1️⃣ Overview

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Project Brief

Cardinal Stone's executive team is looking to launch a new investment product and wants to analyse the performance of existing products in the market.

As a Data Analyst, your task is to gather relevant data from various sources, clean and organize the data, and identify trends and patterns. Create a visual report and dashboard that highlights key findings, such as risk-adjusted returns, market share, and customer satisfaction.

This information will help the company make data-driven decisions to improve the product and its marketing strategies.

Potential Questions to Explore

- What are the top-performing investment products in the market, based on risk-adjusted returns, over the past 1, 3, and 5 years?
- How do the risk levels of different investment products correlate with their performance?
- Are there any seasonal or cyclical trends in the performance of investment products that can be leveraged for marketing strategies?
- Which investment products have the highest customer satisfaction ratings? Are there any correlations between customer satisfaction and the performance of the investment products?
- How do the fees (management and expense fees) of different investment products impact their overall performance and customer satisfaction rate?

Feel free to come up with your own insights!

Dataset

- European funds dataset from Morningstar

The Process

1. **Data Collection and Preparation:**
    1. Download the dataset from the provided Kaggle link.
    2. Identify relevant data sources to supplement the dataset for additional insights (e.g., market data, customer demographics, etc.).
    3. Import the datasets into a data analysis tool or programming environment, such as Excel, R, or Python.
2. **Data Cleaning and Preprocessing:**
    1. Clean the data by handling missing values, removing duplicates, and correcting inconsistencies.
    2. Convert data types if necessary and ensure data is in the appropriate format for analysis.
    3. Merge or join additional data sources with the primary dataset.
3. **Exploratory Data Analysis (EDA):**
    1. Generate summary statistics and visualizations to get a better understanding of the data.
    2. Identify trends, patterns, and correlations between variables.
    3. Formulate hypotheses to answer the questions listed above.
4. **Data Analysis:**
    1. Conduct deeper analyses, such as regression, clustering, or time series analysis, to validate hypotheses and answer the questions.
    2. Identify key performance indicators (KPIs) to focus on for the visual report and dashboard.
5. **Data Visualization and Reporting:**
    1. Create clear and effective visualizations to represent the key findings and insights.
    2. Design a dashboard to display the KPIs, trends, and patterns identified during the analysis.
    3. Prepare a comprehensive report that summarizes the findings, provides recommendations, and supports decision-making for the new investment product.

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