INVESTMENT ASSIGNMENT

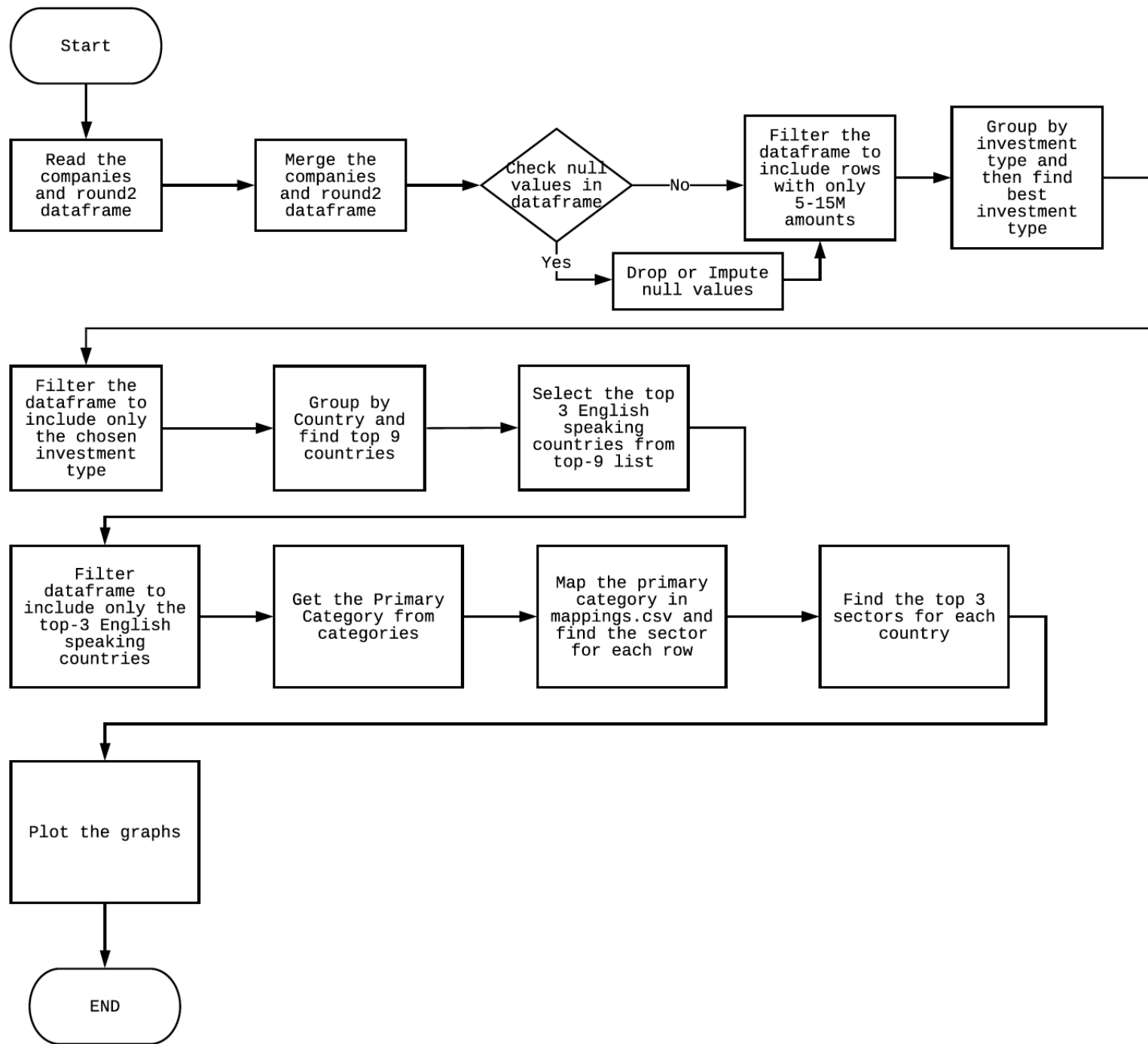# SUBMISSION

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Objective & Goals

Objective :

To identify the best sectors, countries, and a suitable investment type for making investments. The overall strategy is to invest where others are investing, implying that the 'best' sectors and countries are the ones 'where most investors are investing'.

Goals :

1. Find the best investment type in between 5-15M range

2. Find the top 3 English speaking countries for the selected investment type

3. Find the top 3 sectors for each country in top 3 list.

UpGrad

Investment Type

funding_round_type	count	mean	std	min	25%	50%	75%	max
non_equity_assistance	73	411,203	1,771,747	0	25,000	60,000	125,000	15,000,000
equity_crowdfunding	1,228	538,368	1,719,329	0	7,000	100,000	395,901	27,400,000
product_crowdfunding	386	1,363,131	4,698,380	0	40,242	183,915	735,000	52,000,000
grant	2,124	4,300,576	25,587,424	0	50,000	201,684	1,700,000	750,000,000
convertible_note	1,447	1,453,439	8,043,846	0	78,848	272,000	1,000,000	185,048,285
seed	23,602	719,847	2,221,775	0	55,000	275,000	1,000,000	200,000,000
angel	4,860	958,694	7,404,397	0	150,000	400,000	1,000,000	494,511,992
undisclosed	1,582	19,242,370	199,323,809	0	220,000	1,018,680	4,848,804	5,000,000,000
debt_financing	6,682	17,043,526	280,320,357	0	330,484	1,100,000	4,000,000	21,271,935,000
venture	50,228	11,748,949	86,352,067	0	1,600,902	5,000,000	12,000,000	17,600,000,000
post_ipo_equity	628	82,182,494	469,188,916	77	3,764,794	12,262,852	40,000,000	10,664,943,639
post_ipo_debt	152	168,704,572	602,473,804	70,000	4,000,000	19,950,000	60,000,000	5,800,000,000
private_equity	1,936	73,308,593	198,113,458	0	5,000,000	20,000,000	75,000,000	4,745,460,219
secondary_market	30	79,649,630	140,103,760	2,323	5,025,000	32,600,000	84,475,000	680,611,554

Venture is the most suitable invest type as the median is in 5-15M range.

This investment type also has a maximum number of values in this range (16,598). The second one, debt_financing has only 870 values in this range.

Top 9 Countries

The top 9 countries for Venture funds with 5-15M investment range are :

1. United States of America – English speaking country
2. Britain – English speaking country
3. China – Non-English speaking country
4. Canada – English speaking country
5. India – English speaking country
6. Israel – English speaking country
7. France – Non-English speaking country
8. Germany – Non-English speaking country
9. Sweden – Non-English speaking country

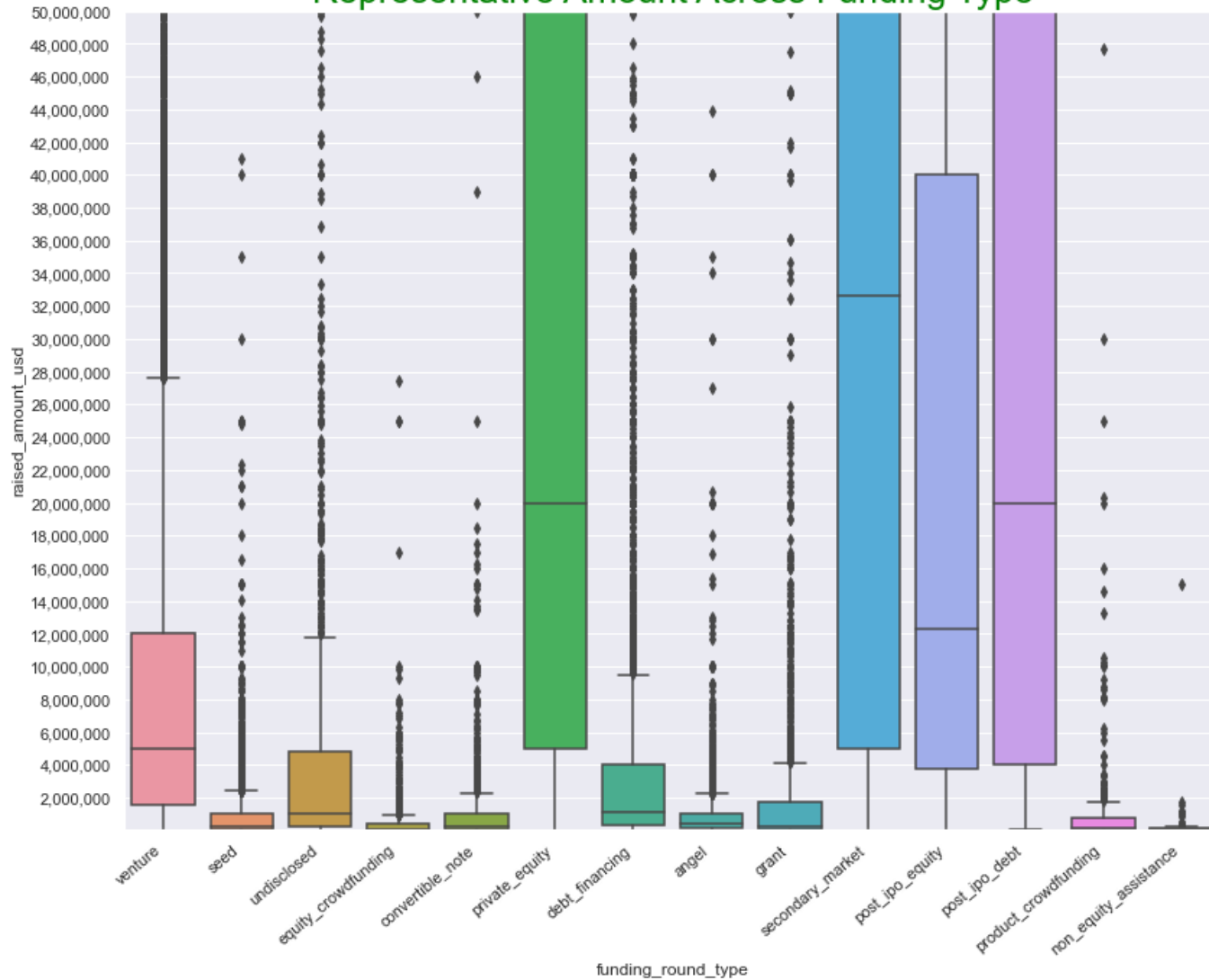*** Interesting Note** : If the range, 5-15M is ignored, Canada and India exchange their places.

country_code	sum	count
USA	108,531,347,515	12150
GBR	5,436,843,539	628
CHN	5,016,561,053	533
CAN	3,647,009,578	426
IND	2,976,543,602	330
ISR	2,840,305,951	323
FRA	2,112,425,453	251
DEU	1,765,026,223	203
SWE	655,040,681	77

country_code	count				sum			
	CAN	GBR	USA	All	CAN	GBR	USA	All
sector								
All	299	410	8014	8723	2,598,168,644	3,537,018,359	71,761,814,788	77,897,001,791
Others	109	147	2950	3206	926,137,962	1,283,624,289	26,321,007,002	28,530,769,253
Social, Finance, Analytics, Advertising	78	133	2714	2925	656,143,075	1,089,404,014	23,807,376,964	25,552,924,053
Cleantech / Semiconductors	112	130	2350	2592	1,015,887,607	1,163,990,056	21,633,430,822	23,813,308,485

Top Sectors Across Top 3 Countries

- US & GB have their top 3 sectors as follows :
    1. Others
    2. Social, Finance, Analytics, Advertising and
    3. Cleantech / Semiconductors

- Whereas CA has
    1. Cleantech / Semiconductors
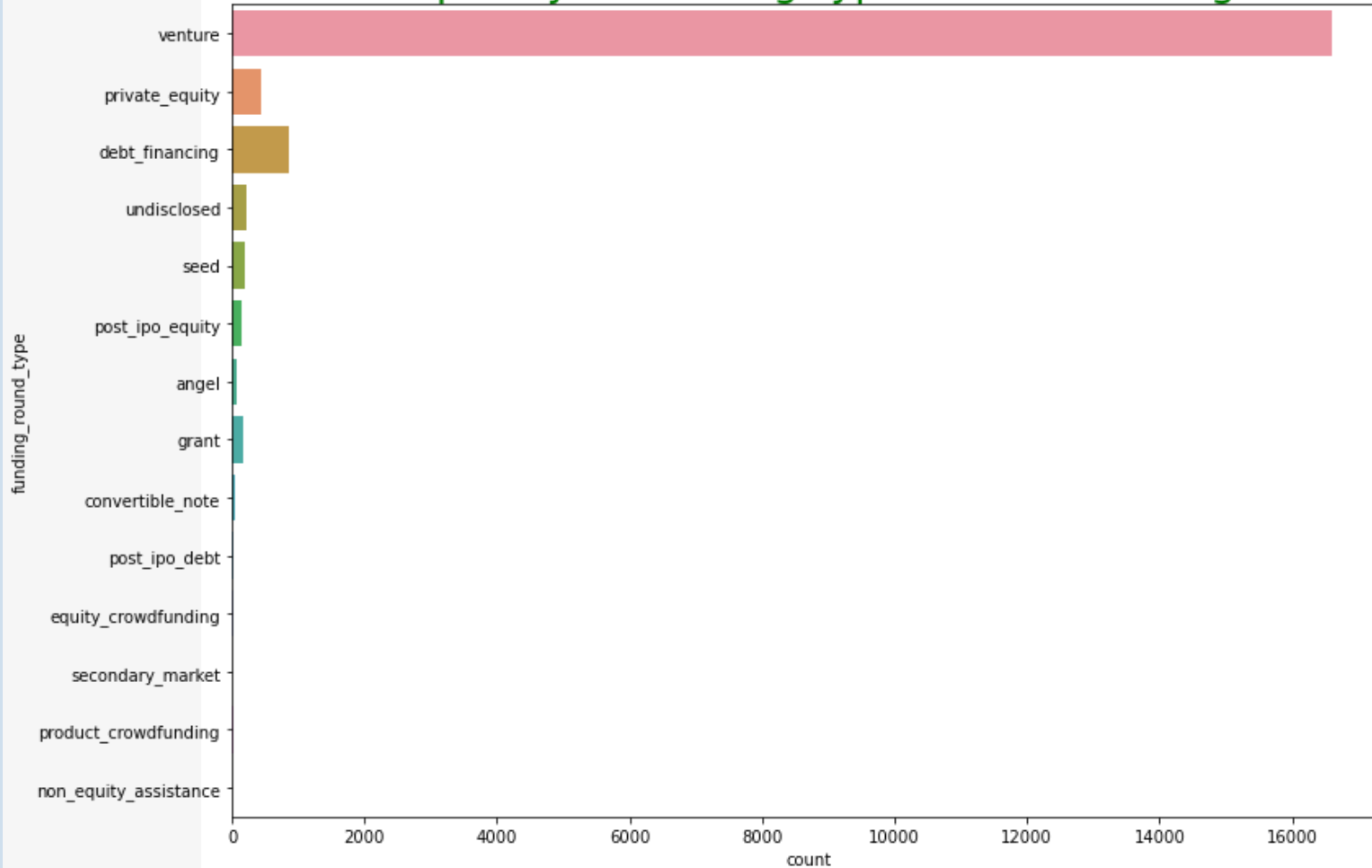   2. Others
    3. Social, Finance, Analytics, Advertising and

Representative Amount Across Funding Type

Investment Type - 1

- This box plot clearly depicts that venture is the only funding type that satisfies the condition of investment amounts in range of 5-15M.
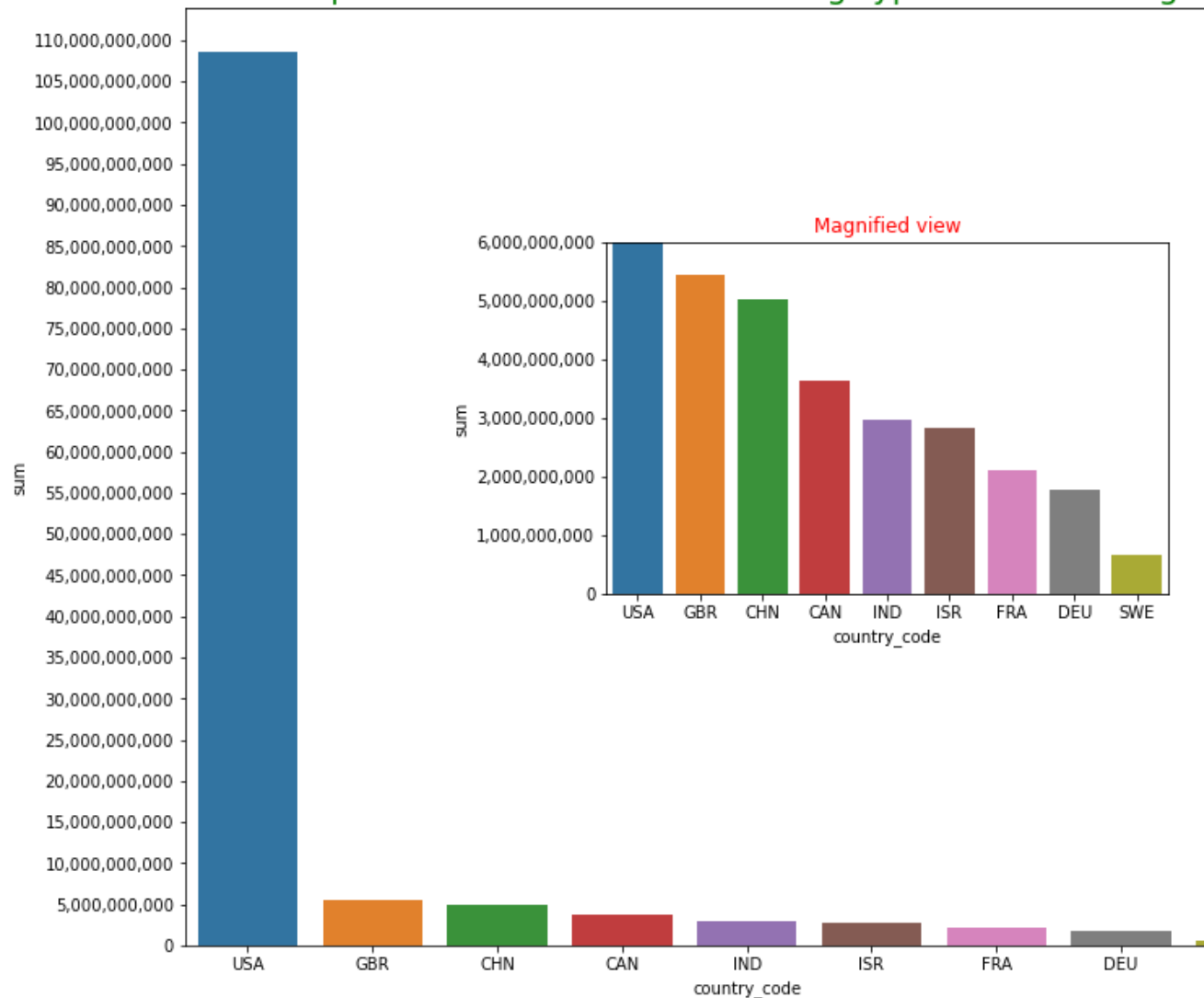
Frequency of Funding Types in 5-15M Range
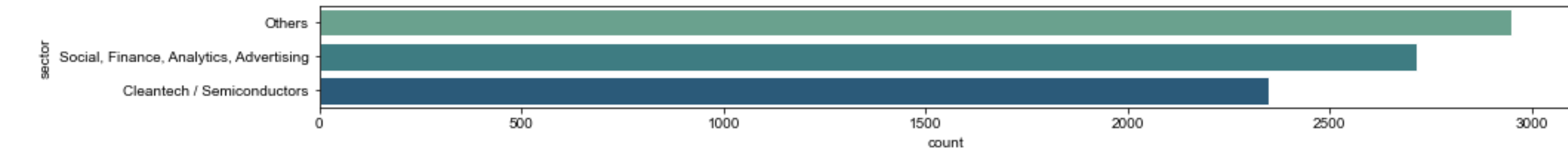
Investment Type - 2

- This chart shows that 5-15M investment range has mostly **Venture** funding type and it reinforces that **Venture** is the **BEST** funding type for our company.
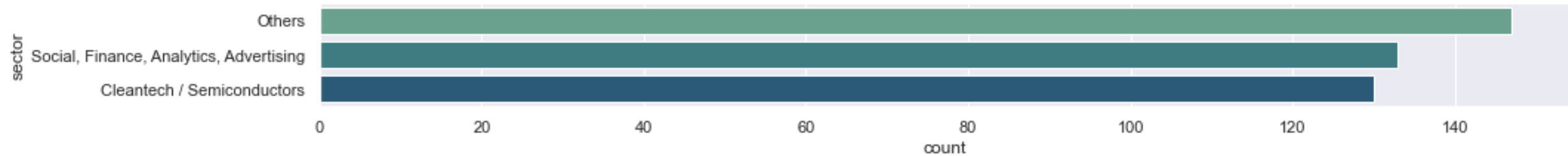
Top 3 Countries

- This chart shows that top three venture funding, English speaking countries are
  - USA
  - GBR and
  - CAD

Great Britain

Canada

Top 3 Sectors

Rank	USA	GBR	CAN
1	Others	Others	Cleantech / Semiconductors
2	Social, Finance, Analytics, Advertising	Social, Finance, Analytics, Advertising	Others
3	Cleantech / Semiconductors	Cleantech / Semiconductors	Social, Finance, Analytics, Advertising

Conclusion

- USA represents 92% of investments, followed by GBR with 4% and CAN with 3%.

- 67% investments are in top 3 sectors. For CAN, it even increases to 71%

- Chosen Investment Type : Venture

- Top 3 Countries : USA, GBR and CAN

- Top 3 Sectors in no particular order :
  - Others
  - Social, Finance, Analytics, Advertising
  - Cleantech / Semiconductors

Recommendation is to concentrate in US with the sectors as "Others", "Social, Finance, Analytics, Advertising" and "Cleantech / Semiconductors"