue

Select all

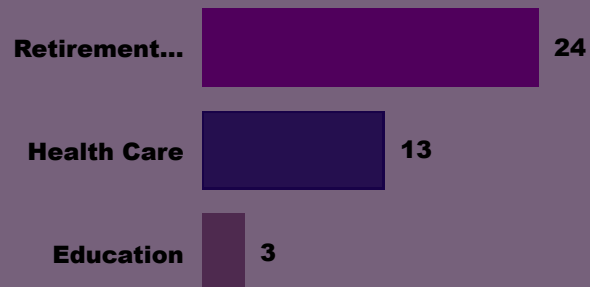
Equity

Fixed
Deposits

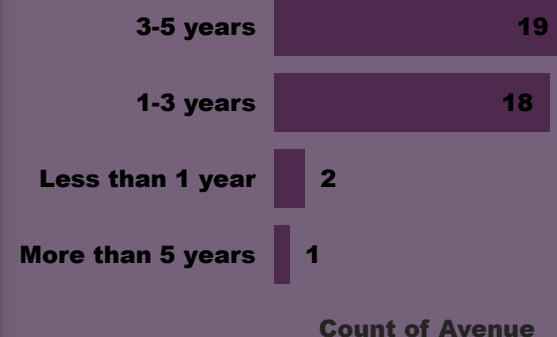
Mutual Fund

Public
Provident F...

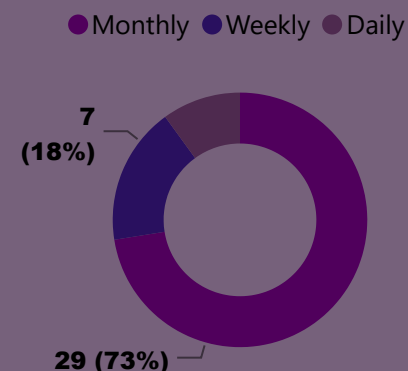
Count of gender by saving objectives



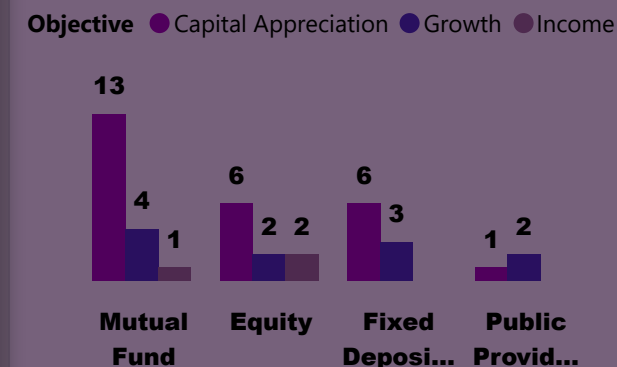
Avenue by Duration



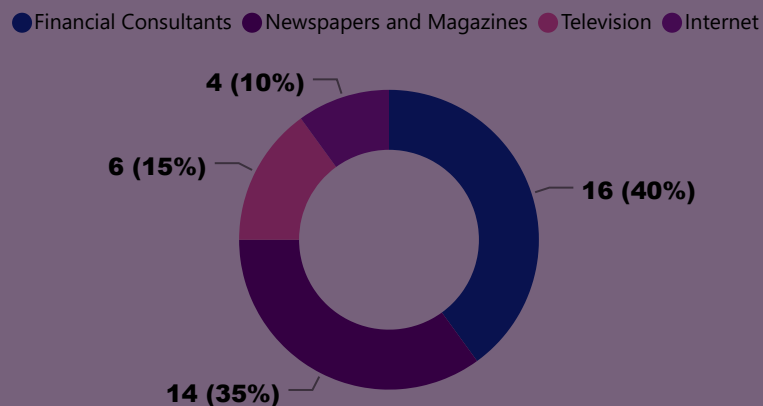
Duration by Invest Monitor



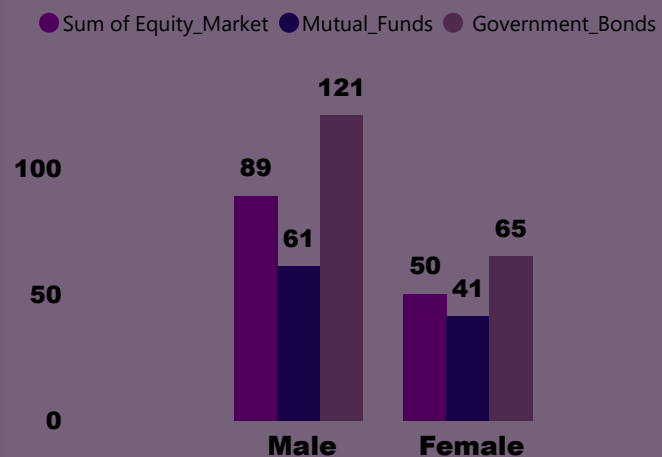
Avenue by objective



Sources used by individuals for gathering Investment Information



Investment based on Gender



Percentage of Individuals with various Investments

