Data Exploration & Summary
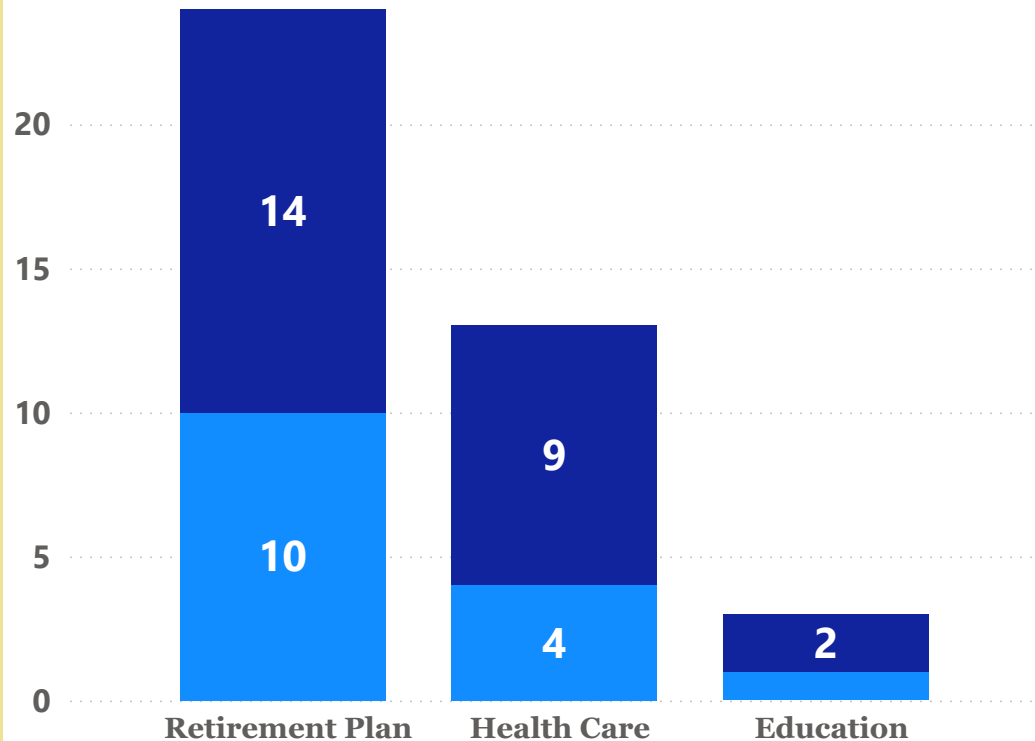
Objective : Understand and Summarize the key statistics in the data sets

Avg Age
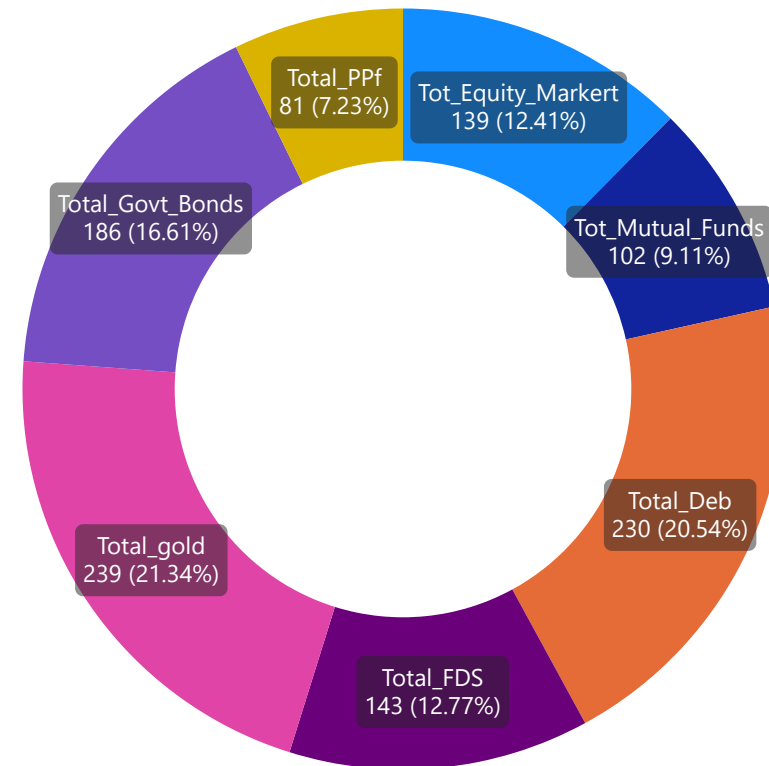
27.80

Common Savings objectives
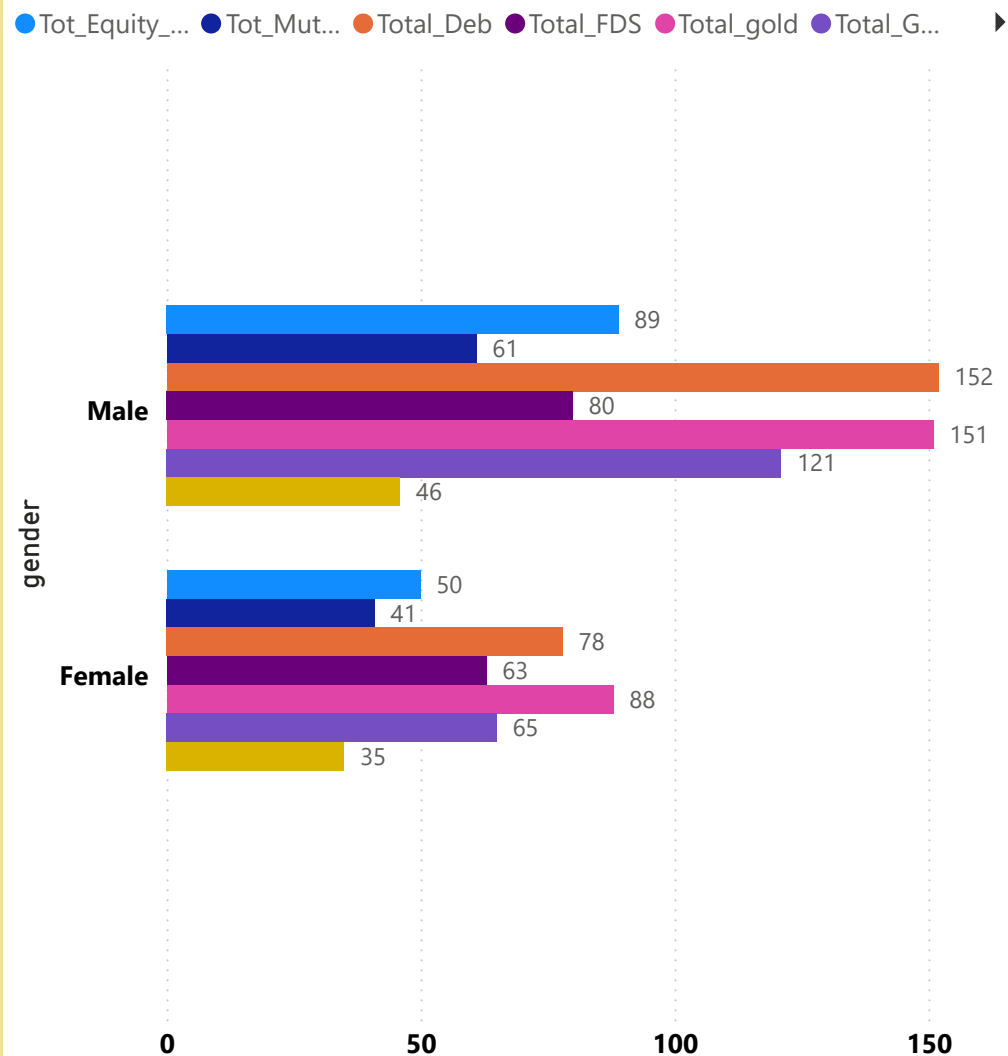
gender ● Female ● Male

Retirement Plan	Health Care	Education
14 (Male) / 10 (Female)	9 (Male) / 4 (Female)	2

Investment Choice Distribution

- Total_PPf 81 (7.23%)
- Tot_Equity_Markert 139 (12.41%)
- Tot_Mutual_Funds 102 (9.11%)
- Total_Deb 230 (20.54%)
- Total_FDS 143 (12.77%)
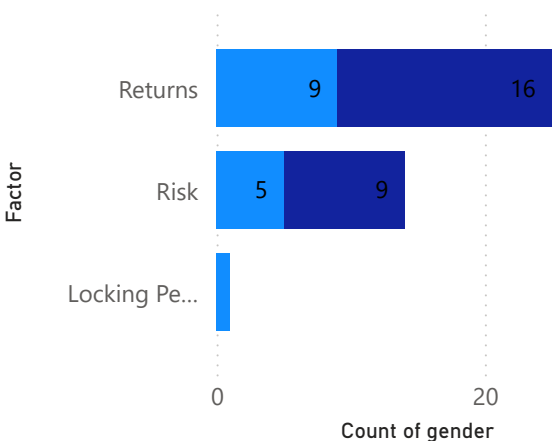- Total_gold 239 (21.34%)
- Total_Govt_Bonds 186 (16.61%)

Gender Based Analysis

Objective : Analyze & Visualize gender based diffrence in investment preferences
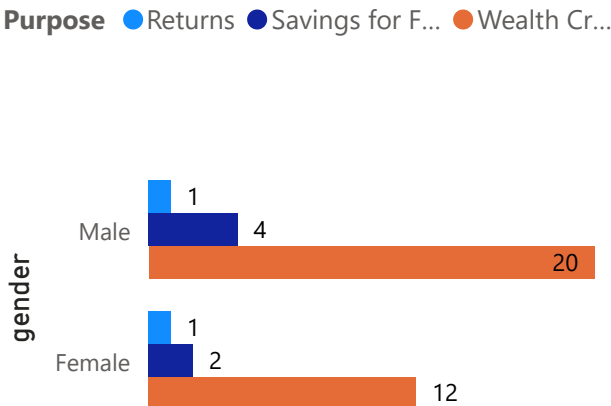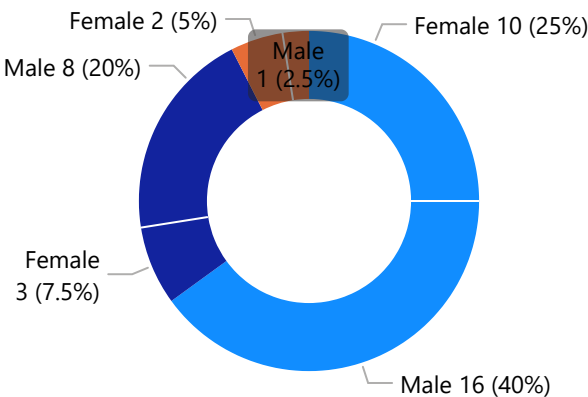
Investment Choice By Gender

Legend: ● Tot_Equity_... ● Tot_Mut... ● Total_Deb ● Total_FDS ● Total_gold ● Total_G...

Male:
- Tot_Equity: 89
- Tot_Mut: 61
- Total_Deb: 152
- Total_FDS: 80
- Total_gold: 151
- Total_G: 121
- (gold bar): 46

Female:
- Tot_Equity: 50
- Tot_Mut: 41
- Total_Deb: 78
- Total_FDS: 63
- Total_gold: 88
- Total_G: 65
- (gold bar): 35

Factor by Gender

- Returns: 9, 16
- Risk: 5, 9
- Locking Pe...:

Count of gender

Avenue Preference

Avenue: ● Equity ● Fixed Depo... ● Mutual Fund ● Public Pro...

Male:
- Equity: 7
- Fixed Deposit: 6
- Mutual Fund: 10
- Public Pro: 2

Female:
- Equity: 3
- Fixed Deposit: 3
- Mutual Fund: 8
- Public Pro: 1

gender

Purpose of investment

Purpose: ● Returns ● Savings for F... ● Wealth Cr...

Male:
- Returns: 1
- Savings for F: 4
- Wealth Cr: 20

Female:
- Returns: 1
- Savings for F: 2
- Wealth Cr: 12

Objective Chosen

- Female 2 (5%)
- Female 10 (25%)
- Male 8 (20%)
- Male 1 (2.5%)
- Female 3 (7.5%)
- Male 16 (40%)
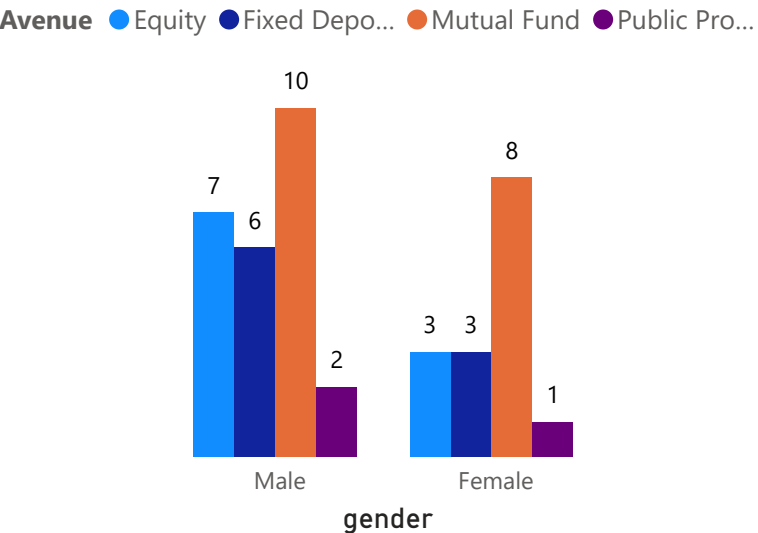
Objective Analysis

Objective: Analyze the relation b/w Objective & Investment choices

Investment choice for each savings Objective

Wealth Creation

Savings for Fu...

6

6

13

Growth 5

Growth 6

Capital Appreciation 1

Returns

Capital Appreciation 1

Capital Appreciation 24

Income 2

Income 1

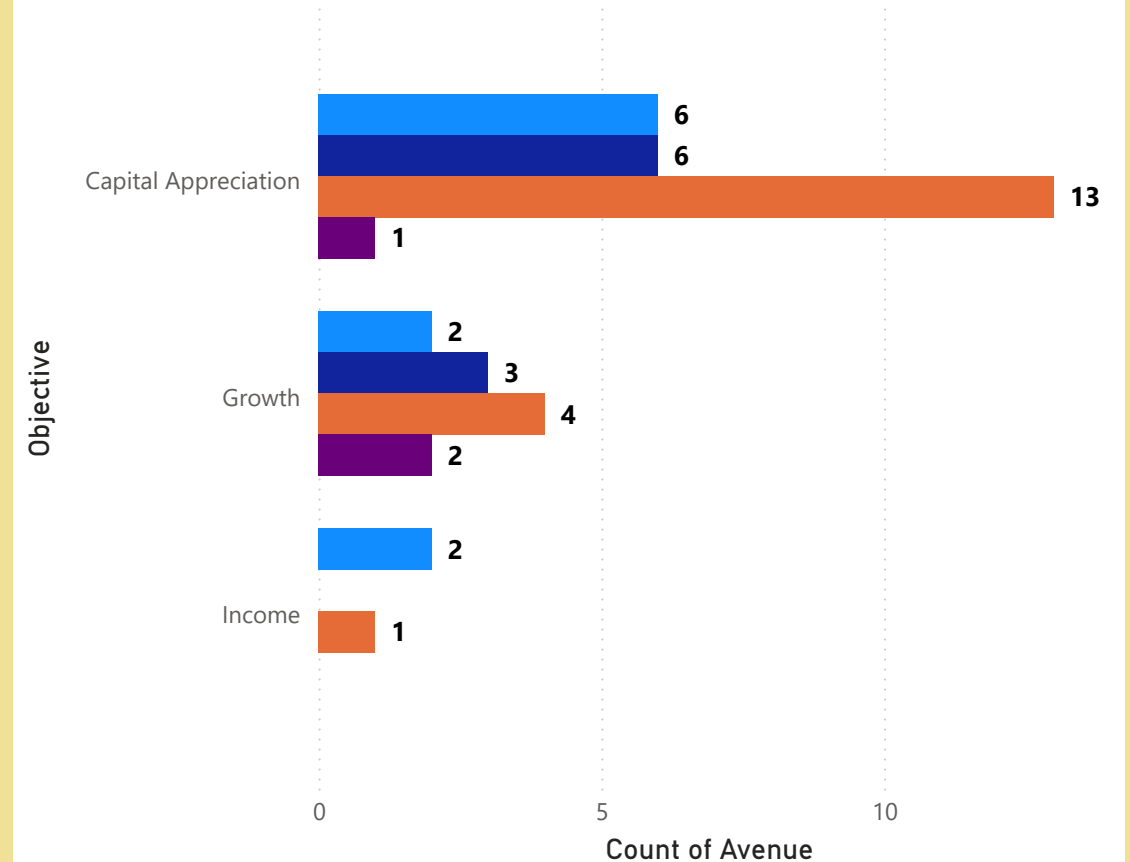| Purpose	Objective	Avenue
All	All	All

Relation b/w Objective & Avenue

Avenue ● Equity ● Fixed Deposits ● Mutual Fund ● Public Provident Fund

Capital Appreciation
- 6
- 6
- 13
- 1

Growth
- 2
- 3
- 4
- 2

Income
- 2
- 1

Objective

Count of Avenue

0   5   10

Investment Duration & Frequency

Objective: Analyze investment durations and monitoring frequrncies

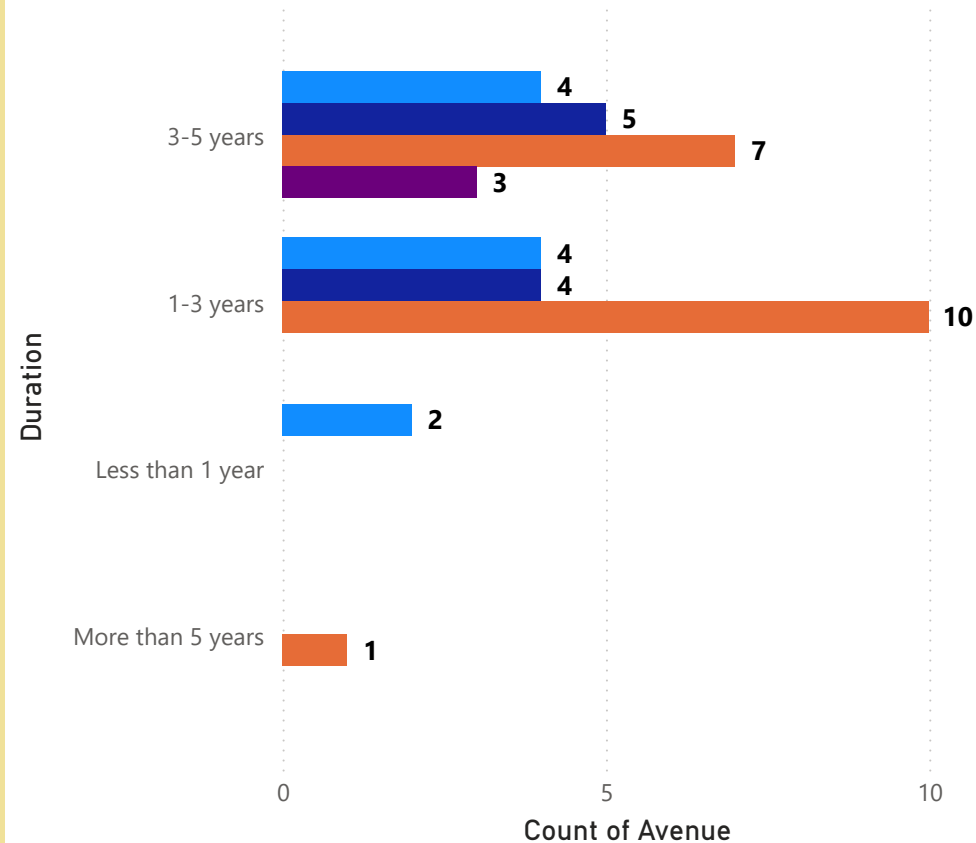| Fixed Deposits	Equity	Public Provident Fund	Mutual Fund
9	**10**	**3**	**18**

Avenue: All
Duration: All
Invest_Monitor: All

Avenue by Duration

Avenue ●Equity ●Fixed Deposits ●Mutual Fund ●Public Provident Fund

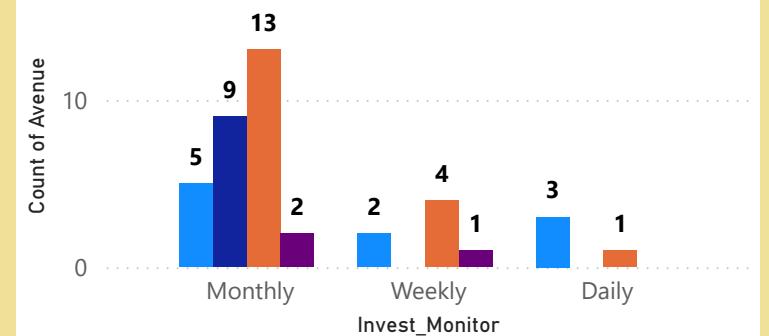- 3-5 years: Equity 4, Fixed Deposits 5, Mutual Fund 7, Public Provident Fund 3
- 1-3 years: Equity 4, Fixed Deposits 4, Mutual Fund 10
- Less than 1 year: Equity 2
- More than 5 years: Mutual Fund 1

Count of Avenue

Distribution of Invest Monitor

- 4 (10%)
- 7 (17.5%)
- 29 (72.5%)

Invest_Monitor
●Monthly
●Weekly
●Daily

Avenue by Invest_monitor

Avenue ●Equity ●Fixed Deposits ●Mutual Fund ●Public Prov...

- Monthly: Equity 5, Fixed Deposits 9, Mutual Fund 13, Public Prov 2
- Weekly: Equity 2, Mutual Fund 4, Public Prov 1
- Daily: Equity 3, Mutual Fund 1

Count of Avenue / Invest_Monitor

Distribution of Duration

- 2 (5%)
- 19 (47.5%)
- 18 (45%)
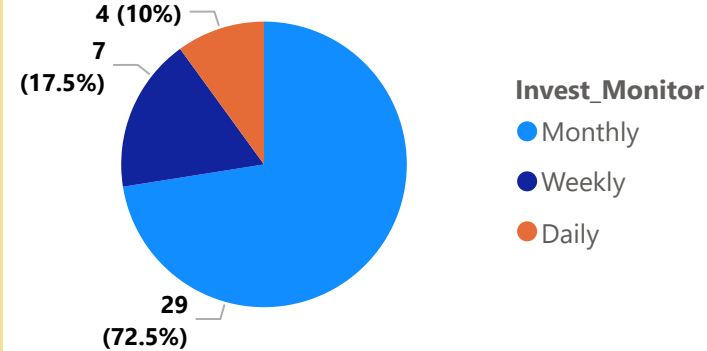
Duration
●3-5 years
●1-3 years
●Less than 1 y...
●More than 5 ...
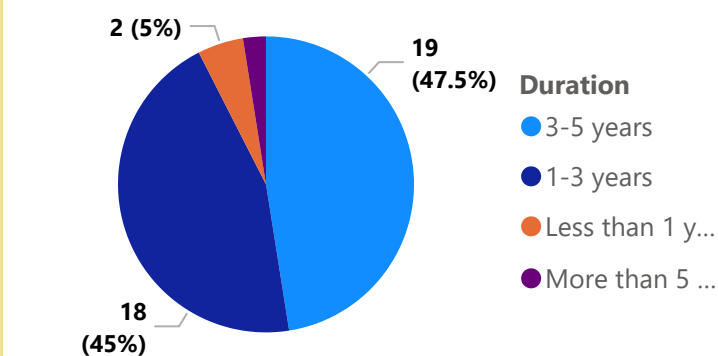
Invest_Monitor By Duration

Invest_Monitor ●Daily ●Monthly ●Weekly

- 3-5 years: Daily 1, Monthly 16, Weekly 2
- 1-3 years: Daily 1, Monthly 13, Weekly 4
- Less than 1 year: Daily 2
- More than 5 years: Weekly 1

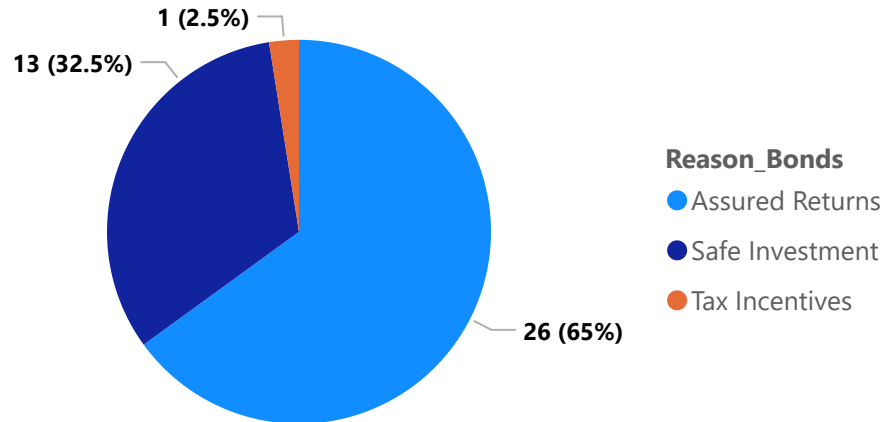Count of Invest_Monitor / Duration
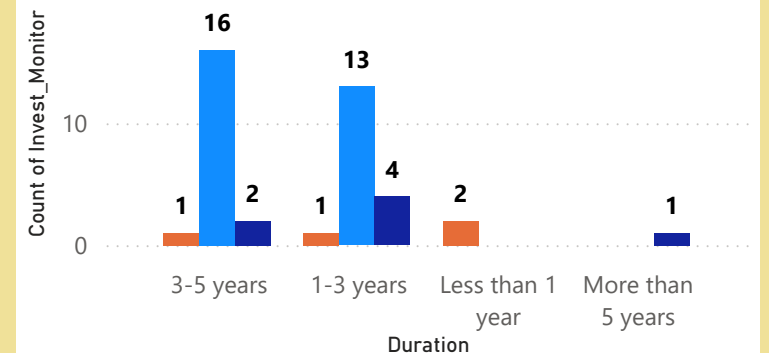
Reasons for Investment

Objective: Analyze & Visualize the reasons for investment

Reason for Govt Bonds

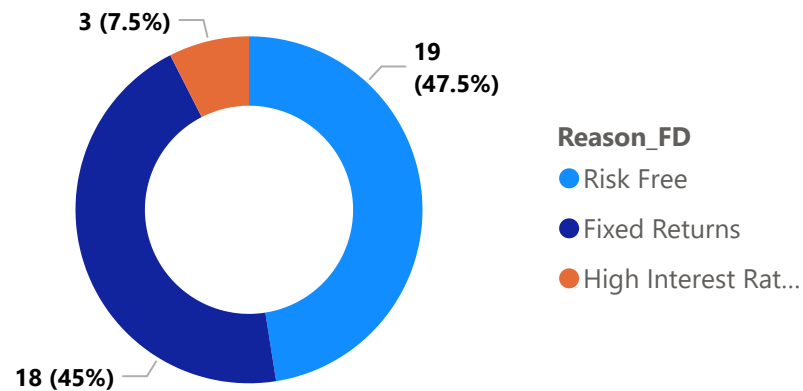
1 (2.5%)
13 (32.5%)
26 (65%)

Reason_Bonds
- Assured Returns
- Safe Investment
- Tax Incentives

Reason for Mutual Funds

Reason_Mutual ● Better Returns ● Fund Diversification ● Tax Benefits

24
Better Returns

13
Fund Diversification

3
Tax Benefits

Reason For Eqity

Reason_Equity ● Capital Appreciation ● Dividend ● Liquidity

30
Capital Appreciation

8
Dividend
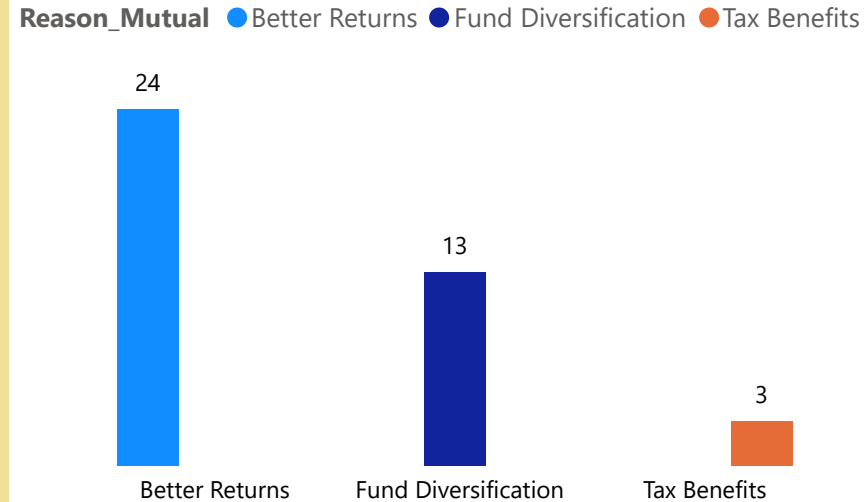
2
Liquidity
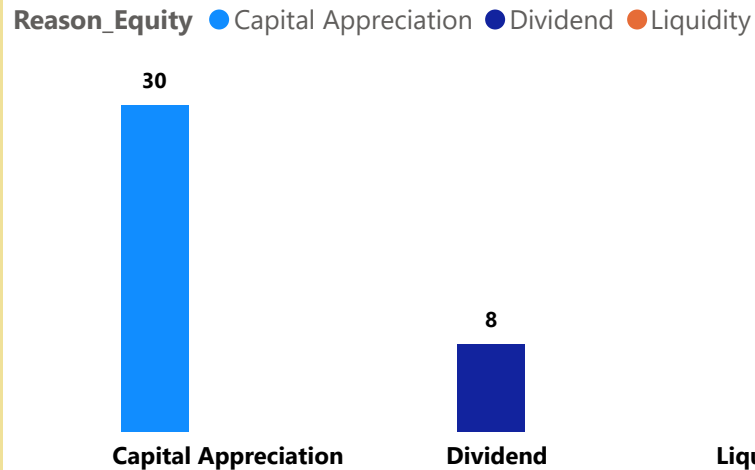
Reason for Fixed Deposits

3 (7.5%)
19 (47.5%)
18 (45%)

Reason_FD
- Risk Free
- Fixed Returns
- High Interest Rat...

Factor ⌄
- ☐ Locking Period
- ☐ Returns

Stock_Marktet ⌄
- ☐ No
- ☐ Yes

gender ⌄
- ☐ Female
- ☐ Male

Purpose ⌄
- ☐ Returns
- ☐ Savings for Future
- ☐ Wealth Creation

Duration ⌄
- ☐ 1-3 years
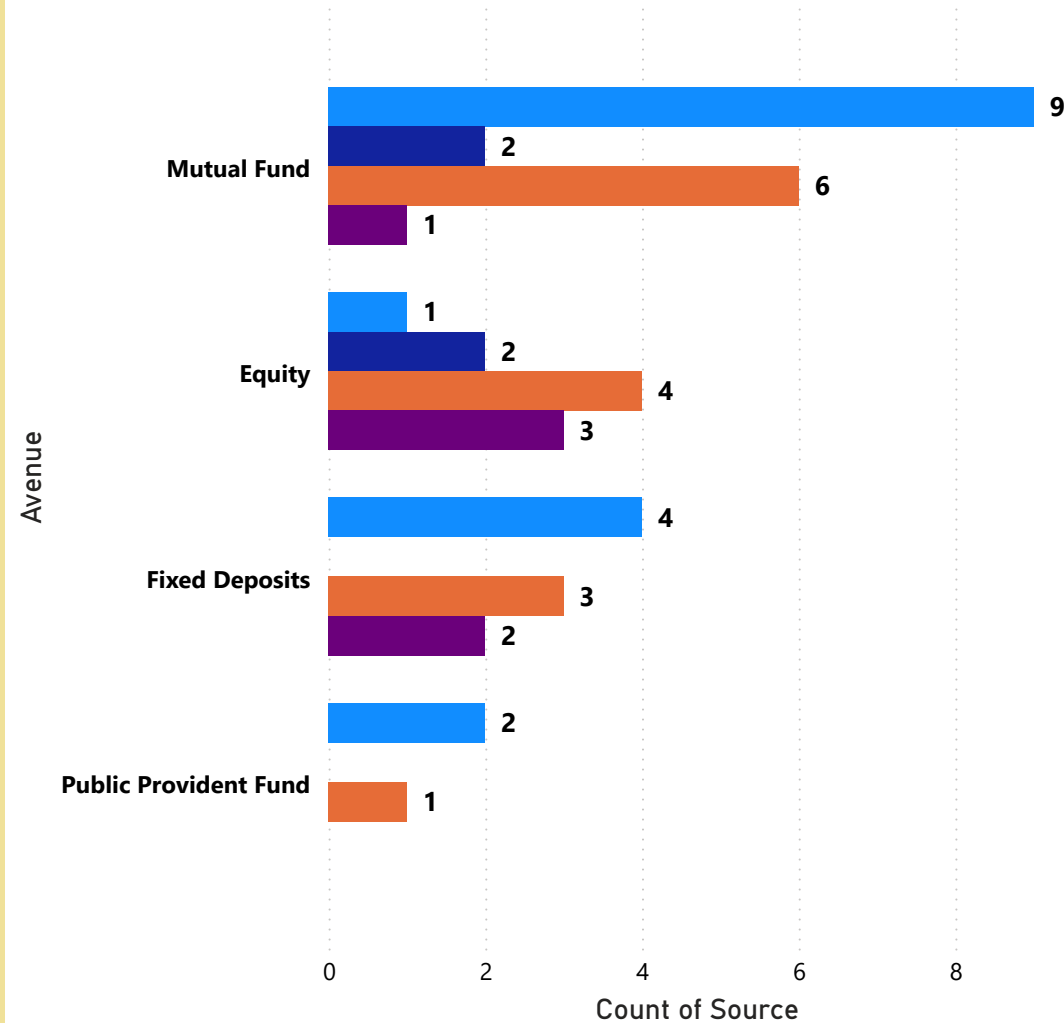- ☐ 3-5 years
- ☐ Less than 1 year
- ☐ More than 5 years

Source of Information

Objective: Analyze the source from which individual gather information for investment
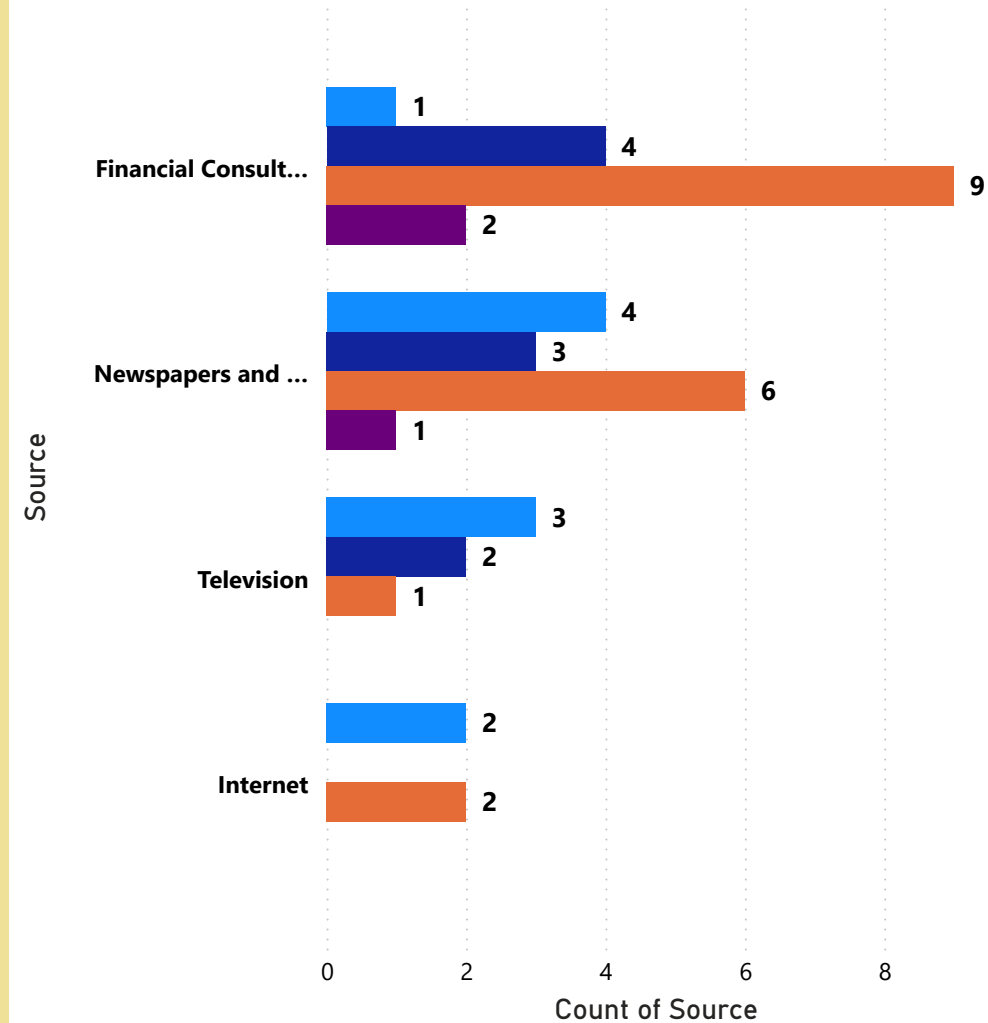
Count of Source by Avenue and Source

Source ● Financial Consultants ● Internet ● Newspapers and Magazines ● Television

Count of Source by Source and Avenue

Avenue ● Equity ● Fixed Deposits ● Mutual Fund ● Public Provident Fund

Factor
- [ ] Locking Period
- [ ] Returns

Stock_Marktet
- [ ] No
- [ ] Yes

gender
- [ ] Female
- [ ] Male

Purpose
- [ ] Returns
- [ ] Savings for Future
- [ ] Wealth Creation

Duration
- [ ] 1-3 years
- [ ] 3-5 years
- [ ] Less than 1 year
- [ ] More than 5 years

FINANCIAL INVESTMENT ANALYSIS
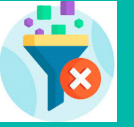
Avg Age	Equity	FD	Mutual Funds	PPF	Female	Male	Gender	Purpose	Objective
27.80	10	9	18	3	15	25	All ▾	All ▾	All ▾

Investment Choice Distribution
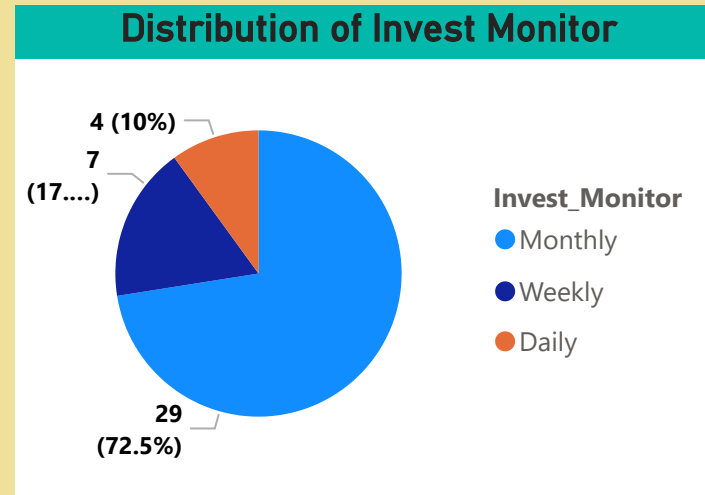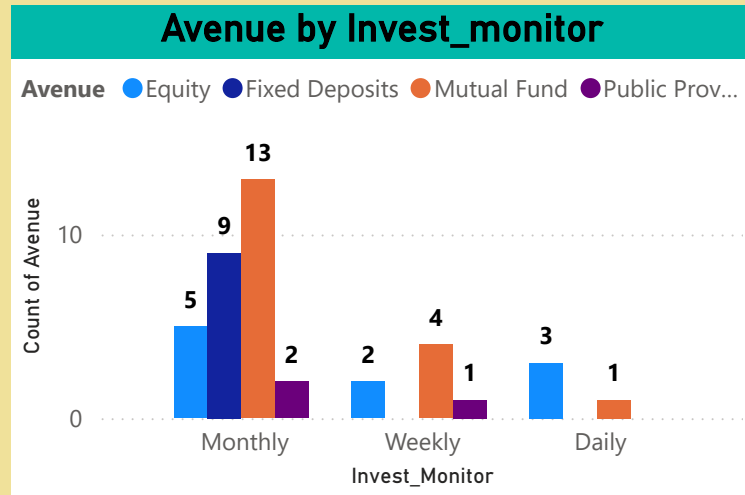
Factor	Source	Monitoring	Monitoring
All ▾	All ▾	All ▾	All ▾

Govt Bonds **Mutual Funds** **Equity** **Fixed Deposits**

Tot_Equity_Markert 139 (12.41%)
Tot_Mutual_F... 102 (9.1...)
Total_Deb 230 (20.5...)
Total_FDS 143 (12.77%)
Total_gold 239 (21.34%)
Total_Govt_Bonds 186 (16.61...)

Purpose of investment

- 32 Wealth Creation
- 6 Savings for Future
- 2 Returns

Reason for Govt Bonds

1 (2.5%)
13 (32.5%)
26 (65%)

Reason_Bonds
- Assured Returns
- Safe Investment
- Tax Incentives

Common Savings objectives

- 24 Retirement Plan
- 13 Health Care
- 3 Education

Objective Chosen

Income 3 (7.5%)
Growth 11 (2...)
Capital Appreciation 26 (65%)

FINANCIAL INVESTMENT ANALYSIS

Avg Age	Equity	FD	Mutual Funds	PPF	Female	Male
27.80	10	9	18	3	15	25

Gender
All ▼

Purpose
All ▼

Objective
All ▼

Avenue by Invest_monitor

Avenue ● Equity ● Fixed Deposits ● Mutual Fund ● Public Prov...

Distribution of Invest Monitor

Invest_Monitor
● Monthly
● Weekly
● Daily

4 (10%)
7 (17....)
29 (72.5%)

Source
All ▼

Monitoring
All ▼

Monitoring
All ▼

Avenue by Duration

Avenue ● Equity ● Fixed Deposits ● Mutual Fund ● Public Provident Fund

Invest_Monitor By Duration

Invest_Mon... ● Daily ● Monthly ● Weekly

Distribution of Duration

Duration
● 3-5 years
● 1-3 years
● Less than 1 ...
● More than ...

2 (5%)
19 (47.5%)
18 (45%)