



Personalized Investment Strategy Recommendation

Introduction

Overview

Investment
Behavior

Personalized
Recommenda...

External
Influence

Return-to-Risk
Profile

Recommendati
ons

Investor-
Specific

Summary



Personalized Investment Strategy Recommendation

The dataset "Finance_Data.csv" contains financial and investment-related information from 5,000 individuals. It includes 24 columns

Let's Analyze



Personalized Investment Strategy Recommendation

Avenue
All

Introduction

Overview

Investment Behavior

Personalized Recommendations

External Influence

Return-to-Risk Profile

Recommendations

Investor-Specific

Summary

22474

22769

22790

22397

22835

22302

Sum of Equity_Market

Sum of Gold

Sum of Fixed_Deposits

Sum of Mutual_Funds

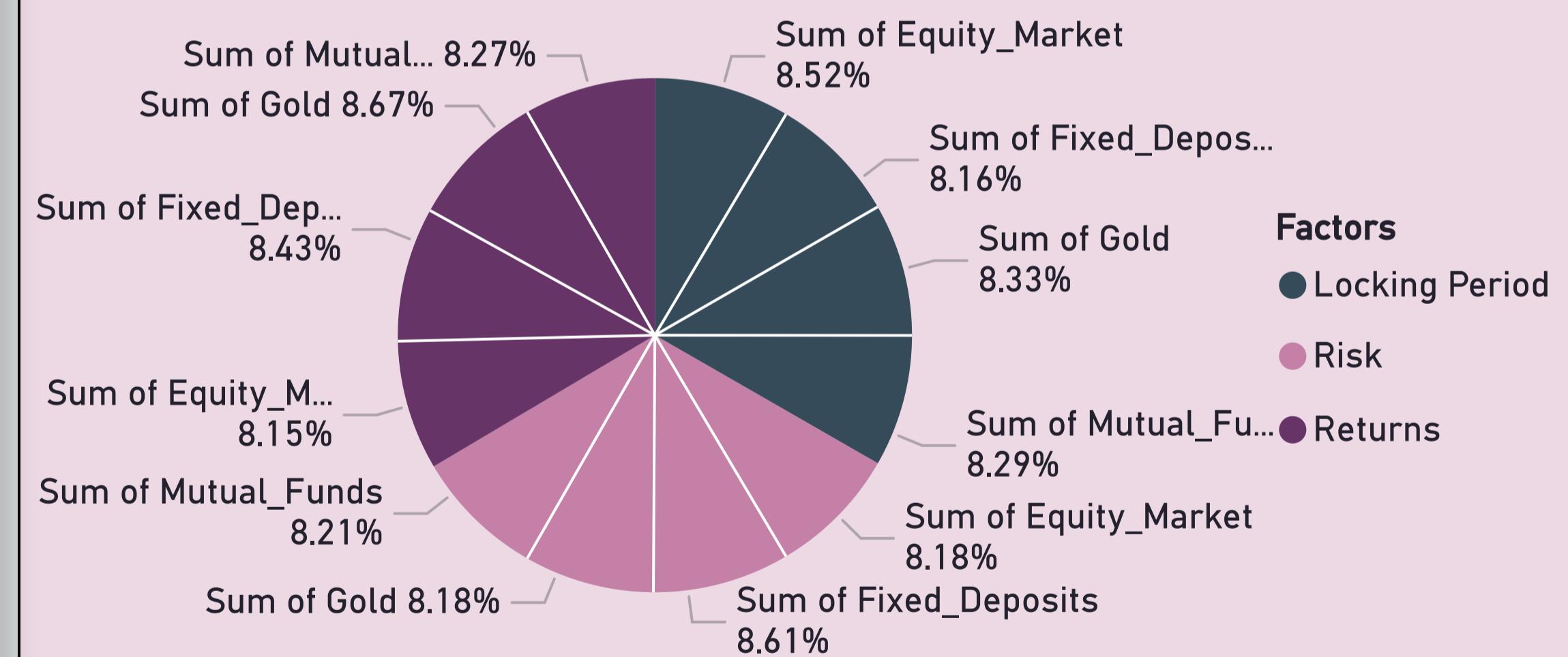
Sum of PPF

Sum of Debentures

Sum of Equity_Market, Sum of Gold, Sum of PPF and Sum of Mutual_Funds by gender



Sum of Equity_Market, Sum of Fixed_Deposits, Sum of Gold and Sum of Mutual_Funds by Factor



Summary

The 'Other' gender group led Equity Market investments with 1330 (35.57%), 15.85% higher than females, showing a positive correlation with Gold and strong investment across all avenues.



Investment Behavior Insights

Avenue

All



Introduction

Overview

Investment Behavior

Personalized Recommendations

External Influence

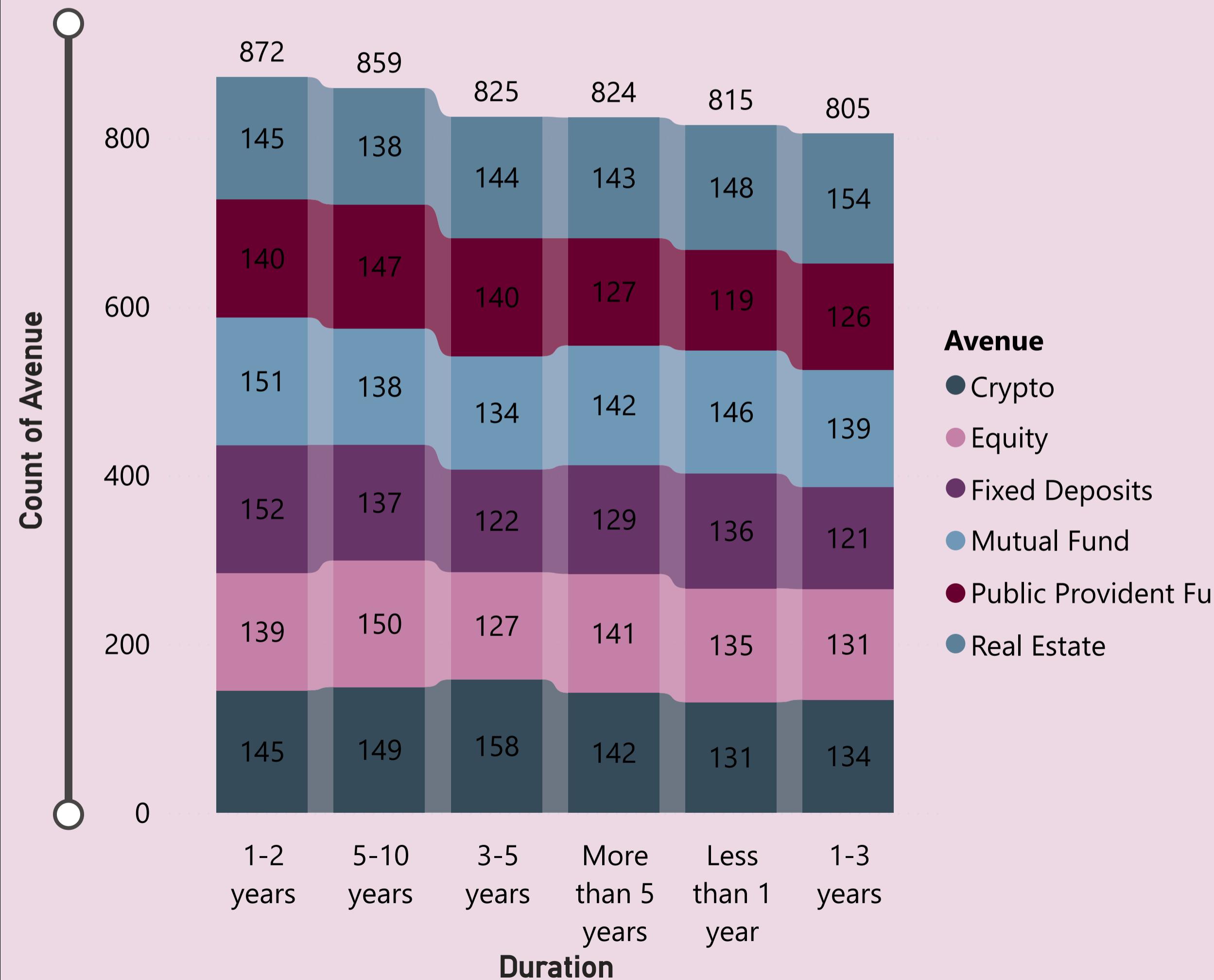
Return-to-Risk Profile

Recommendations

Investor-Specific

Summary

Count of Avenue by Duration and Avenue



Count of Avenue by Purpose

Purpose ● Savings for Future ● Wealth Creation ● Returns



Summary

1-2 years:

- . 152 units in Avenue Fixed Deposits
- . 151 units in Avenue Mutual Funds
- . 150 units in Avenue Provident Fund

3-5 years:

- . 150 units in Avenue Real Estate
- . 3.16% of Count Avenue in Avenue Crypto

5-10 years:

- . 150 units in Avenue Equity

Personalized Investment Strategy Recommendation

Avenue

Search



Introduction

Overview

Investment Behavior

Personalized Recommendations

External Influence

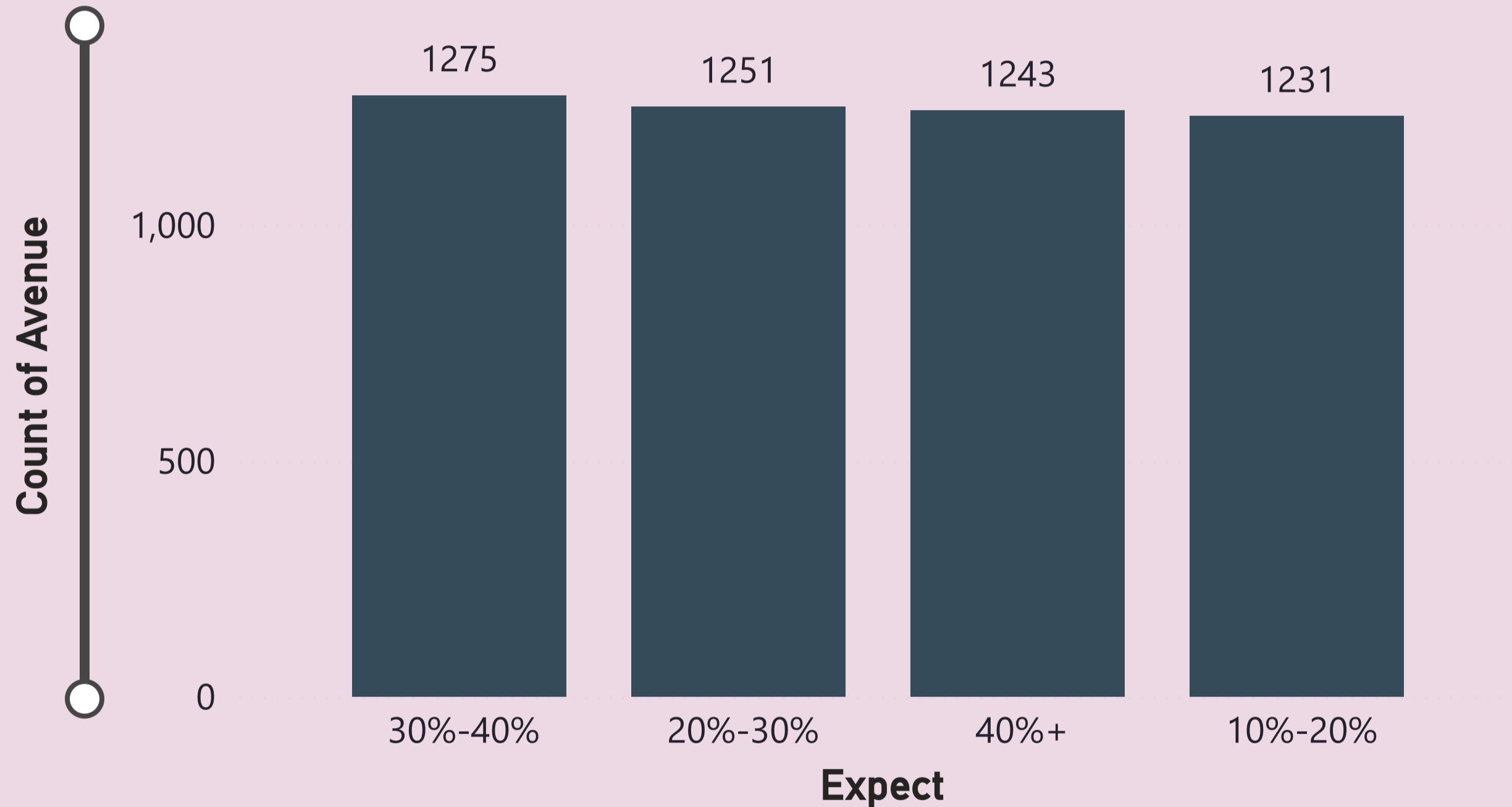
Return-to-Risk Profile

Recommendations

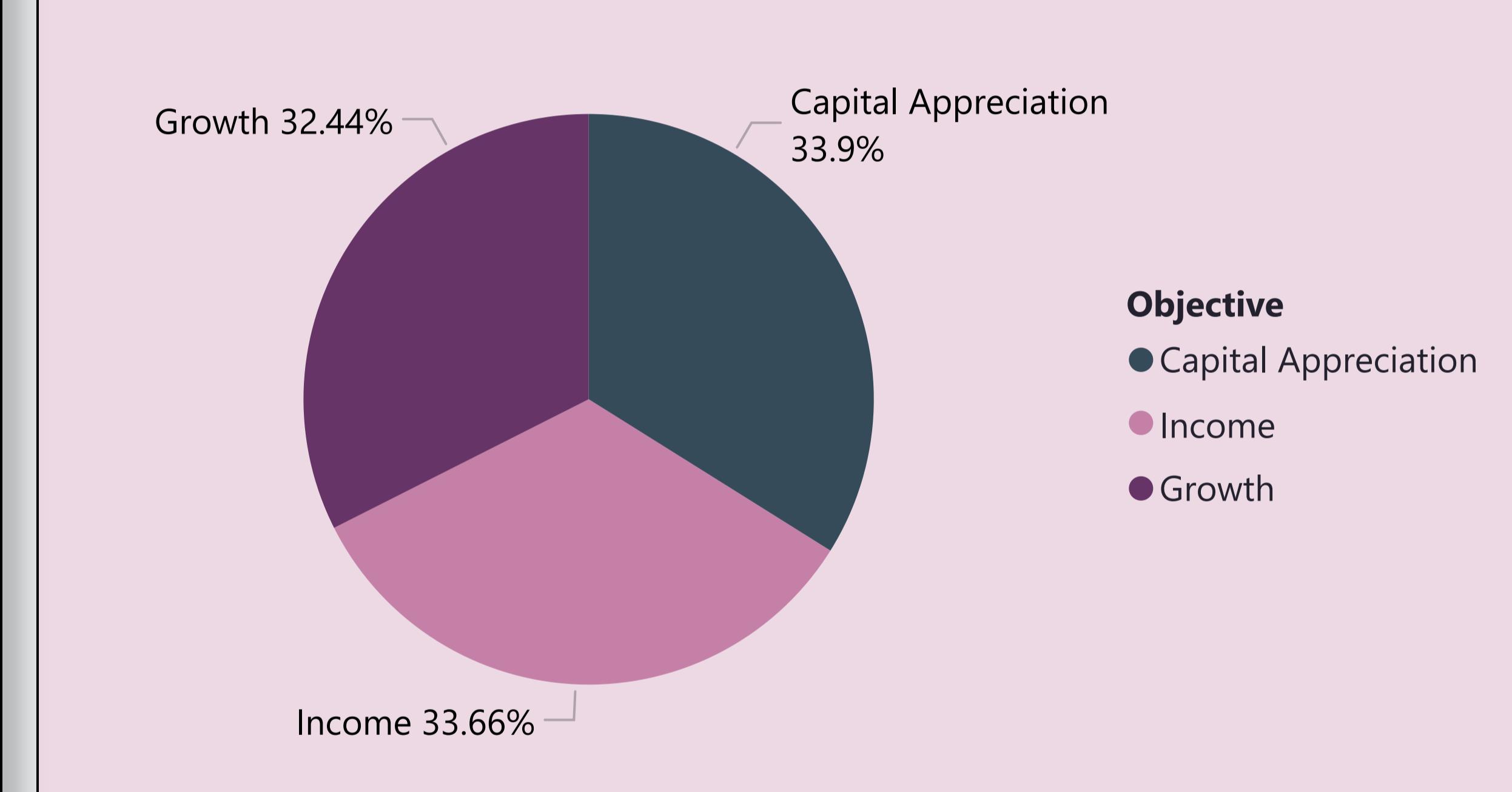
Investor-Specific

Summary

Count of Avenue by Expect



Count of Avenue by Objective



Count of Avenue by Reason_Bonds



Summary

At 1,275, 30%-40% had the highest Count of Avenue and was 3.57% higher than 10%-20%, which had the lowest Count of Avenue at 1,231. 30%-40% had the highest Count of Avenue at 1,275, followed by 20%-30%, 40%+, and 10%-20%. 30%-40% accounted for 25.50% of Count of Avenue. Across all 4 Expect, Count of Avenue ranged from 1,231 to 1,275.



External Influence & Reasoning Summary

Introduction

Overview

Investment Behavior

Personalized Recommen...

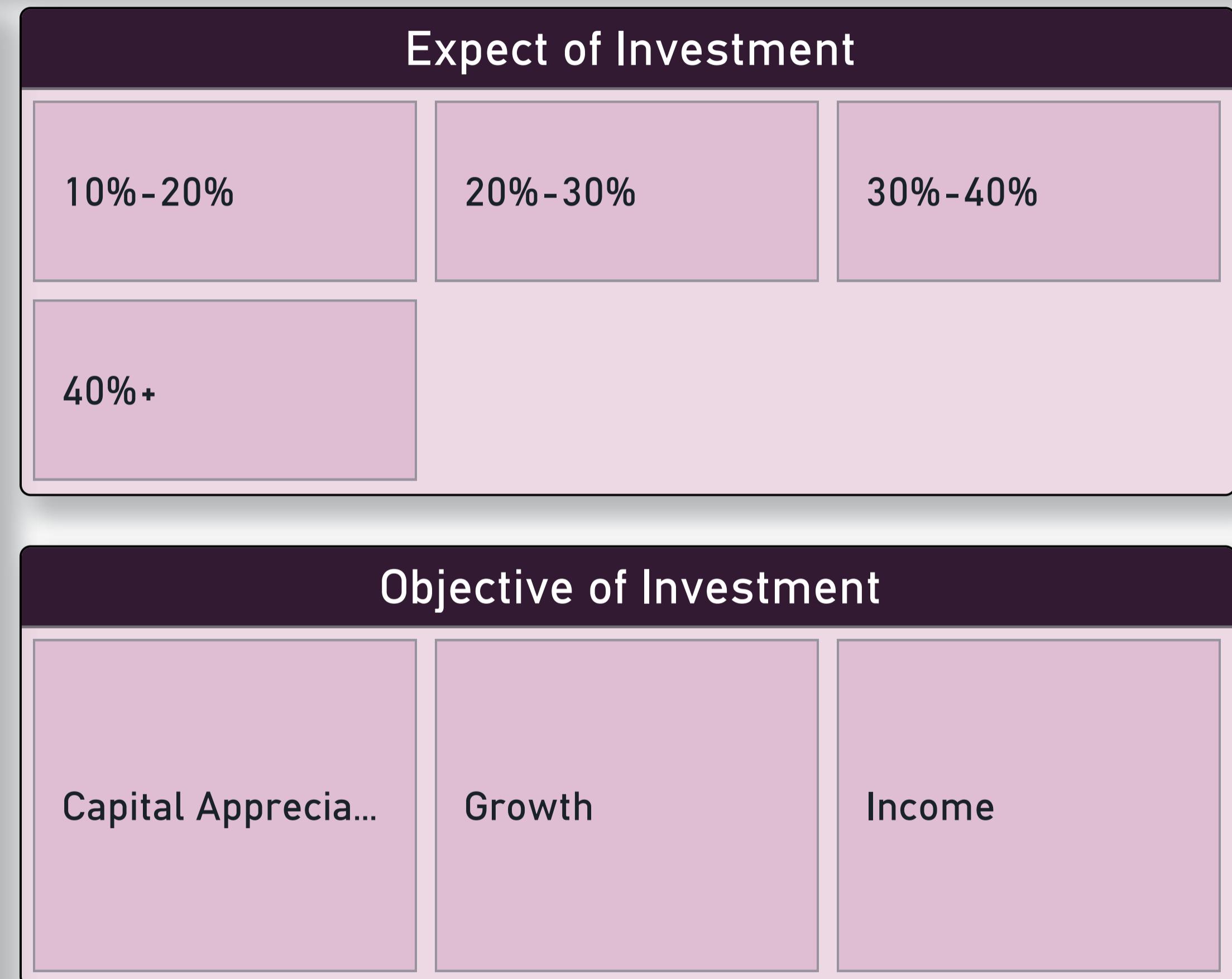
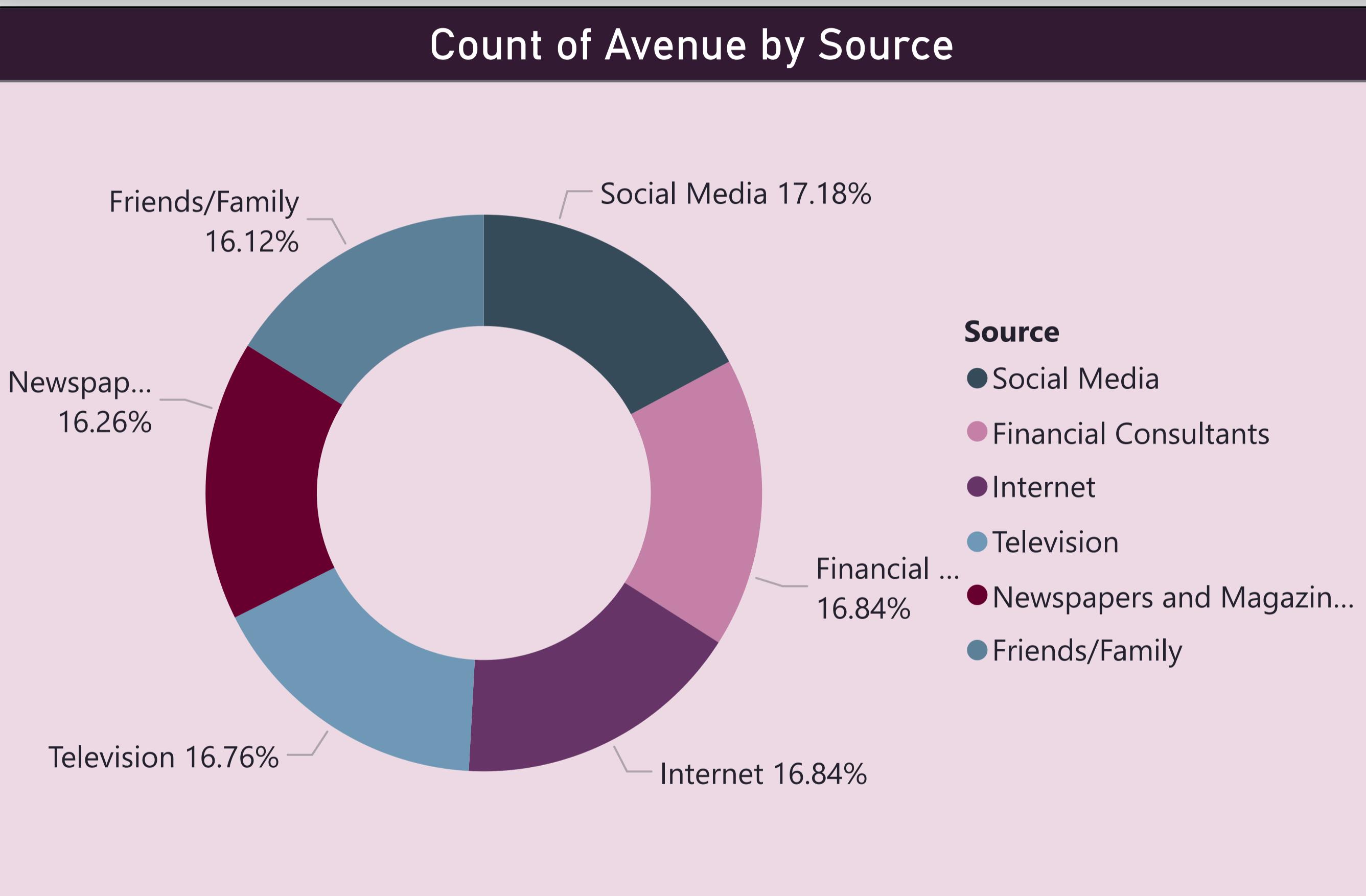
External Influence

Return-to-Risk Profile

Recommendations

Investor-Specific

Summary



Summary

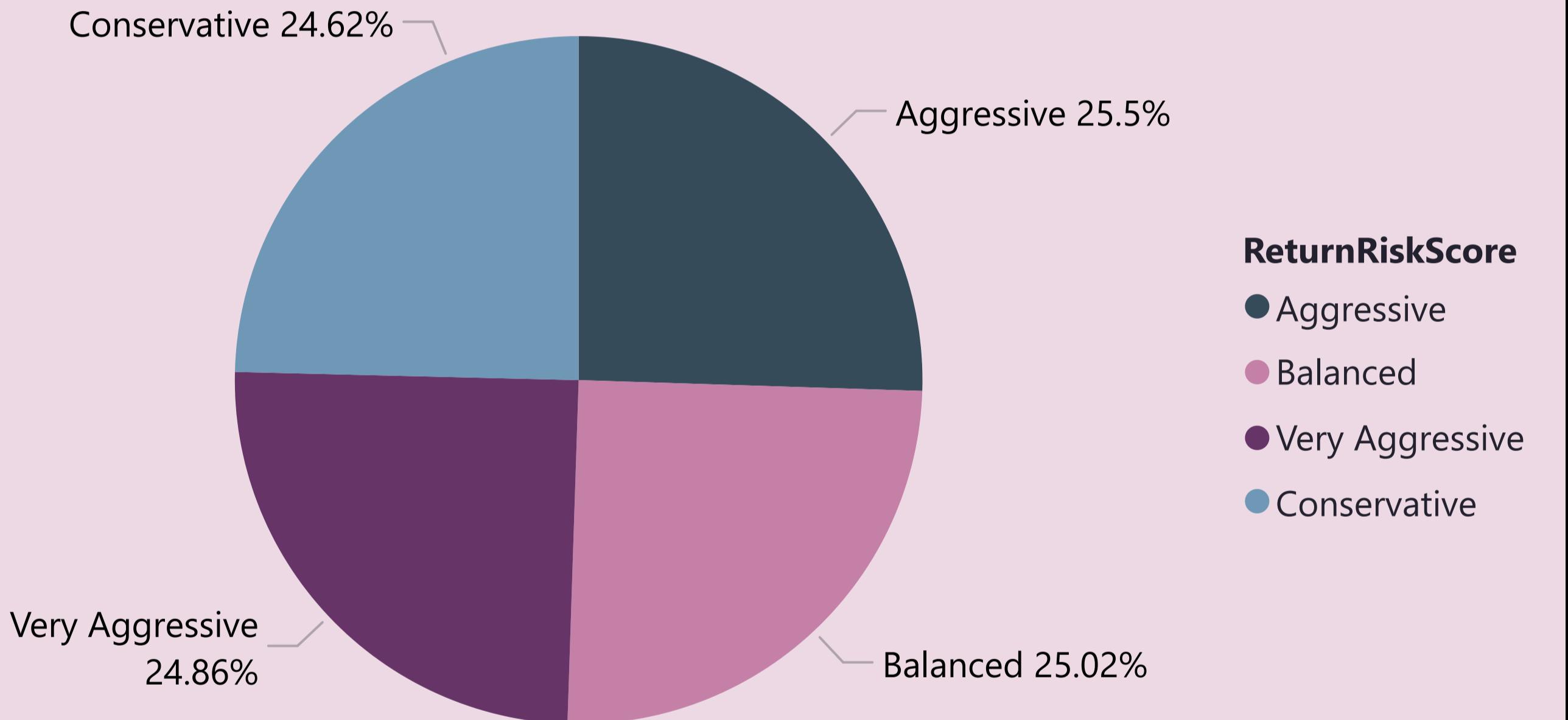
Social Media had the highest Count of Avenue at 859. Friends/Family had the lowest Count of Avenue at 806. Social Media accounted for 17.18% of Count of Avenue.



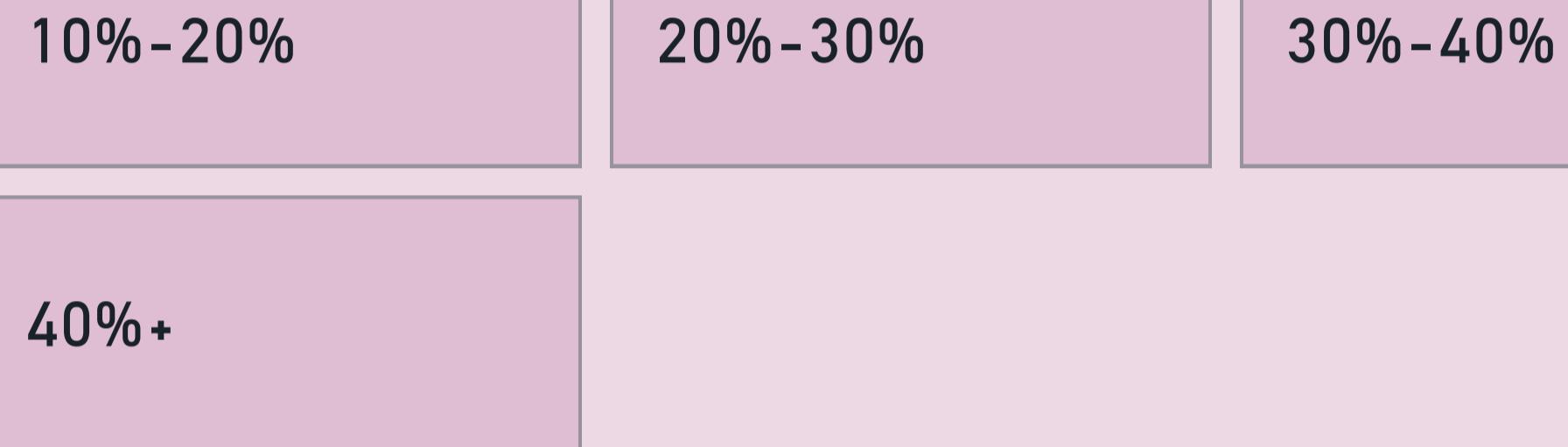
Return to Risk Profile

[Introduction](#)[Overview](#)[Investment Behavior](#)[Personalized Recommenda...](#)[External Influence](#)[Return-to-Risk Profile](#)[Recommendations](#)[Investor-Specific](#)[Summary](#)

Count of Avenue by ReturnRiskScore



Expect of Investment



Objective of Investment

Capital Appreciation, Growth, Income

Summary

Personalized portfolios are recommended based on return expectations: Equity/Crypto for Very Aggressive, Equity/Mutual Funds for Aggressive, Mutual Funds/Bonds for Balanced, and PPF/FD for Conservative profiles.



Recommendations

Introduction

Overview

Investment Behavior

Personalized Recommenda...

External Influence

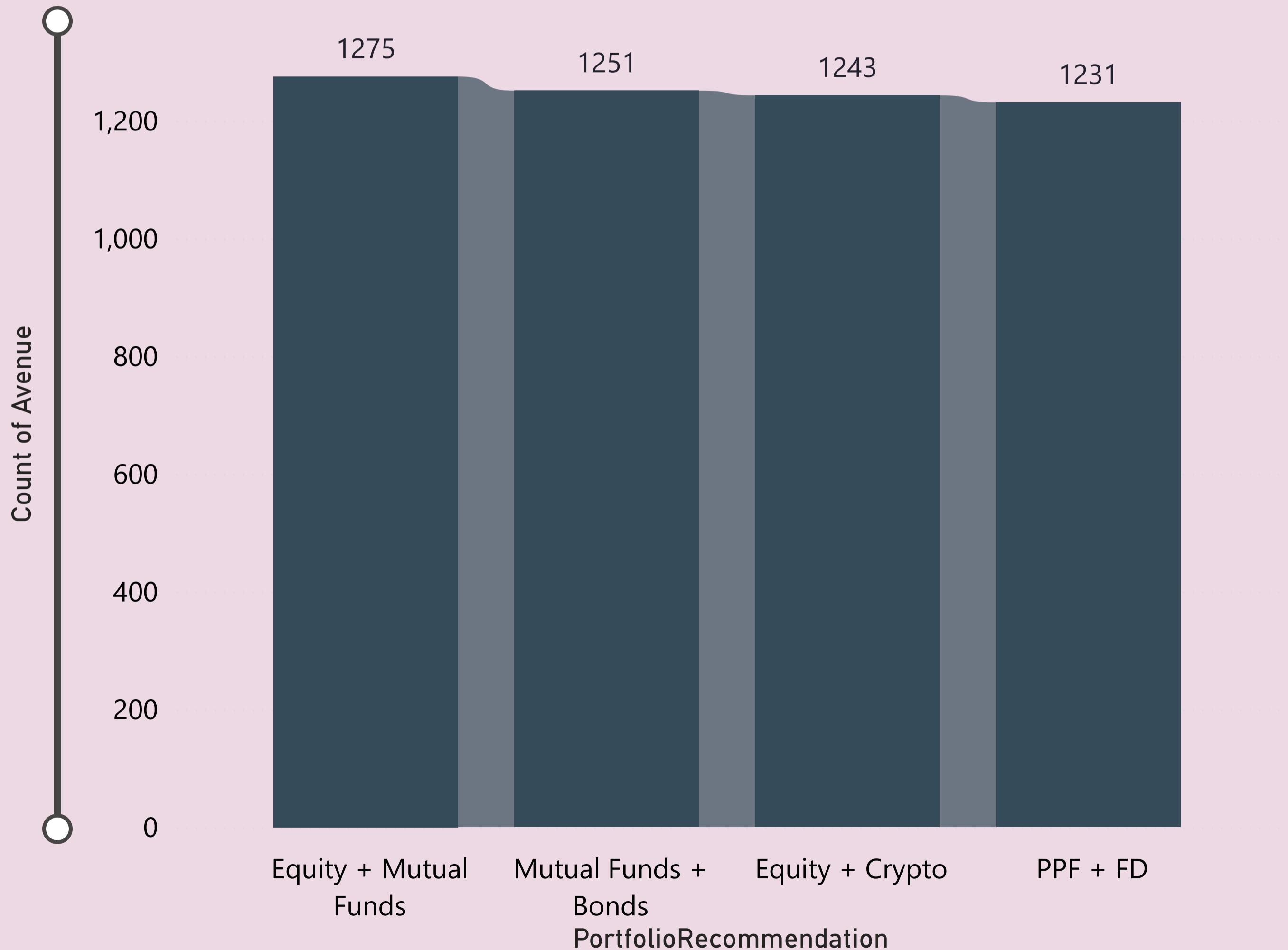
Return-to-Risk Profile

Recommendations

Investor-Specific

Summary

Count of Avenue by PortfolioRecommendation



Expect of Investment

10%-20%

20%-30%

30%-40%

40%+

Objective of Investment

Capital Apprecia...

Growth

Income

Summary

At 1,275, Equity + Mutual Funds had the highest Count of Avenue and was 3.57% higher than PPF + FD, which had the lowest Count of Avenue at 1,231.

Equity + Mutual Funds had the highest Count of Avenue at 1,275, followed by Mutual Funds + Bonds, Equity + Crypto, and PPF + FD.

Equity + Mutual Funds accounted for 25.50% of Count of Avenue.

Across all 4 PortfolioRecommendation, Count of Avenue ranged from 1,231 to 1,275.



Investor Specific Portfolio

Avenue

All



Introduction

Overview

Investment Behavior

Personalized Recommendations

External Influence

Return-to-Risk Profile

Recommendations

Investor-Specific

Summary

Expect

All

Objective

All

Purpose of Investment

All

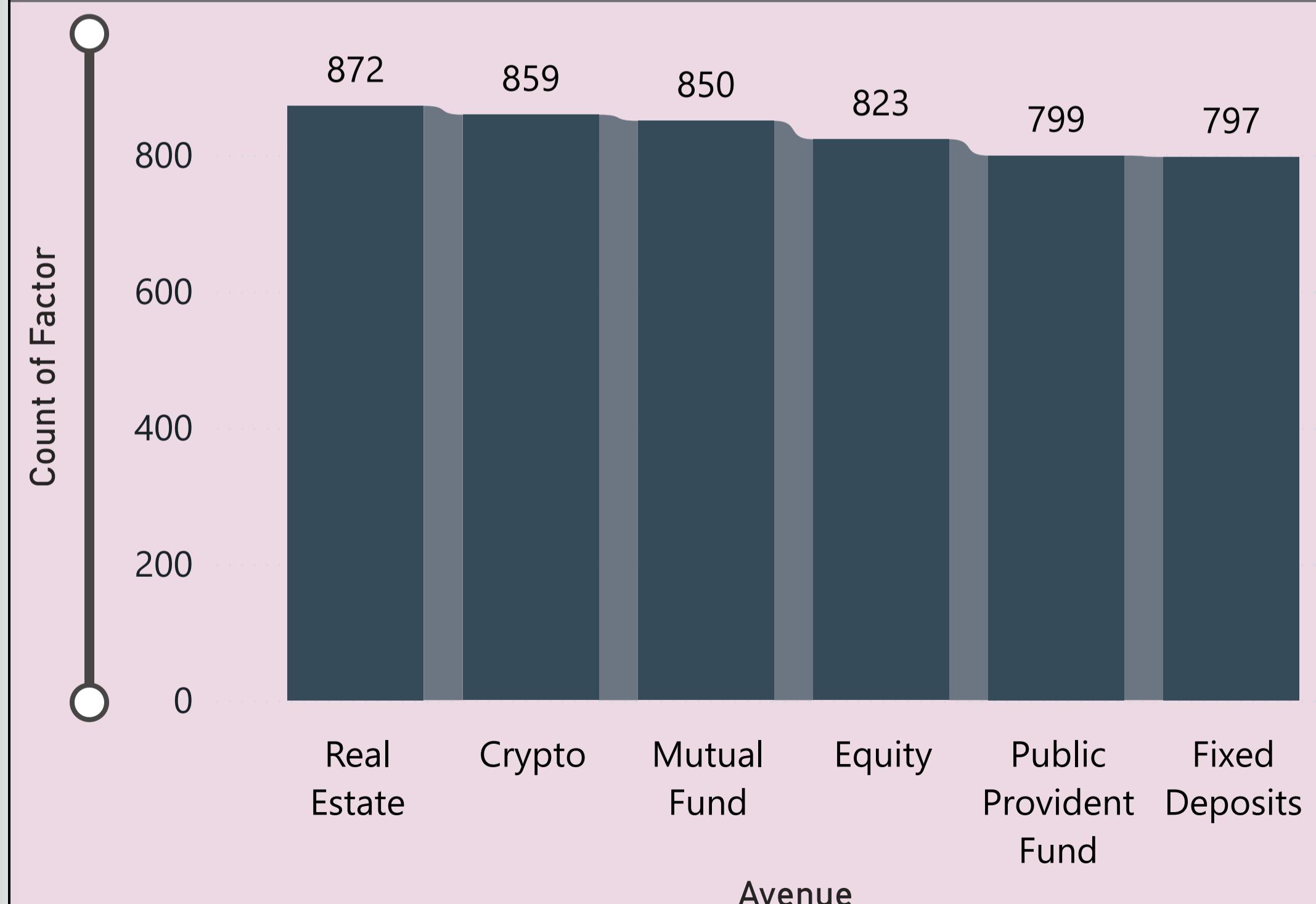
Age

All

Table Data

| Avenue | Average of Gold | Average of Equity_Market | Average of FixedDeposits | Average of RealEstate |
|--------------|-----------------|--------------------------|--------------------------|-----------------------|
| Crypto | 7.00 | 6.00 | 3.00 | 872 |
| Crypto | 7.00 | 2.50 | 5.00 | 859 |
| Crypto | 5.00 | 4.00 | 6.00 | 850 |
| Crypto | 7.00 | 6.00 | 5.00 | 823 |
| Crypto | 2.00 | 5.00 | 4.00 | 799 |
| Crypto | 4.00 | 5.00 | 9.00 | 797 |
| Crypto | 2.00 | 3.00 | 9.00 | |
| Crypto | 4.00 | 0.00 | 8.00 | |
| Crypto | 8.00 | 6.00 | 5.00 | |
| Crypto | 5.00 | 8.00 | 6.00 | |
| Crypto | 8.00 | 8.00 | 0.00 | |
| Crypto | 8.00 | 5.00 | 8.00 | |
| Crypto | 9.00 | 7.00 | 3.00 | |
| Crypto | 8.00 | 4.00 | 3.00 | |
| Crypto | 2.00 | 4.00 | 5.00 | |
| Crypto | 5.00 | 2.00 | 0.00 | |
| Total | 4.55 | 4.49 | 4.56 | |

Count of Factor by Avenue



Summary

[Introduction](#)[Overview](#)[Investment Behavior](#)[Personalized Recommendations](#)[External Influence](#)[Return-to-Risk Profile](#)[Recommendations](#)[Investor-Specific](#)[Summary](#)

Key Insights:

- Females:** Prefer low-risk assets like PPF and Gold
- Demographic Segmentation:** Males prefer Equity, while PPF and Gold are more evenly chosen across genders.
- Duration Behavior:** Short-term investors prefer Gold and FDs; long-term ones choose PPF and Equity.
- Factor Influence:** Returns and Risk are top factors affecting investment choices.
- Expectation vs Avenue:** High return seekers choose Crypto/Equity; low expectations go for PPF/FD.
- Return-Risk Score:** Aggressive investors dominate and strongly prefer Crypto and Equity.
- Data Security with OLS:** Sensitive financial traits are hidden from public users for privacy.
- Short Duration + High Expectation:** ⚠️ Risky combo