



# Personalized Investment Strategy Recommendation

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## 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  
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22474

22769

22790

22397

22835

22302

Sum of Equity\_Market

Sum of Gold

Sum of FixedDeposits

Sum of MutualFunds

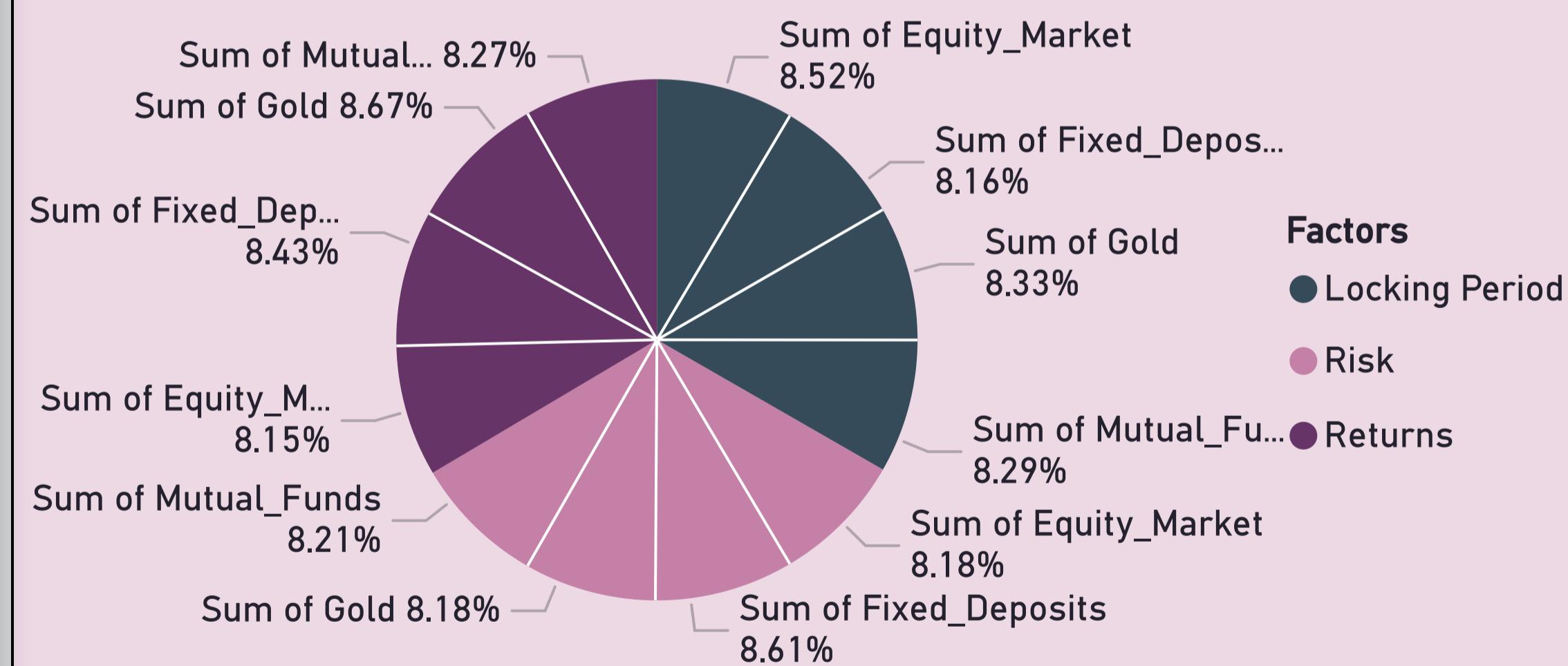
Sum of PPF

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 FixedDeposits, Sum of Gold and Sum of MutualFunds 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

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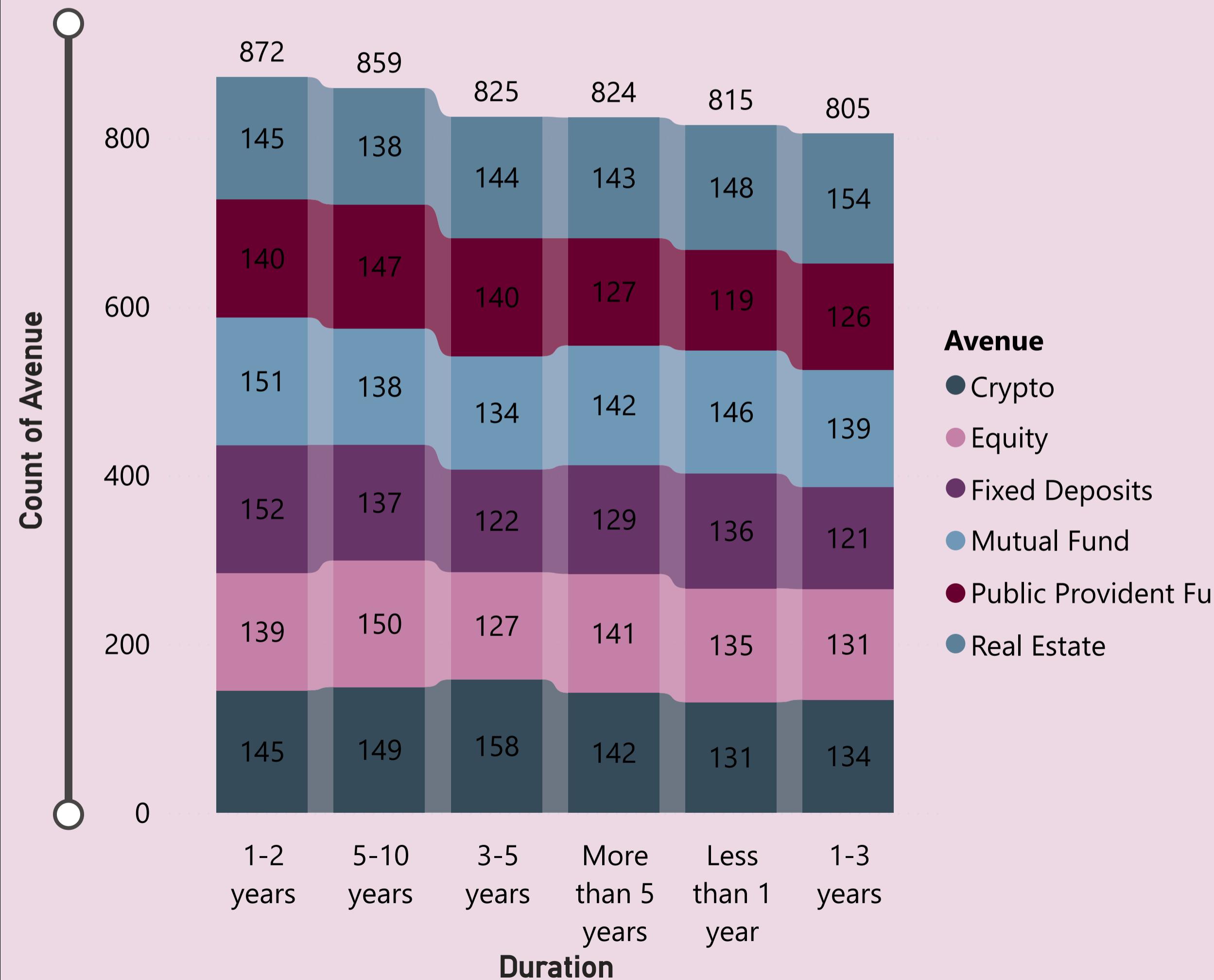
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Count of Avenue by Duration and Avenue



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

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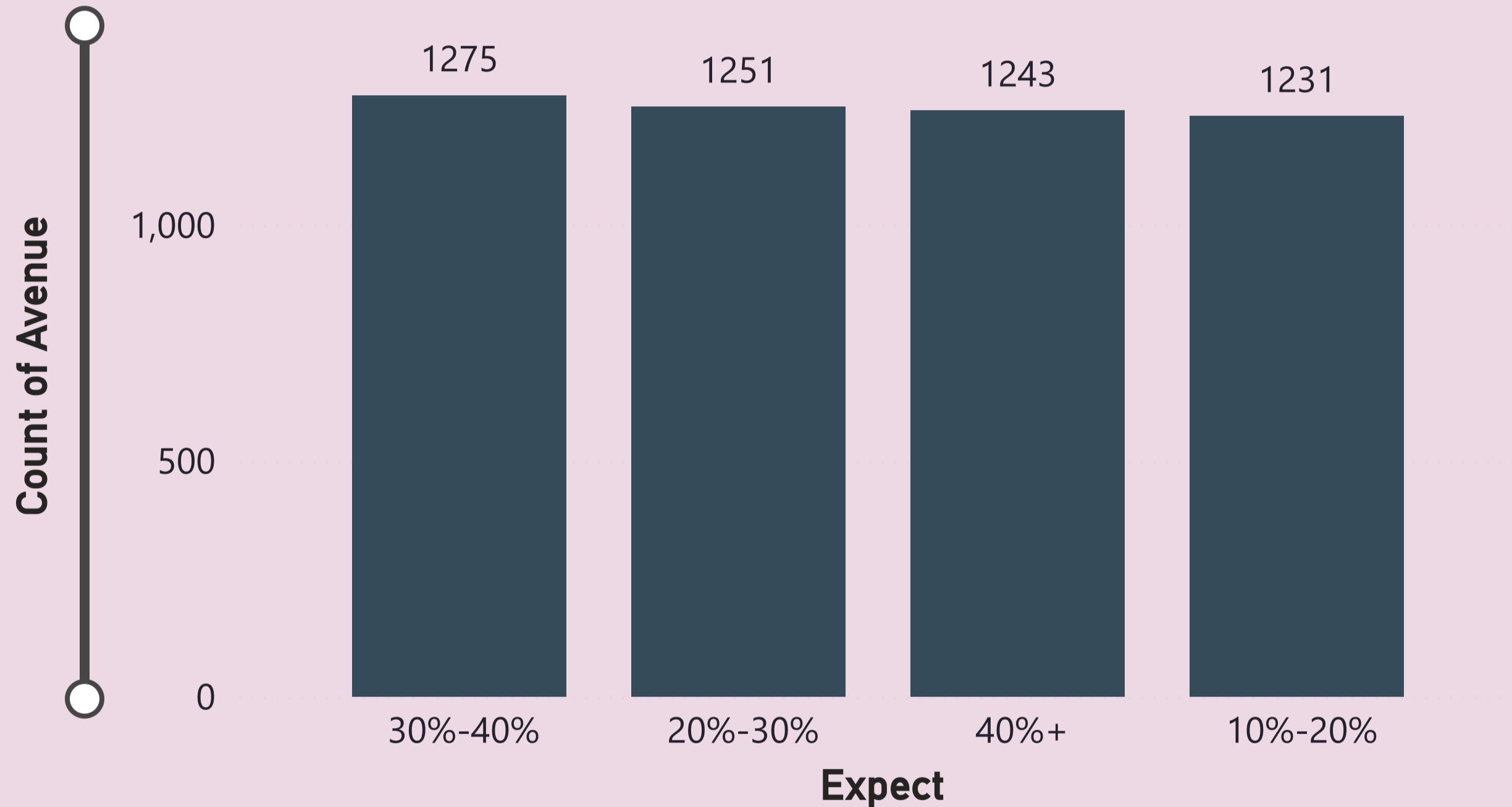
Return-to-Risk Profile

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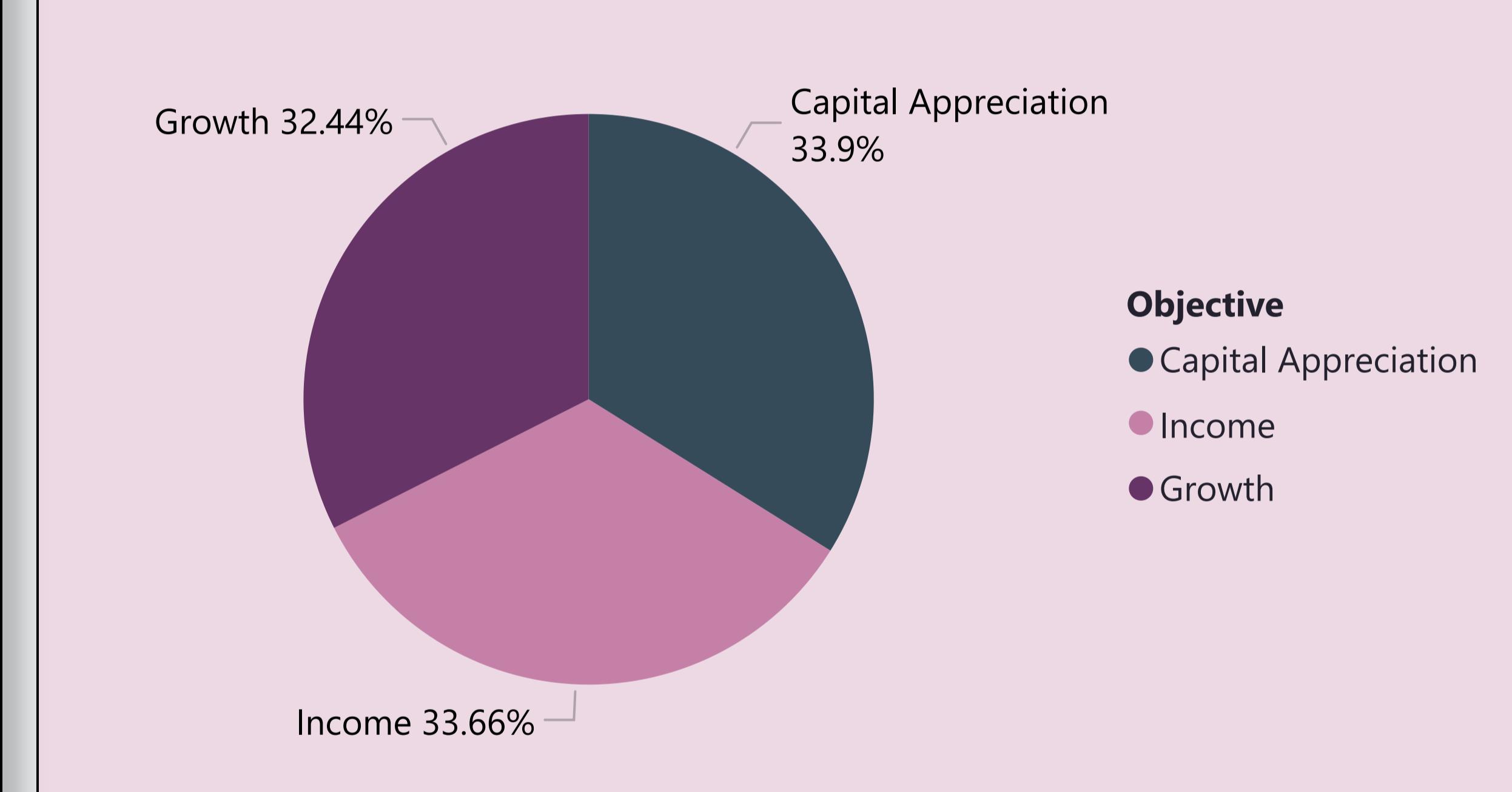
Investor-Specific

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

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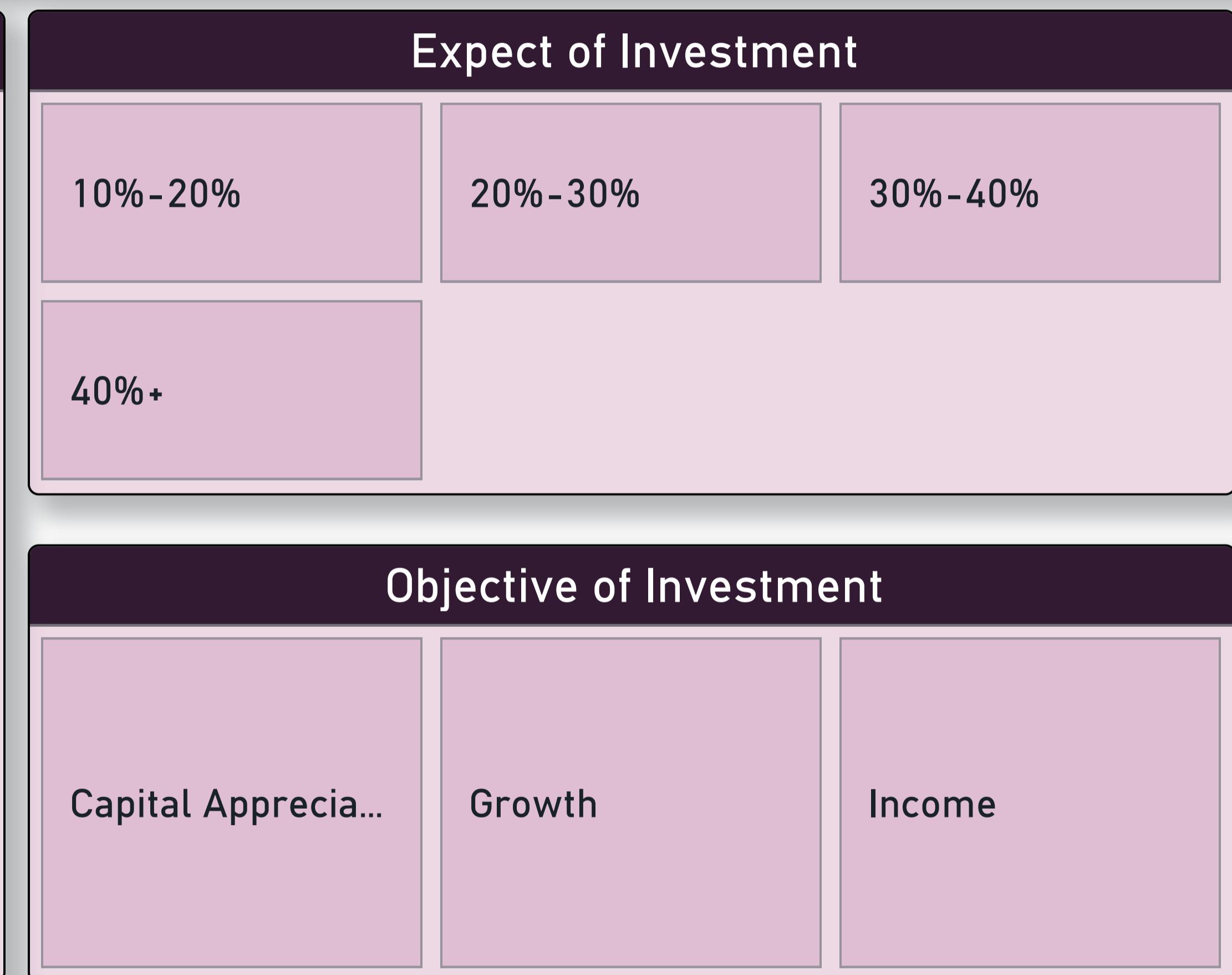
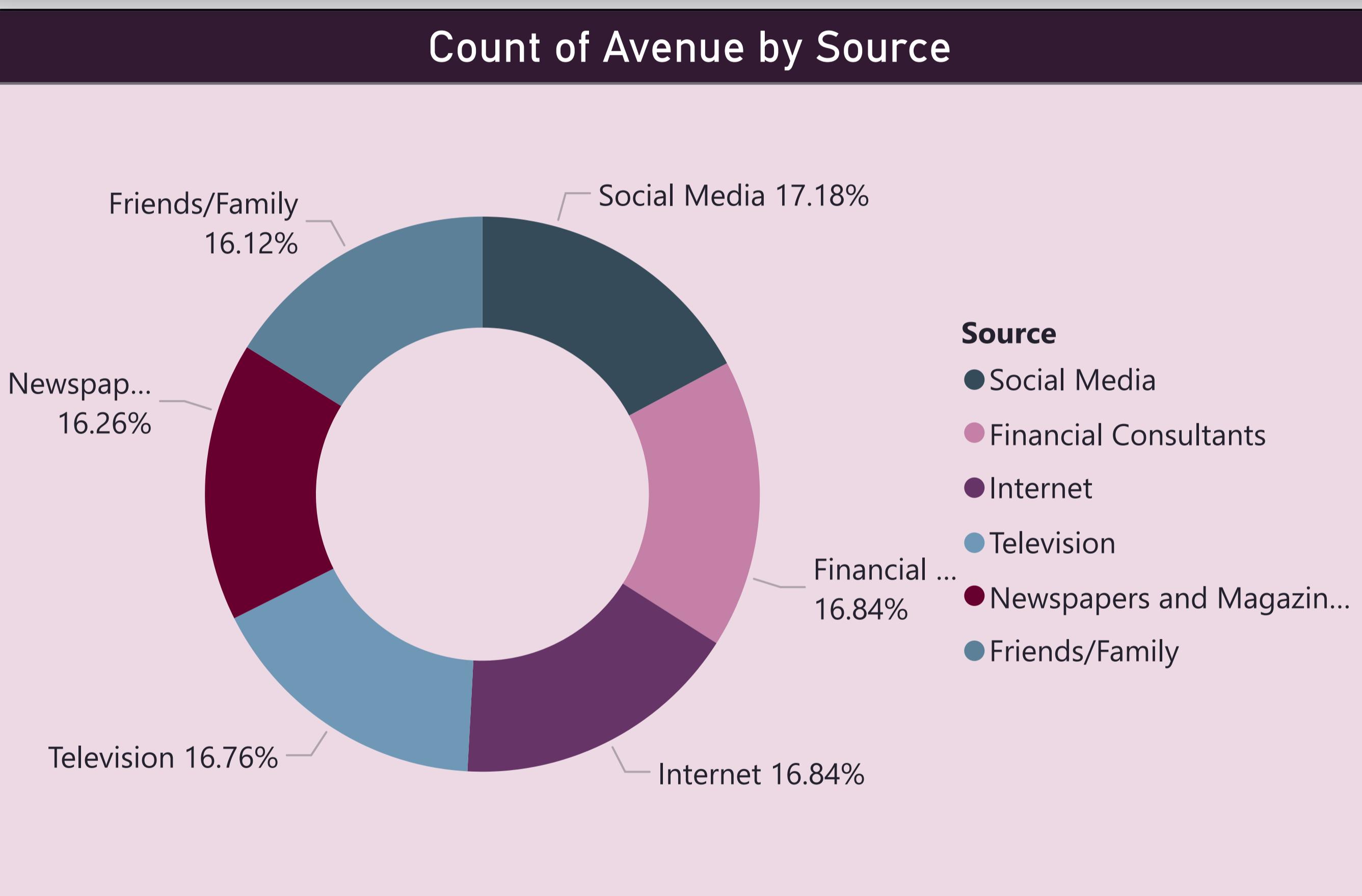
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## Summary

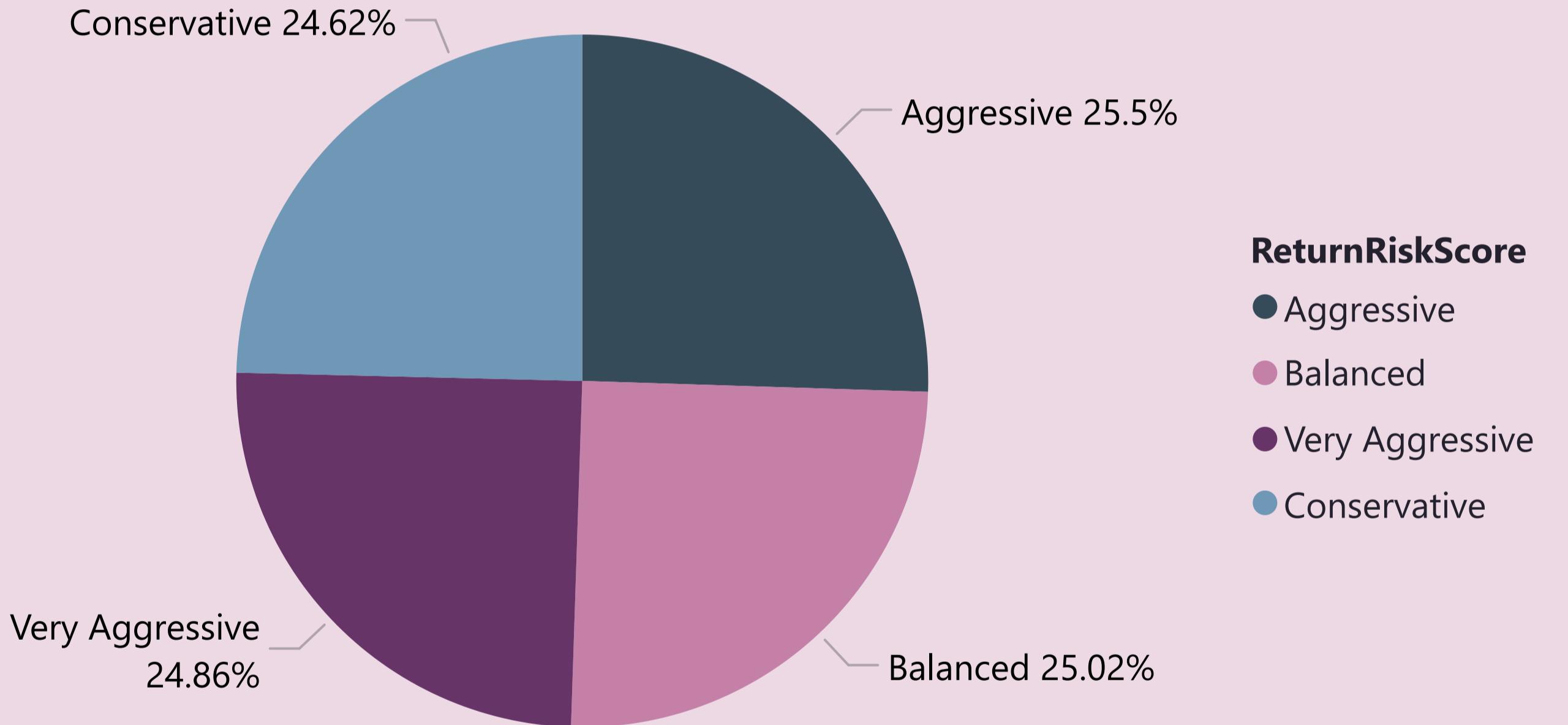
Social Media had the highest Count of Avenue at 859. Friends/Family had the lowest Count of Avenue at 806. Social Media accounted for 17.18% of Count of Avenue.



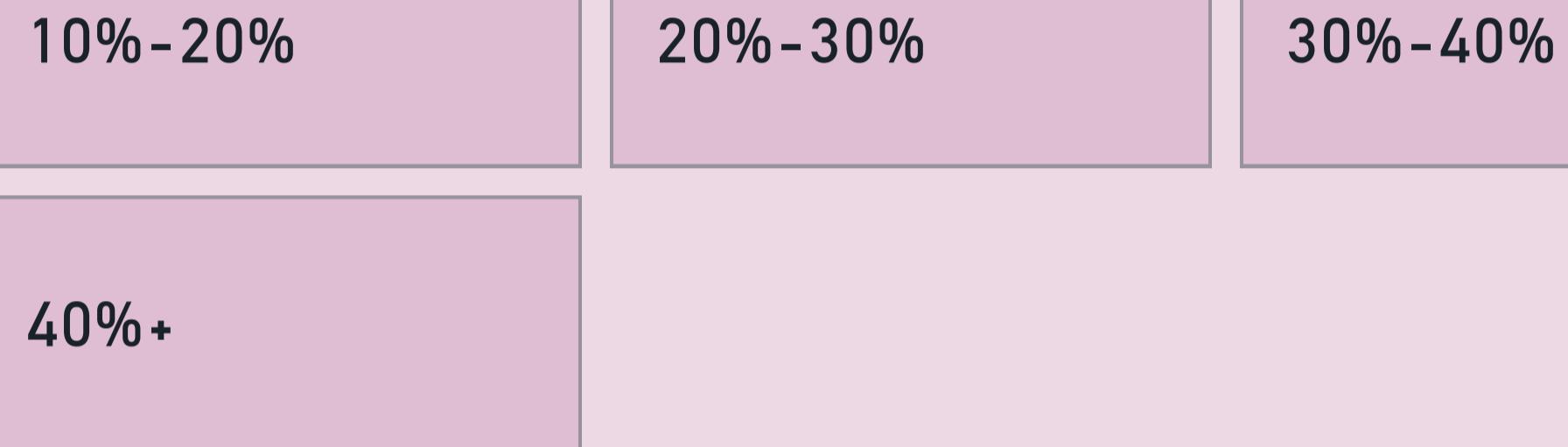
# Return to Risk Profile

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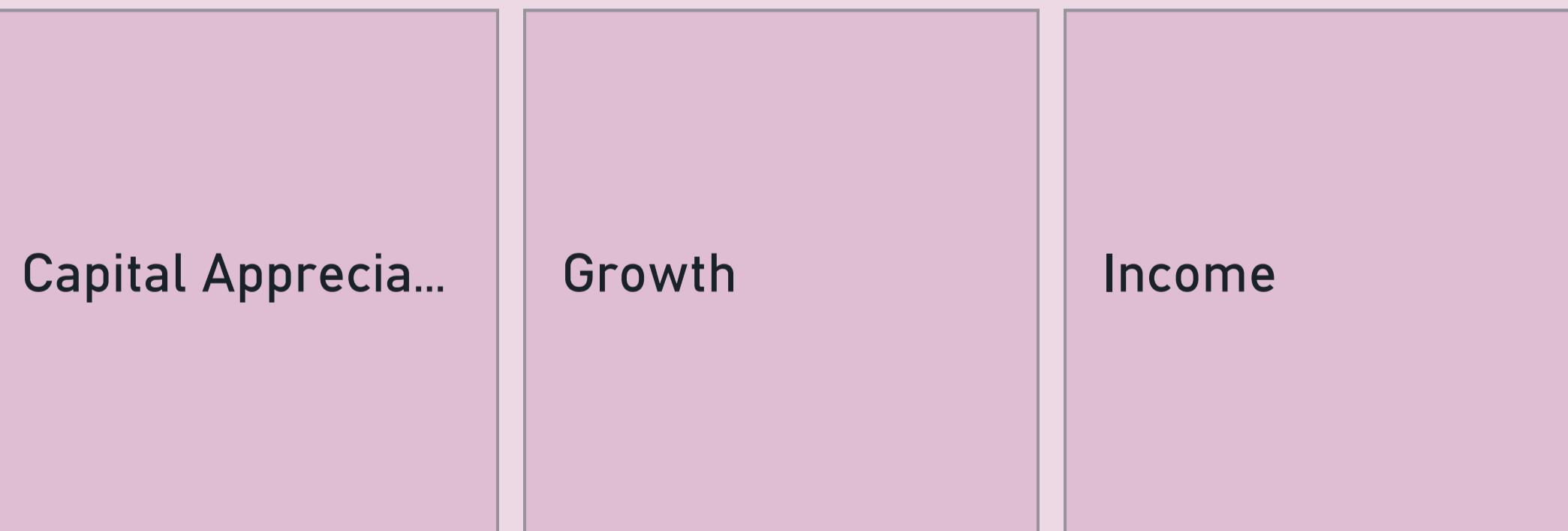
## Count of Avenue by ReturnRiskScore



## Expect of Investment



## Objective of Investment



## 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

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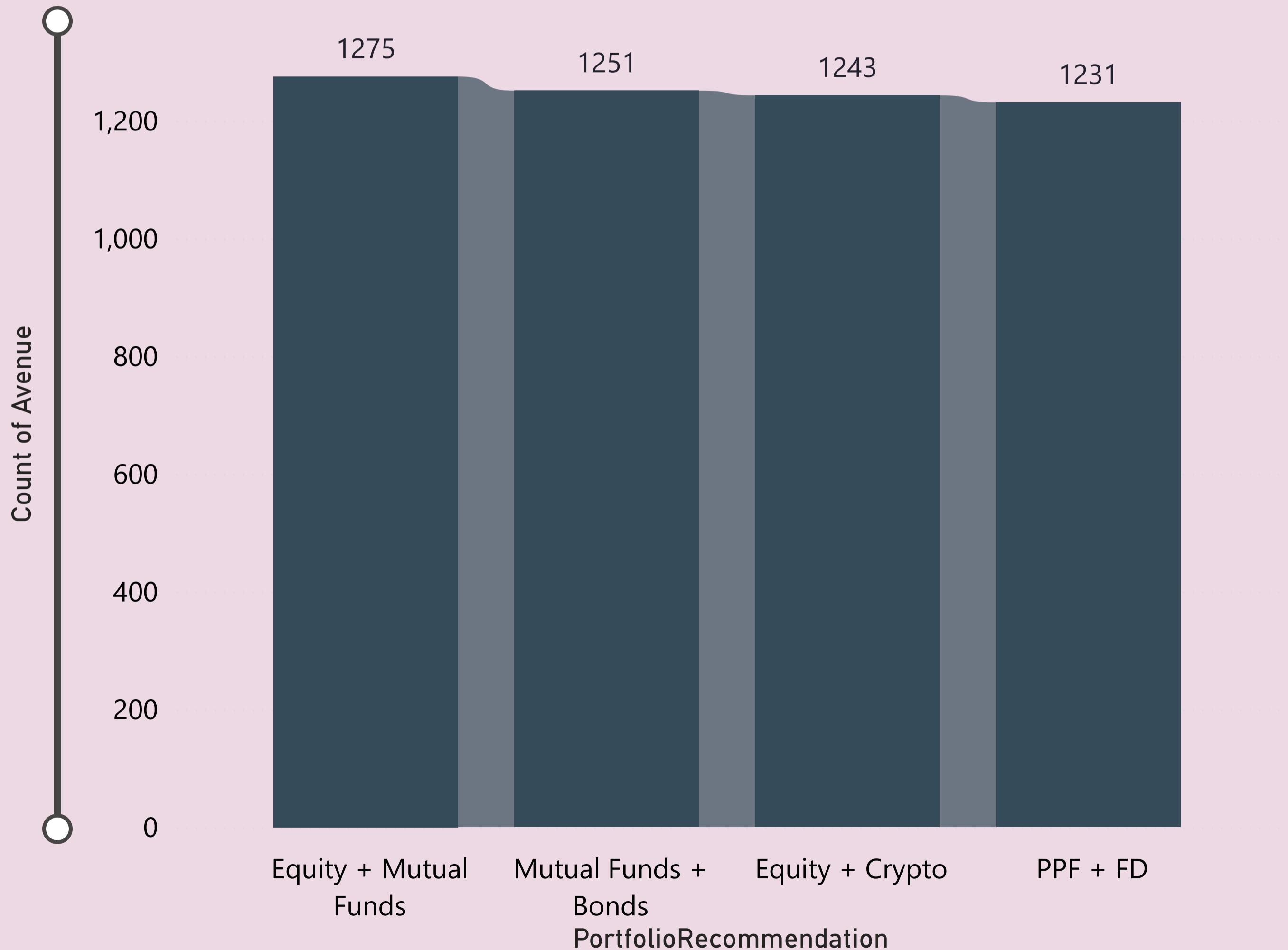
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Count of Avenue by PortfolioRecommendation



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



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Expect

All



Objective

All



Purpose of Investment

All



Age

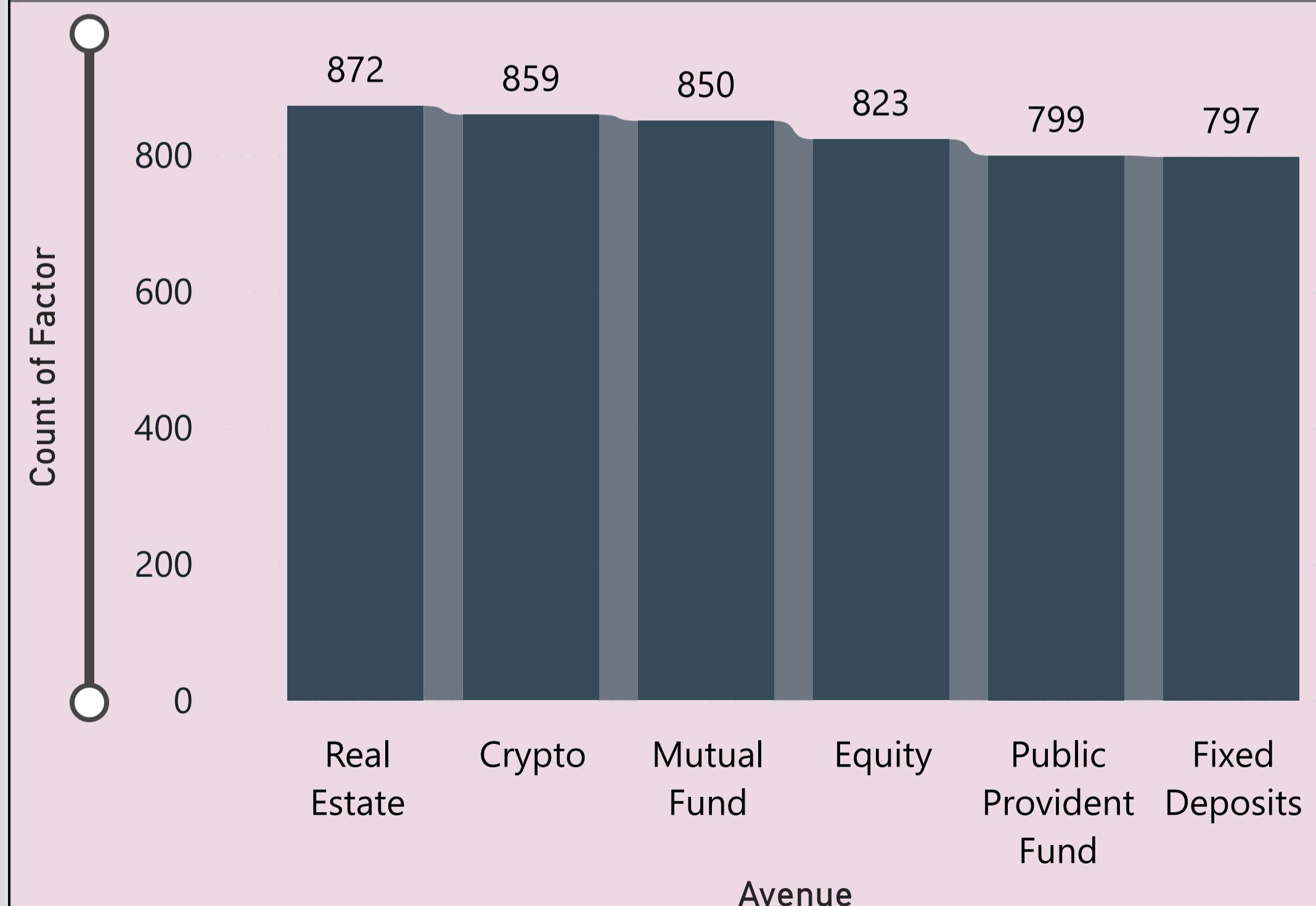
All



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	
<b>Total</b>	<b>4.55</b>	<b>4.49</b>	<b>4.56</b>	

Count of Factor by Avenue



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## 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