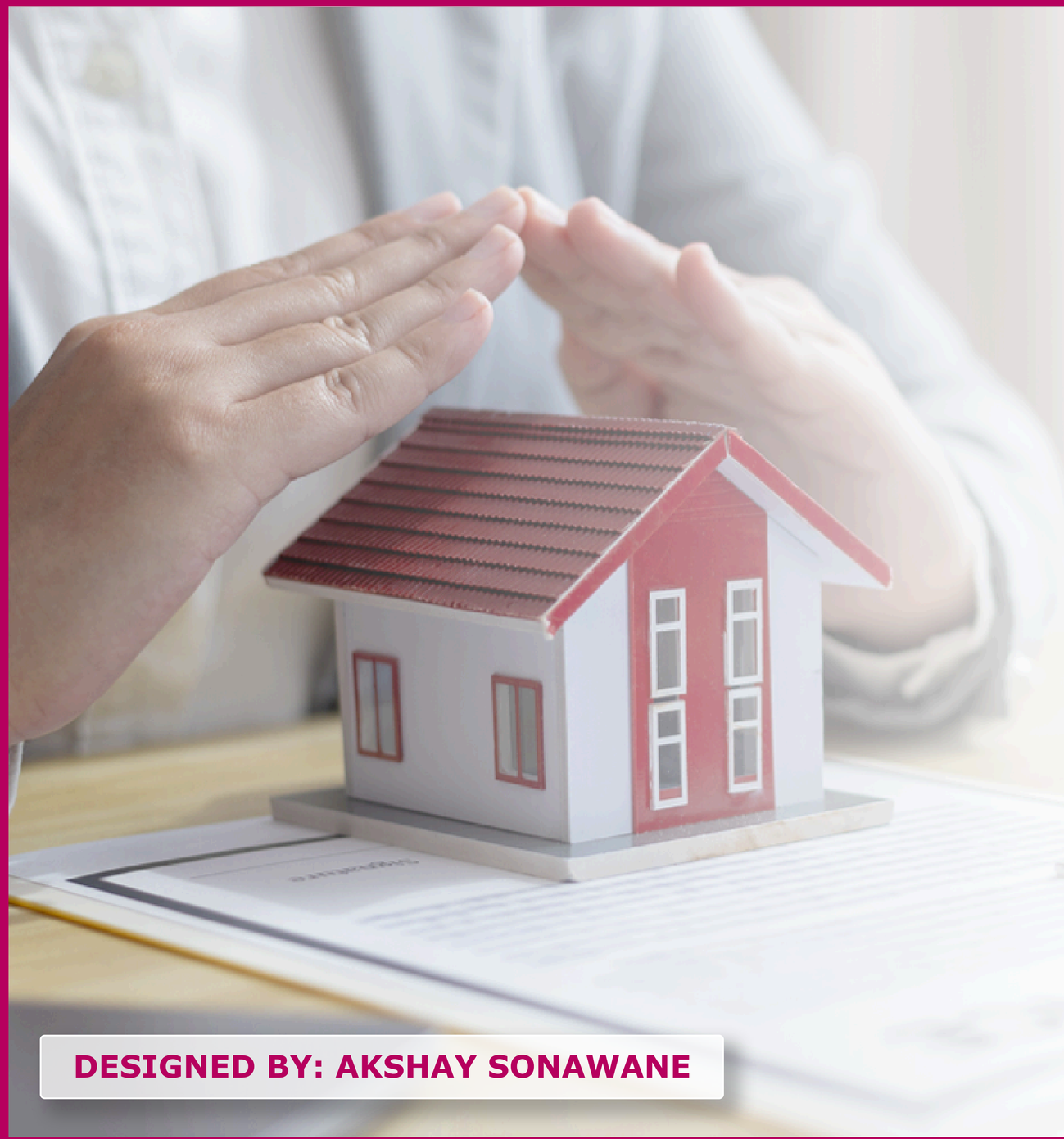

# SHIELD INSURANCE ANALYSIS

## SALES & INSIGHTS REPORT

DESIGNED BY: AKSHAY SONAWANE

# INTRODUCTION

Shield Insurance is a growing player in the Indian insurance sector, offering a wide range of **target-oriented policies** tailored to meet the needs of different customer segments. Operating across major cities such as **Delhi, Mumbai, and other key markets**, the company reaches its customers through multiple sales channels, including **agents, mobile apps, and websites**.
With policies designed to **cover all age groups**, Shield Insurance ensures that every customer—from young professionals to senior citizens—finds the right protection plan. The company's focus is not only on expanding reach but also on creating value-driven solutions that promote financial security and trust.

# PROBLEM STATEMENT

Shield Insurance needed a clear, comprehensive view of business performance with insights on:
**Customers & Revenue –** totals, daily growth, and month-on-month trends.

**Segmentation –** by city, age group, and sales mode to identify strong vs. weak areas.

**Comparison & Drill-Down –** ability to switch between customer and revenue trends, apply filters, and analyze performance at a detailed level.

**Focused Analysis –** dedicated pages for sales mode and age group, highlighting settlement patterns, policy preferences, and channel effectiveness.

# SHIELD INSURANCE ANALYSIS

## Overview

The **Overview** gives a unified snapshot of customer growth, revenue trends, and demographic splits.

It helps leaders monitor key metrics, analyze customer patterns across cities and age brackets, and spot new opportunities through data-driven insights.

## Sales Mode View

The **Sales Mode View** explains how various sales channels impact revenue and customer acquisition.

It compares performance across **Agents, Apps &** showing percentage shares and monthly movement.

This view guides teams in recognizing and fine-tuning strategies for higher impact.

## Age Group View

The **Age Group View** uncovers how customers of different ages engage with policies and sales platforms.

It focuses on **customer distribution, policy choices, & revenue contributions.**

By identifying demographic shifts, this view supports precise targeting, smarter product positioning, and stronger segmentation.

## FAQ

Let's continue the conversation beyond this presentation.

Reset Filters

Week No: All

City: All

Age Group: All

Month: All

Policy ID: All

## Revenue

| Revenue | LM | % Change |
|---|---|---|
| 989M | NA | NA |

## Customers

| Customers | LM | % Change |
|---|---|---|
| 27K | NA | NA |

## Daily Customer Growth

| DCG | LM | % Change |
|---|---|---|
| 148.29 | NA | NA |

## Daily Revenue Growth

| DRG | LM | % Change |
|---|---|---|
| 5.47M | NA | NA |

Abbreviation:
LM: Last Month

SHIELD INSURANCE

# Overview

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Revenue | Customer

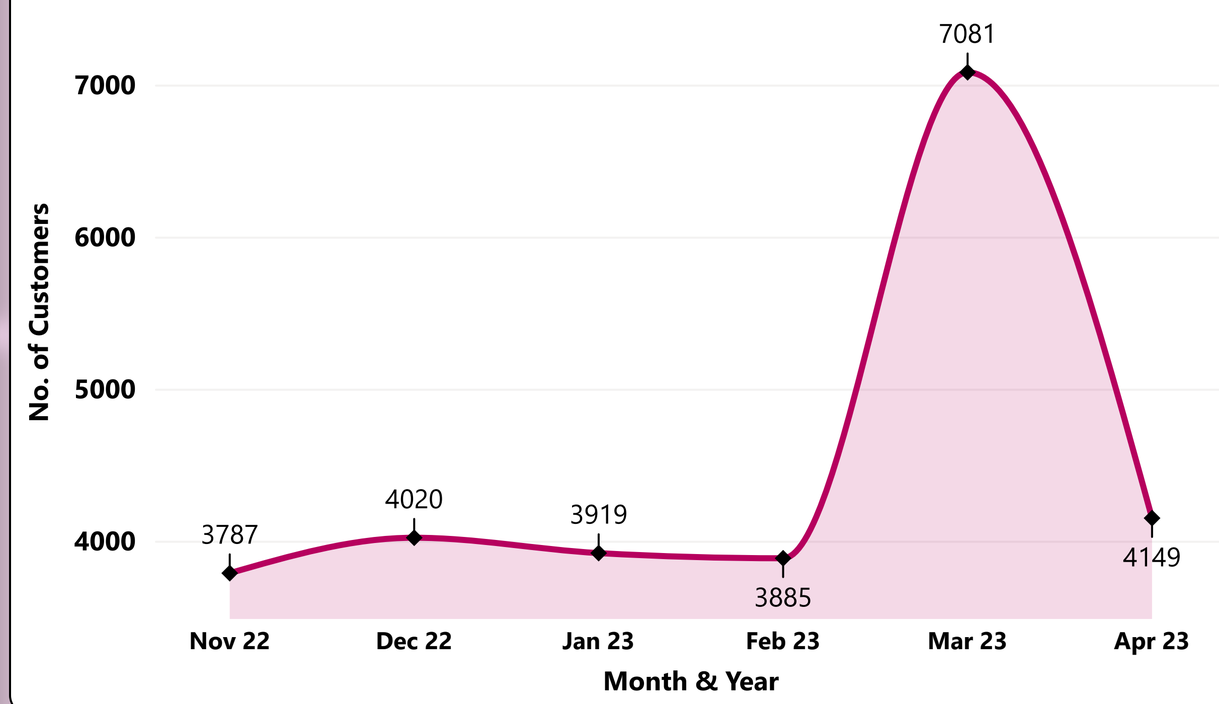
## City-Age Wise Split Analysis

| City | Customers | Revenue |
|---|---|---|
| Total | 26841 | 989.25M |
| Chennai | 2966 | 106.31M |
| Delhi NCR | 11007 | 401.57M |
| Hyderabad | 4340 | 160.52M |
| Indore | 2096 | 81.35M |

## Sales Mode Split Analysis

| Sales Mode | Customers | Revenue |
|---|---|---|
| Offline-Agent | 14873 | 550.76M |
| Offline-Direct | 4256 | 152.91M |
| Online-App | 4302 | 160.97M |
| Online-Website | 3410 | 124.62M |
| Total | 26841 | 989.25M |

## Month Wise Customer Distribution




## Age Gap Split Analysis

| Age Group | Customers | Revenue |
|---|---|---|
| 31-40 | 10460 | 311.13M |
| 41-50 | 6031 | 226.53M |
| 51-65 | 3077 | 165.62M |
| 26-30 | 2799 | 51.31M |
| 18-25 | 2239 | 30.74M |
| 65+ | 2235 | 203.92M |
| Total | 26841 | 989.25M |

## Policy ID Split Analysis

| Policy ID | Customers | Revenue |
|---|---|---|
| POL1048HEL | 1668 | 167.86M |
| POL2005HEL | 1968 | 324.26M |
| POL3309HEL | 3829 | 55.92M |
| POL4321HEL | 4434 | 25.47M |
| POL4331HEL | 3735 | 33.50M |
| POL5319HEL | 3329 | 69.60M |
| Total | 26841 | 989.25M |

## City Wise Split Analysis

| City | Customers | Revenue |
|---|---|---|
| Chennai | 2966 | 106.31M |
| Delhi NCR | 11007 | 401.57M |
| Hyderabad | 4340 | 160.52M |
| Indore | 2096 | 81.35M |
| Mumbai | 6432 | 239.51M |
| Total | 26841 | 989.25M |

Reset Filters

Week No: All

City: All

Age Group: All

Month: All

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SHIELD INSURANCE

# Sales Mode View

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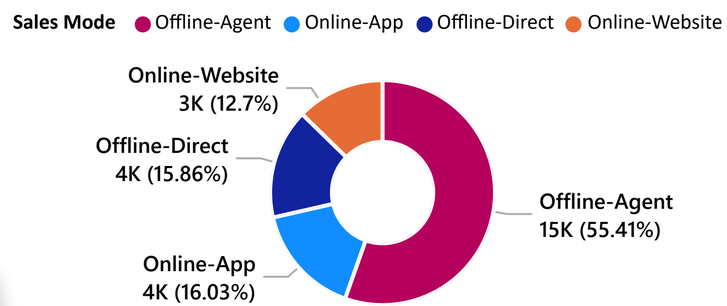
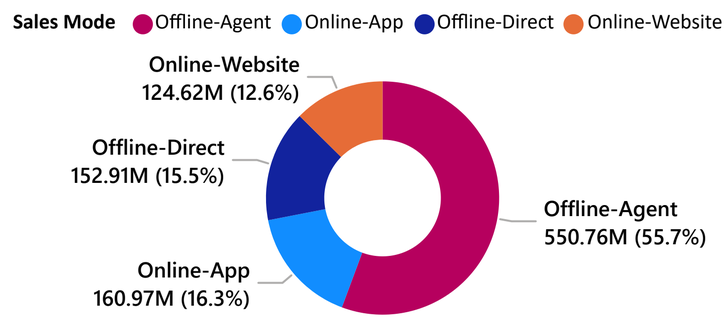
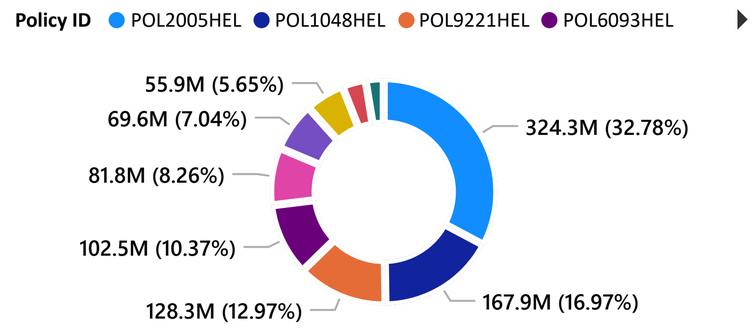
## Sales Mode vs Customers



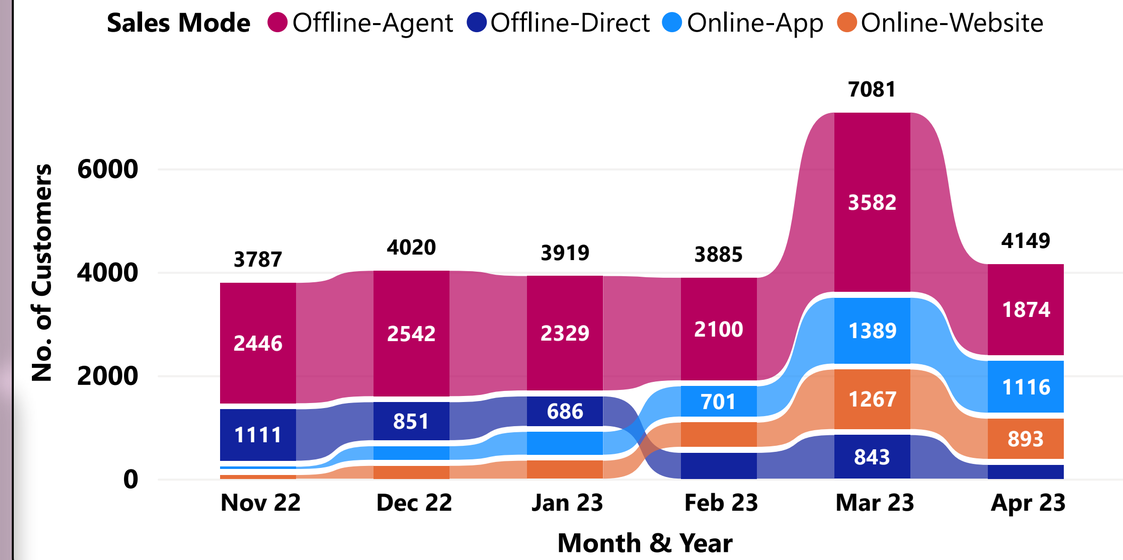

## Sales Mode vs Revenue



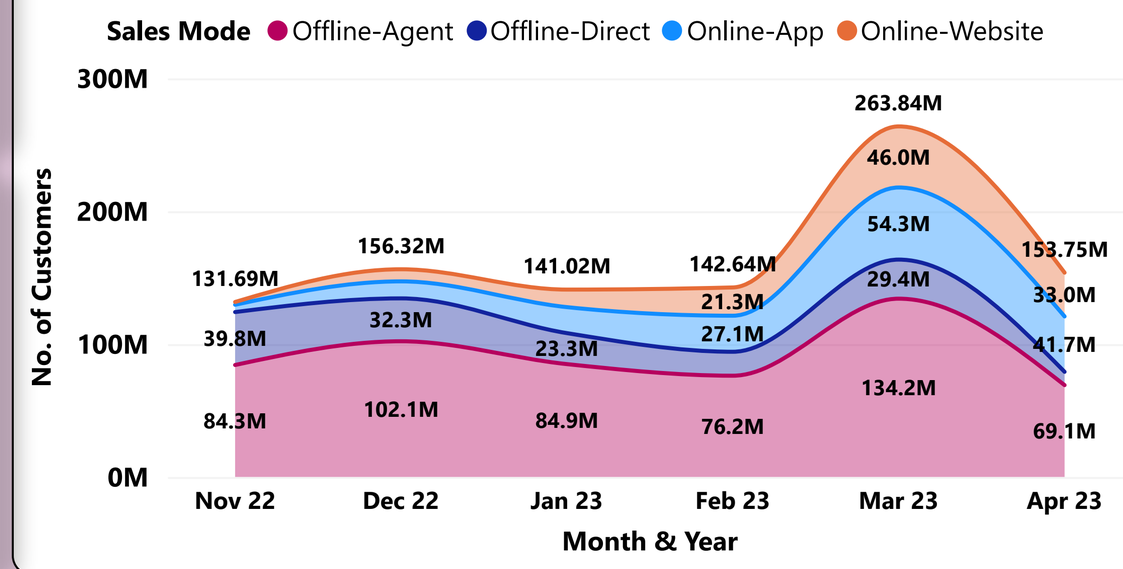

## Policy ID vs Revenue, % share & Customers




## Sales Mode vs No. of Customers & % Distribution per Month




## Sales Mode vs Revenue & % Distribution per Month



Cover | Introduction | Landing Page | Over view | Sales View | Age Group.. | FAQ

# Age Group View

Reset Filters

Week No: All

City: All

Age Group: All

Month: All

Policy ID: All

## Revenue

| Revenue | LM | % Change |
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Abbreviation:
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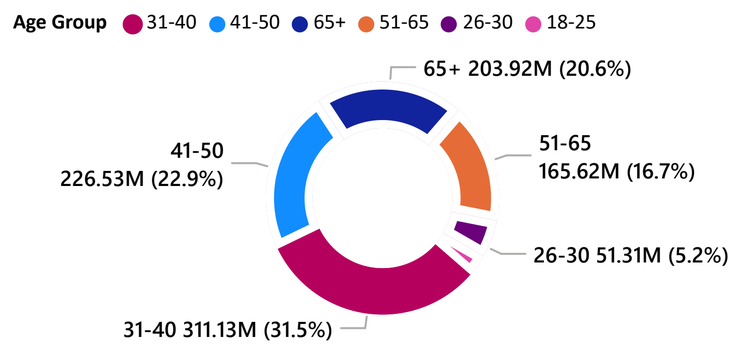
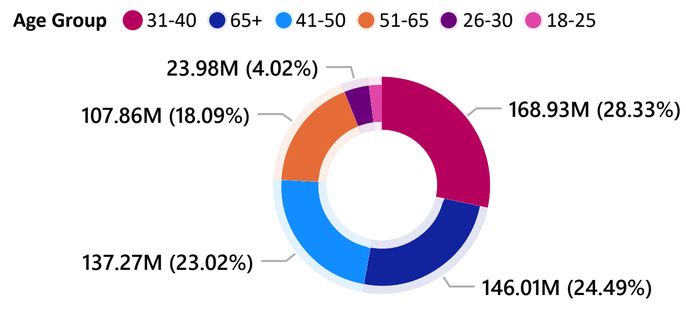
## Age Group % Distribution vs City

| age_group | Chennai | Delhi NCR | Hyderabad | Indore | Mumbai |
|---|---|---|---|---|---|
| 18-25 | 0.95% | 3.34% | 1.41% | 0.63% | 2.02% |
| 26-30 | 1.26% | 4.17% | 1.61% | 0.84% | 2.55% |
| 31-40 | 4.25% | 16.25% | 6.32% | 3.04% | 9.11% |
| 41-50 | 2.50% | 9.20% | 3.73% | 1.68% | 5.35% |
| 51-65 | 1.20% | 4.62% | 1.77% | 0.95% | 2.92% |
| 65+ | 0.90% | 3.43% | 1.33% | 0.66% | 2.01% |

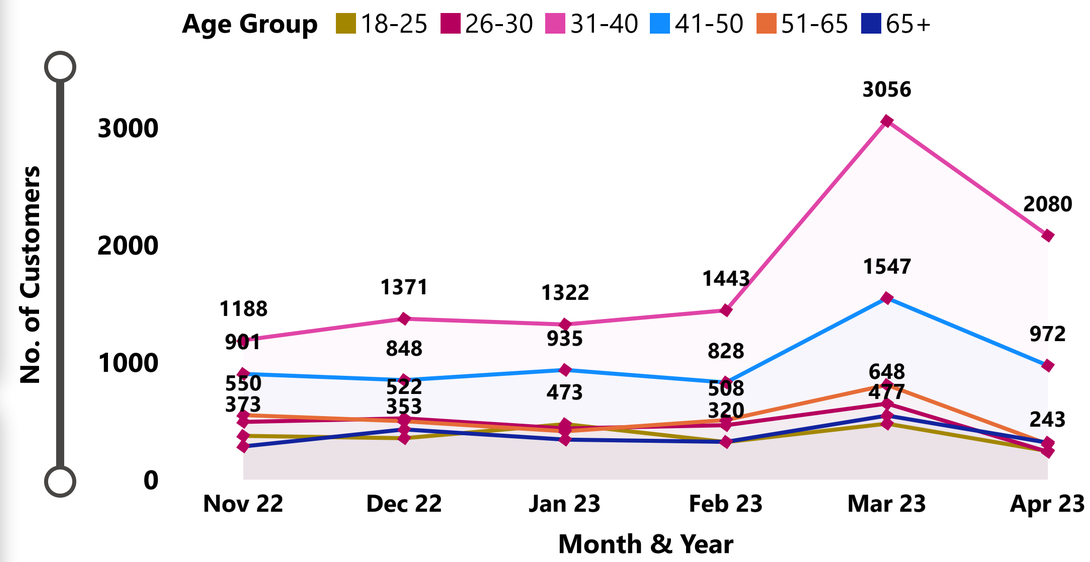
## Age Group vs % Share & Revenue




## Age Group vs Expected Settlement Amount




## Sales Mode vs No. of Customers & % Distribution per Month




## Age Group vs Policy Preference

| Policy ID | 18-25 | 26-30 | 31-40 | 41-50 | 51-65 | 65+ | Total |
|---|---|---|---|---|---|---|---|
| POL4321HEL | 1044 | 955 | 1526 | 561 | 235 | 113 | **4434** |
| POL3309HEL | 276 | 396 | 1836 | 858 | 318 | 145 | **3829** |
| POL4331HEL | 455 | 554 | 1644 | 692 | 242 | 148 | **3735** |
| POL5319HEL | 109 | 253 | 1414 | 949 | 425 | 179 | **3329** |
| POL6303HEL | 110 | 208 | 1202 | 897 | 421 | 179 | **3017** |
| POL6093HEL | 95 | 164 | 966 | 724 | 369 | 225 | **2543** |
| POL9221HEL | 71 | 103 | 779 | 611 | 443 | 311 | **2318** |
| POL2005HEL | 39 | 74 | 499 | 373 | 365 | 618 | **1968** |
| POL1048HEL | 40 | 92 | 594 | 366 | 259 | 317 | **1668** |
| **Total** | **2239** | **2799** | **10460** | **6031** | **3077** | **2235** | **26841** |

# THANK YOU !

FAQ

**Have a question?**

We're here to help.
Feedback fuels growth.

Let's continue the conversation beyond this presentation.



SHIELD INSURANCE ANALYSIS