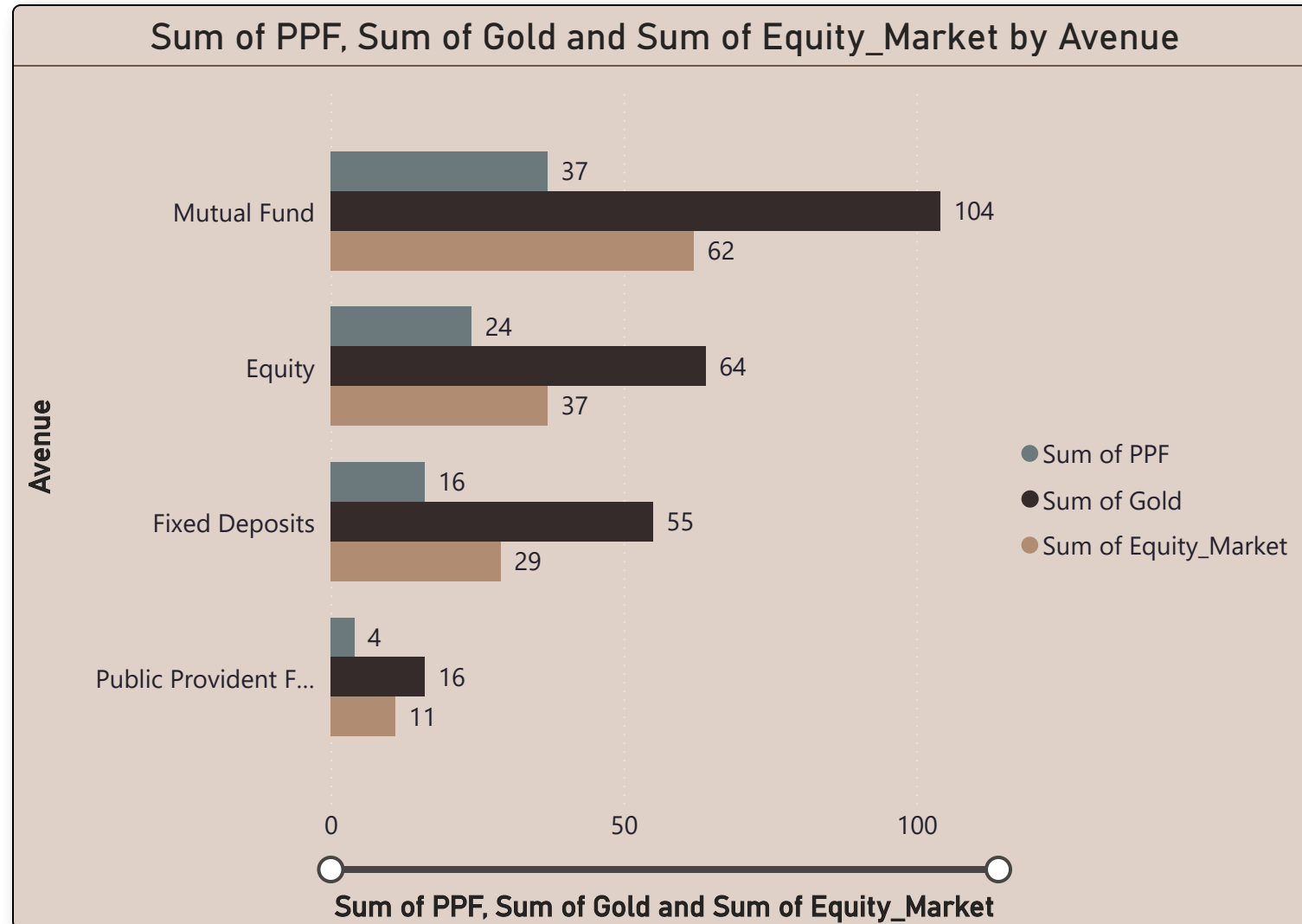


Personalized Investment Strategy Recommendation

Demographic Investment Segmentation



Sum of Mutual_Funds

102

Sum of Fixed_Deposits

143

Purpose of Investment

Purpose, Objective

- ☐ Returns
 - ☐ Capital Appreciation
 - ☐ Income
- ☐ Savings for Future
 - ☐ Capital Appreciation
 - ☐ Growth
- ☐ Wealth Creation
 - ☐ Capital Appreciation
 - ☐ Growth
 - ☐ Income

Filter Based on Gender

- ☐ Female
- ☐ Male

Demographic Investment Segmentation

Sum of Gold

239

Sum of Equity_Market

139

Sum of PPF

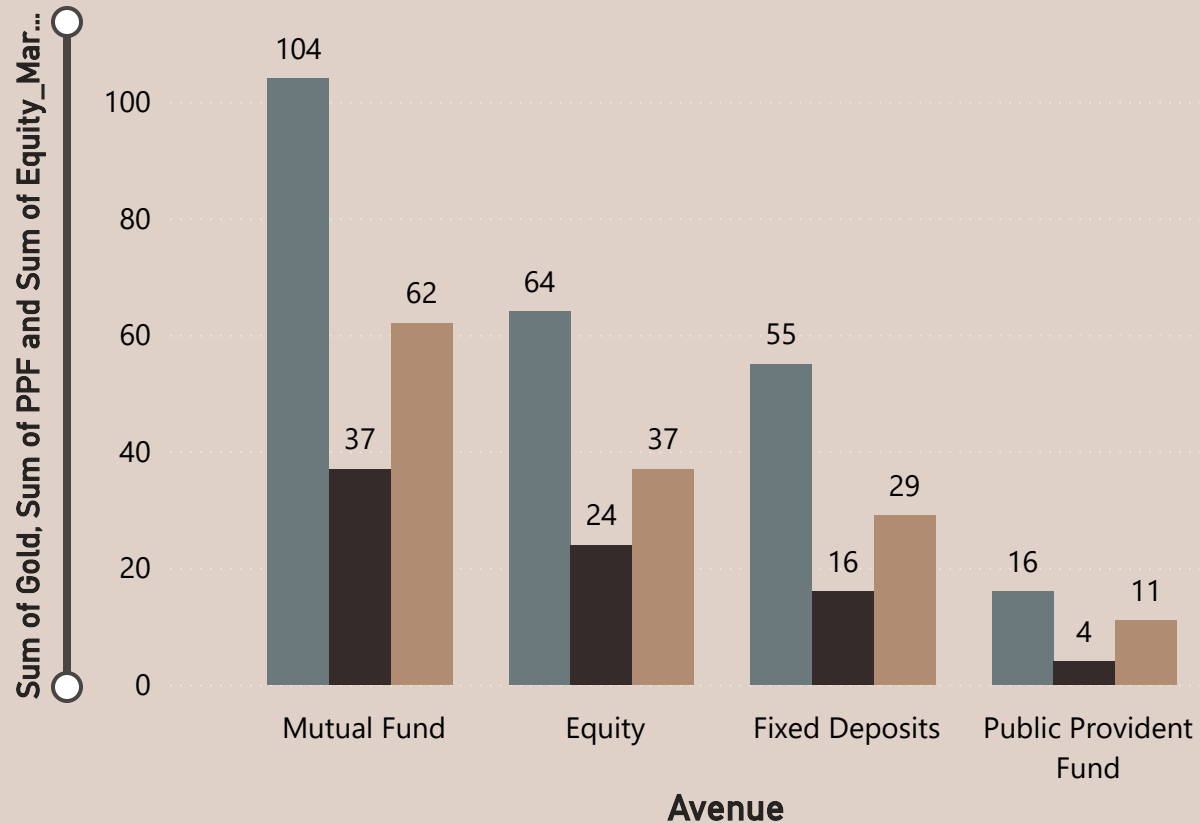
81

Sum of...

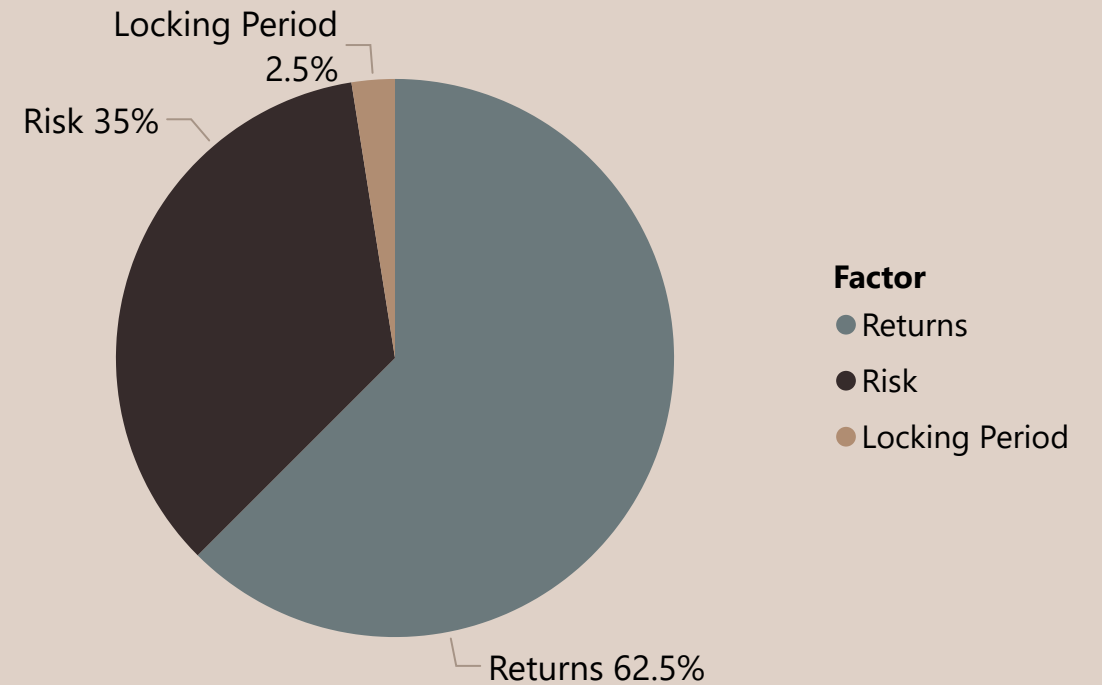
186

Sum of Gold, Sum of PPF and Sum of Equity_Market by Avenue

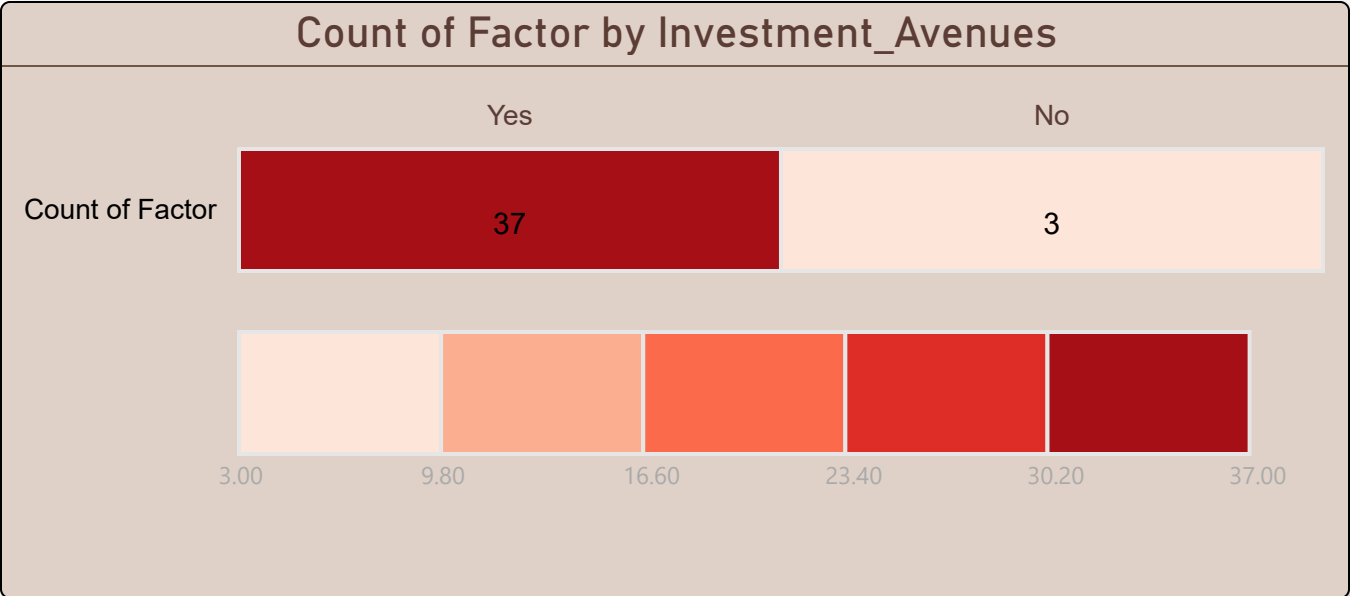
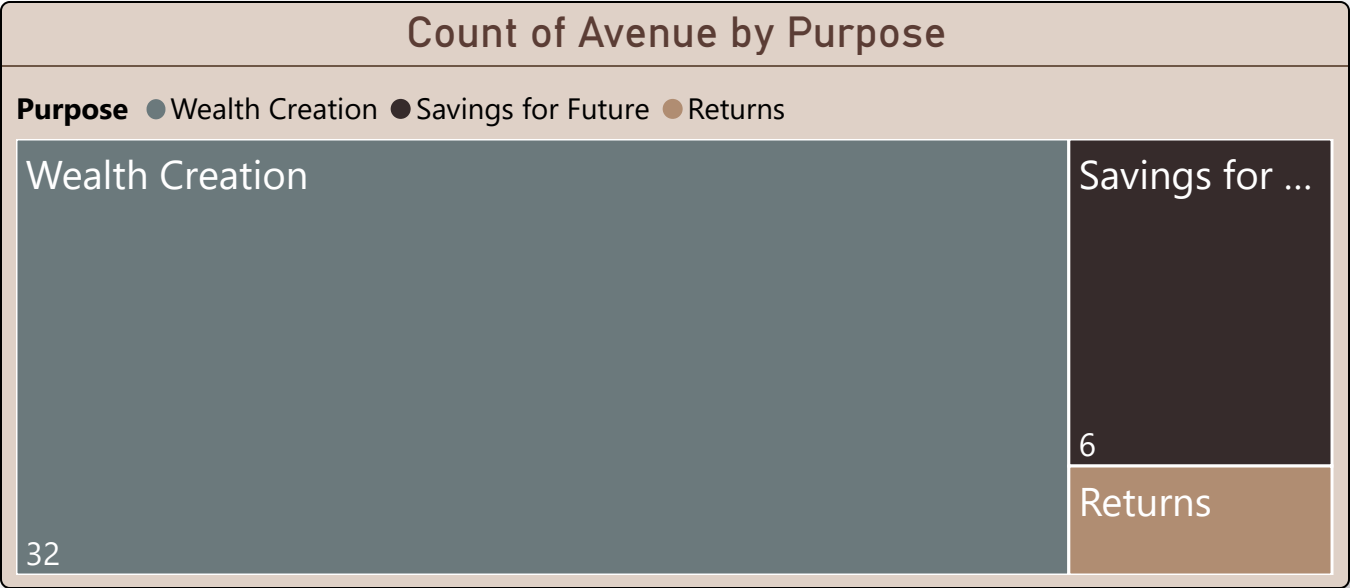
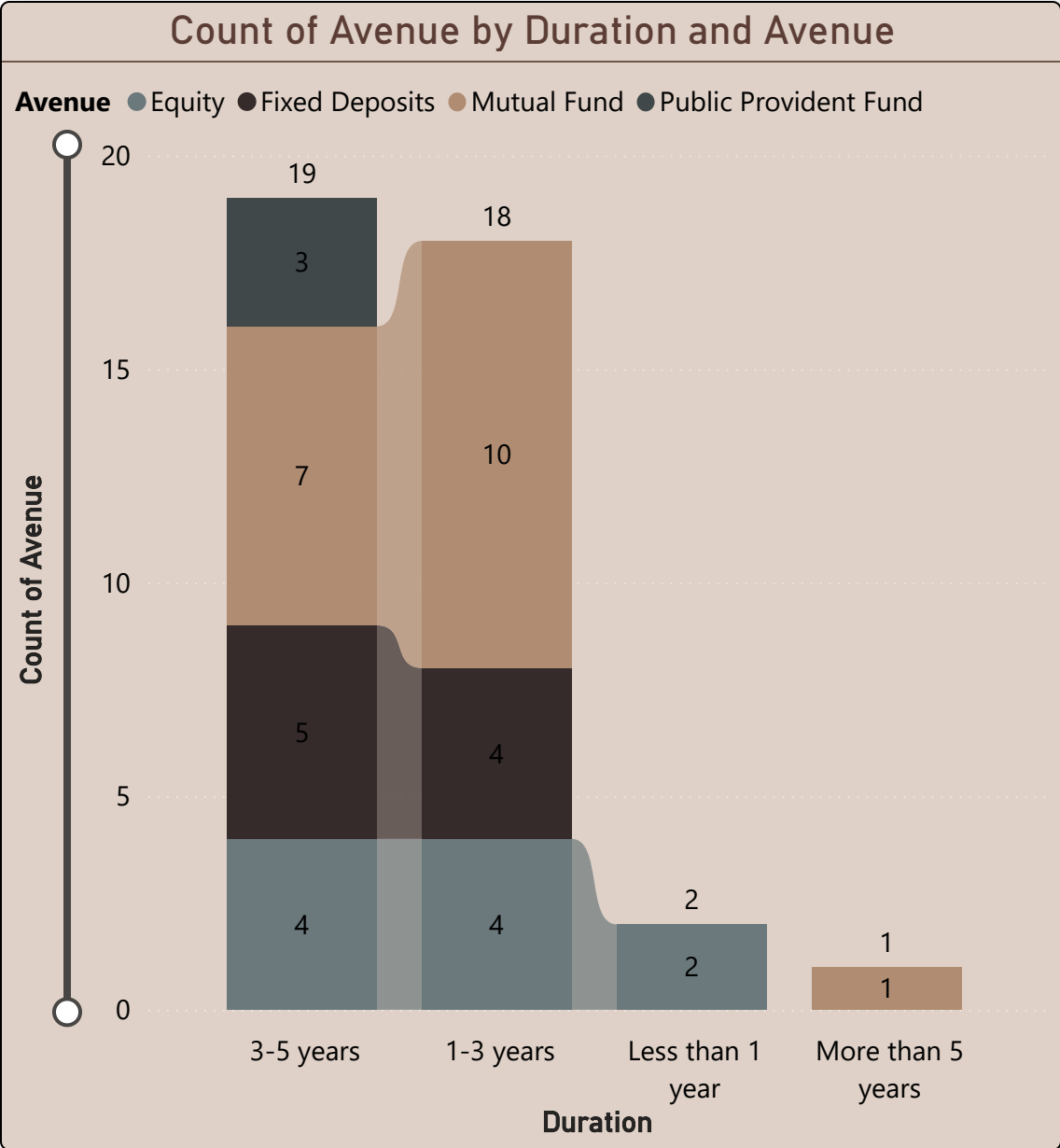
● Sum of Gold ● Sum of PPF ● Sum of Equity_Market



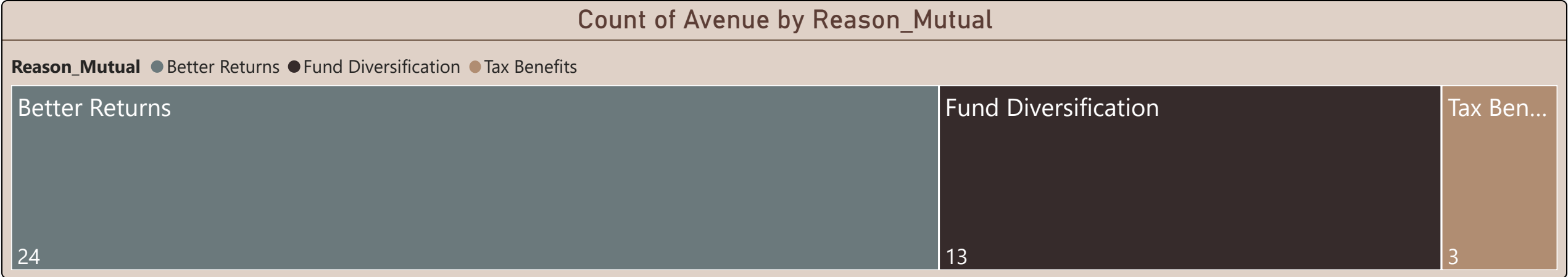
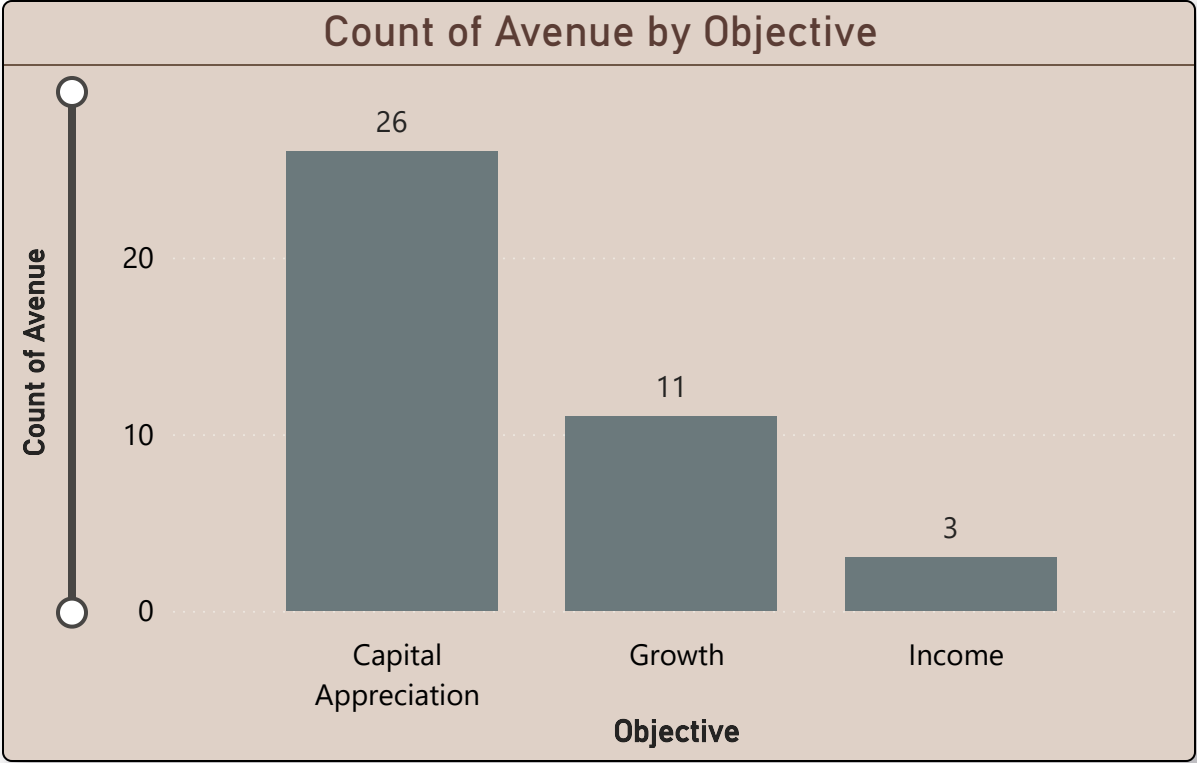
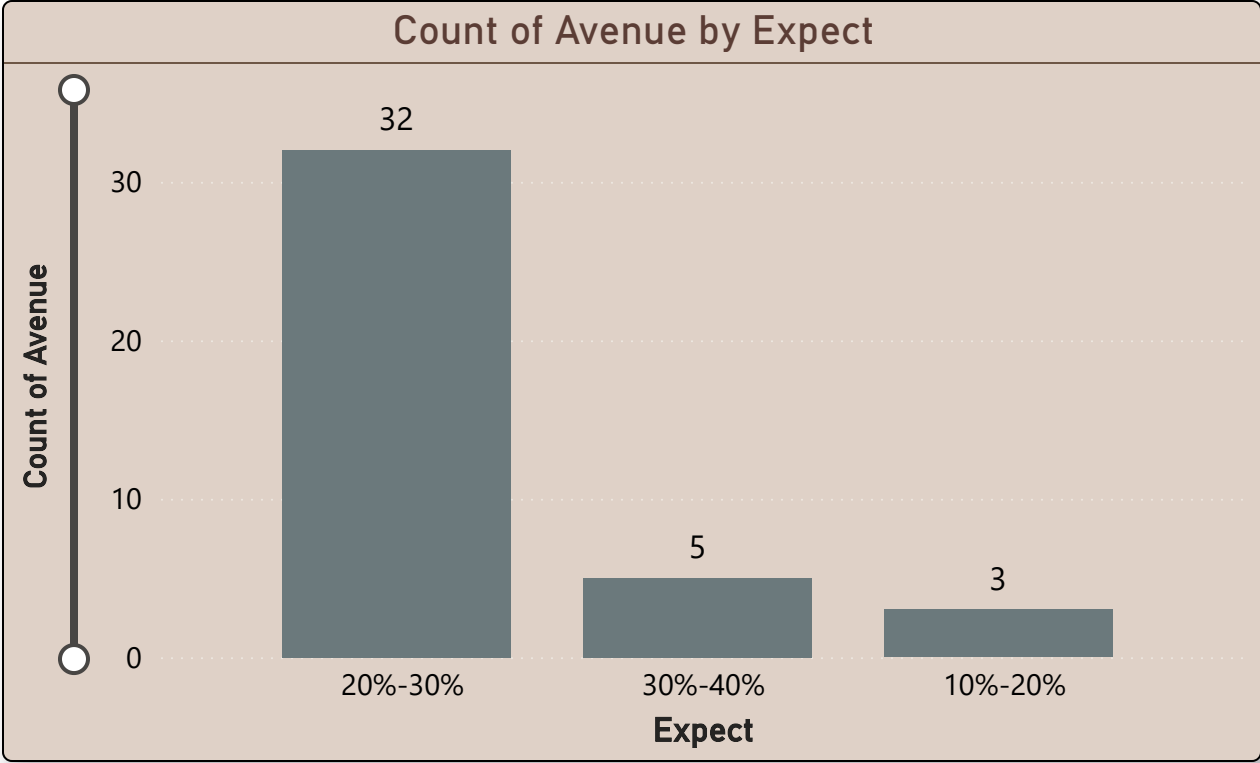
Count of Avenue by Factor



Investment Behavior Insights

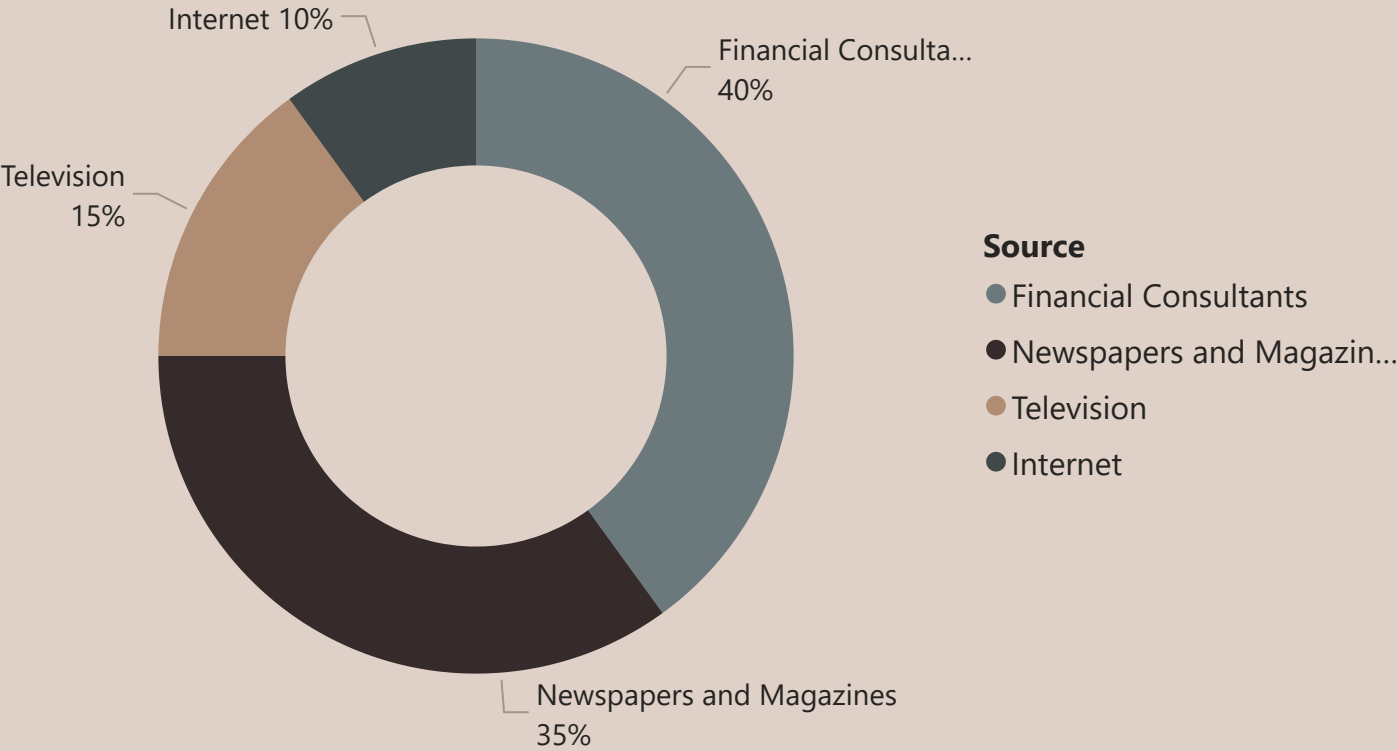


Personalized Strategy & Recommendations



External Influence & Reasoning Summary

Count of Avenue by Source and Source



Expect

10% - 20%

20% - 30%

30% - 40%

Objective

Capital Appreciation

Growth

Income