

Report On Finance Data

- **Introduction**

It is the dataset with Investment Distributions like Mutual Funds, Equity Market, Debentures, Government Bonds, Fixed Deposits and it also shows the Gender and Age columns like, how many male and female and which age group they belong to and it shows the investment purposes like Wealth Creation, Savings for further purpose, returns and it shows Capital Appreciation, Growth, Income as Investment Objectives and shows some reasons for investing in equity and sources like media, internet, etc. Finally it shows the duration and factors involved in investing.

The main Objectives are: How many people are interested to invest daily, weekly in the stock market and to find how many are there to increase their revenue or savings for their future purpose and to also show objectives of their savings like for Retirement plan, Education, Health care, etc. And to find how many are interested in Capital Appreciation, Dividend in Reason Equity.

The Key Performance Indicators like Count of stock market by investment avenues by gender which shows how many are invested, Purpose by factor in terms of duration which shows how people are ready to invest for their purpose in time, By saving objectives source and expected count which depicts how describes how their objectives by using source, expectation. The main thing is that Mostly with age of 27 years have invested in fixed deposits. Average of Debentures is more than Equity Market, Fixed deposits, Mutual Funds, Government Bonds in Investment Distributions.

- **Data Pre-Processing and Cleaning**

The Preprocessing techniques like data transformation and replacing all null values with some minimum numbers have been done and the dataset mostly contains theoretical fields than numerical fields.

The Calculated columns were mostly not needed for this dataset and if we want to go deeper than we need some calculations which are highly needed to show the deep key performance indicators.

- **Data Modelling**

At first it shows the all theoretical values for the columns like Investment Avenues, Stock Market which contains Boolean values. The Factors which have returns, risk, etc. The duration contains fixed intervals like 1-3 yrs, 3-5 yrs and there are some reasons for why users are investing and reason_equity, reason_fd, reason_mutual, etc. which contains all theoretical values.

The Columns for visualization have been converted into Calculations like Average, maximum and minimum ones and we have percentage calculations when it comes to Average of Debentures is more than Equity Market, Fixed deposits, Mutual Funds, Government Bonds in Investment Distributions.

The Count of measures mainly on the pie chart visualization which have percentage sectors and we have sum of fixed deposits by age and also we considered the reasons for investing in stock market through ribbon chart.

- **Dashboard**

The First Dashboard contains the 4 visualizations, (Column Chart) It shows the stock market investment avenues by gender wise that means how many are ready to invest in the ups and downs, it also shows the huge count of people investing in stock market. Another one shows the pie chart which shows the distribution of Investments like (High)Average of Debentures, Equity Market, Fixed deposits, Mutual Funds, Government Bonds. (Line Chart) Next one shows the People count who invests more duration in stock market mostly people prefer for the medium term investments. Last one (Tree Map) It shows the purpose of people for what they are investing for like Wealth Creation, Savings for future, returns.

The Second Dashboard contains visualizations and Key Performance Indicators, Count of investment avenues by Stock Market by gender shows good count (37 out of 40), Second one shows the count of duration by purpose for each factor which shows how people are investing in time for their purposes based on the factors. Another one, shows the fixed deposits sum by age in the form of donut chart which mainly depicts that people with under 30 years of age has shown more interest in fixed deposits. Last one shows the count of source and expect by saving objectives where majority people choose by returns with 20-30%.

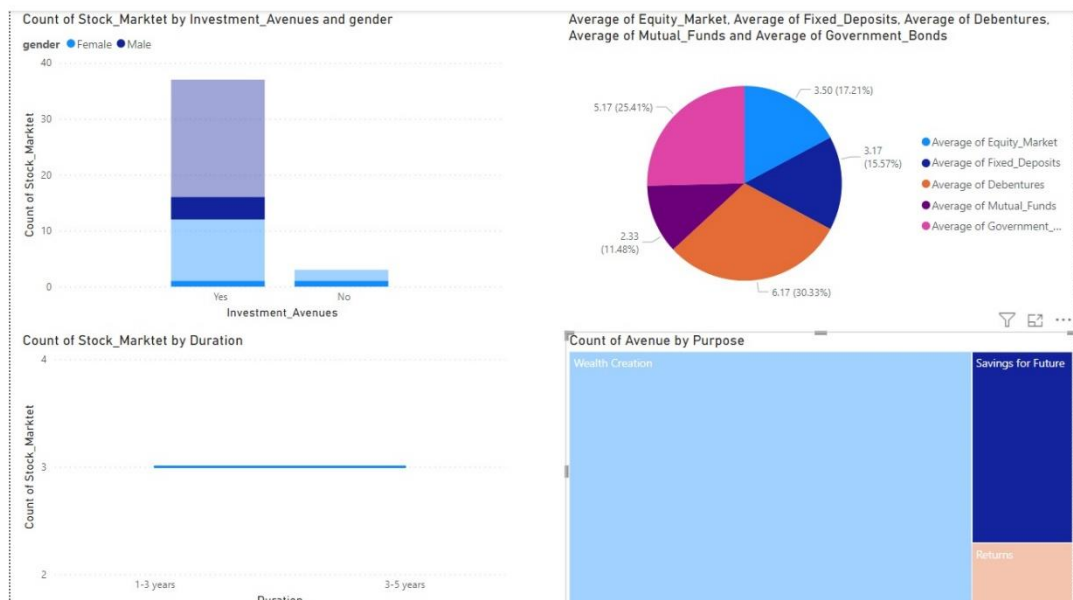
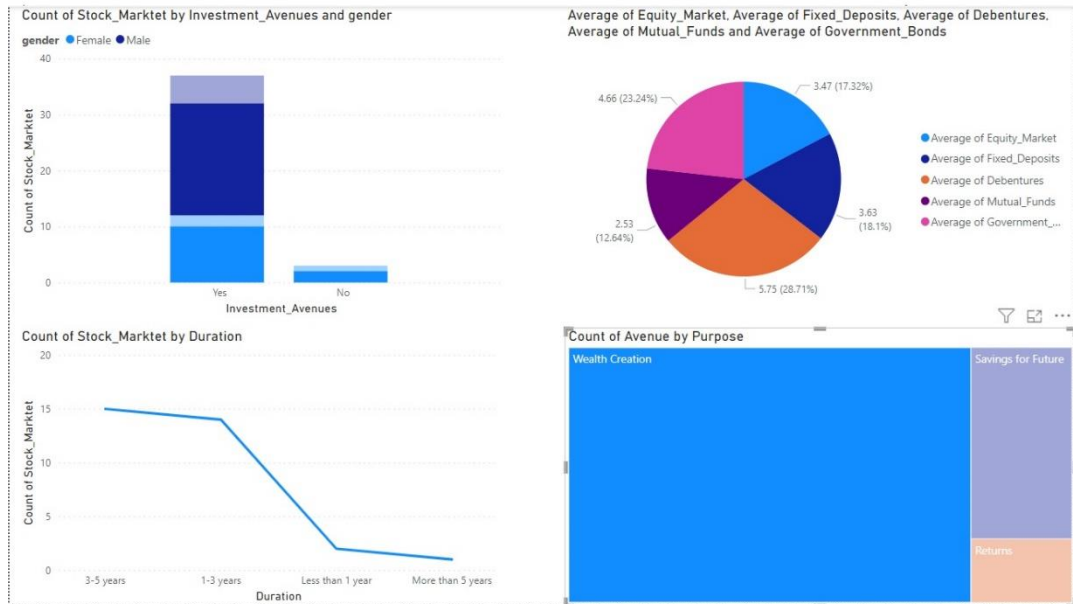
The Third Dashboard contains 4 visualizations, (Stacked area Chart) It shows the count of reason fixed deposit by reason equity where is shows the maximum people invest for capital appreciation. (Clustered bar chart) Another one shows the count of gender by avenue where more people chosen for Mutual fund than equity, fixed deposits, public provident fund. (Ribbon chart) Next one shows the people's age who are investing in stock market by purpose where more people done for wealth creation than savings for future, returns. Last one shows the pie chart which comprises of Average age for what they are savings objectives where Retirement plan more than Health care, Education.

The interactivity is shown where is holds the savings objectives like retirement plan, where if we select one saving objective it shows the behaviour or interactivity of other charts (page 3) and finally each field is related to another in terms of investment and savings objectives, Investment Avenue, Purpose, Factor and all reason fixed deposits, reason equity, reason mutual fund, reason bond. The dashboard's are understandable to all viewers and all key performance indicators are done with the help of finance dataset. The count of avenue by purpose visualisation interacts with all visualisations of the dashboard (page 1).

- **Conclusion**

The Key Performance Indicators (KPIs) solves the confusion that how many are ready to invest in stock market and which age group of people are interested in stepping into stocks and it also shows the awareness of people when they see the sources and factors for better returns in the market. The Investment avenues clearly states that people are ready to invest in stocks of all age groups but most of them are under 30s and it also shows the timeline in which they invested based on factors and purpose of their own needs. The last one states that savings objectives and their sources are almost related when they expect good results from their individual portfolio and on their own stocks. This report states the visualisation importance and KPIs.

Screen Shots



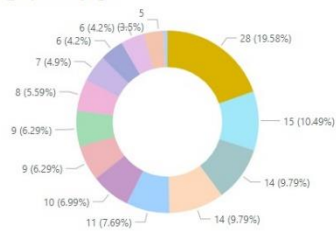
Count of Stock_Market and Count of gender by Investment_Avenues

Count of Duration and Count of Purpose by Factor

7✓
Goal: 7 (+0%)

7✓
Goal: 7 (+0%)

Sum of Fixed_Deposits by age



age

- 27
- 31
- 29
- 34
- 21
- 24
- 28
- 30
- 25

Count of Source and Count of Expect by What are your savings objectives?

3✓
Goal: 3 (+0%)

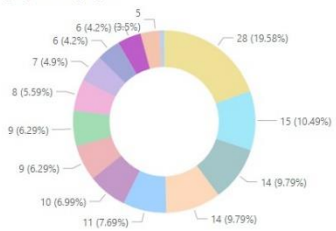
Count of Stock_Market and Count of gender by Investment_Avenues

Count of Duration and Count of Purpose by Factor

2✓
Goal: 2 (+0%)

1✓
Goal: 1 (+0%)

Sum of Fixed_Deposits by age



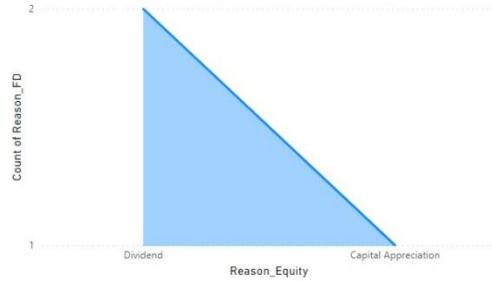
age

- 27
- 31
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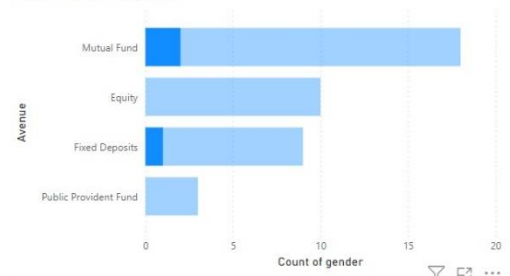
Count of Source and Count of Expect by What are your savings objectives?

2✓
Goal: 2 (+0%)

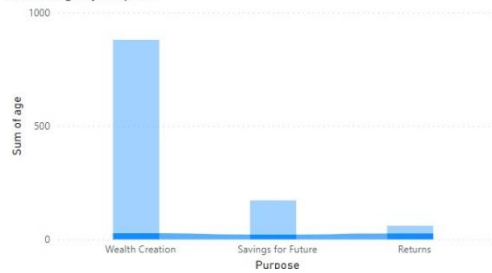
Count of Reason_FD by Reason_Equity



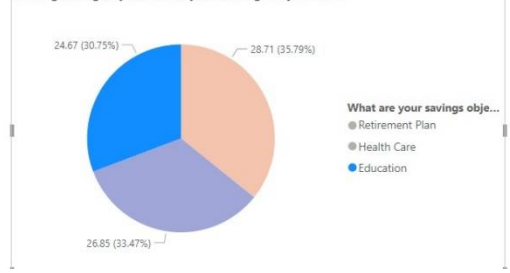
Count of gender by Avenue



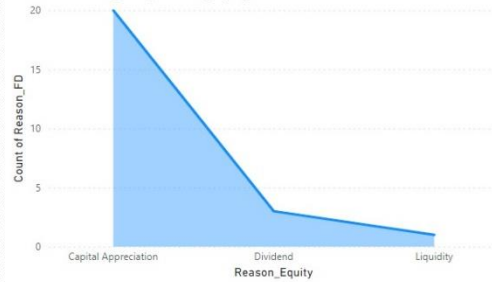
Sum of age by Purpose



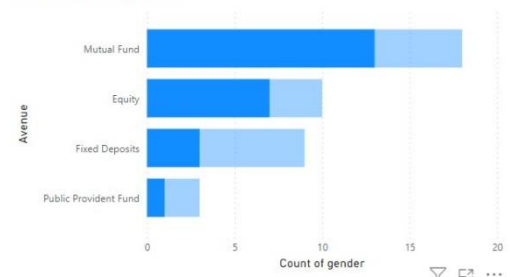
Average of age by What are your savings objectives?



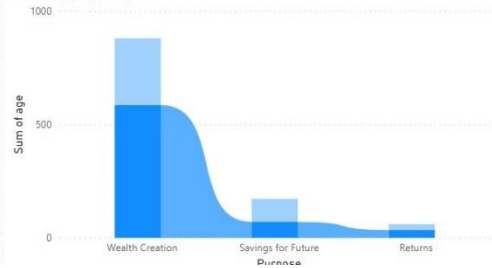
Count of Reason_FD by Reason_Equity



Count of gender by Avenue



Sum of age by Purpose



Average of age by What are your savings objectives?

