

Cognifyz

INVESTMENT ANALYSIS

Contributed by - Asma Parveen



1

Investment Objectives

Investment strategies based on customer demography analyze factors like age. By understanding these demographics, investors can target market segments more effectively, optimize returns, and align investment offerings with specific needs and preferences of different customer groups.

2

Investment Reasons

Investors choose investments to achieve financial goals, such as wealth growth, income generation, or risk management, based on factors like personal objectives, market conditions, and time horizon.

3

Investment Durations

Investment duration determines strategy: short-term investments focus on quick gains, while long-term investments aim for sustained growth and stability. Duration impacts risk tolerance and expected returns.

• click on shapes to navigate through the pages.

1 Investment based on Customer Demographics

Avenue

All

Customer demographics

1.Total investments made - 280 where 62% of investments are done by Males followed by female-37%

280

Investments

Female – 105

Male – 175



Investment Choices

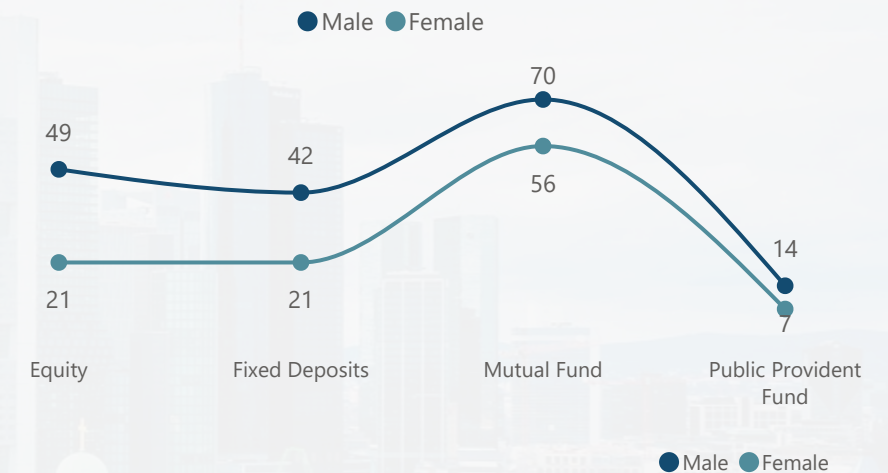
1.Common choice of investment is Mutual Funds because it offer professional management of investments followed by investment in Equity

126

Mutual Funds

Female investors – 56

Male investors – 70



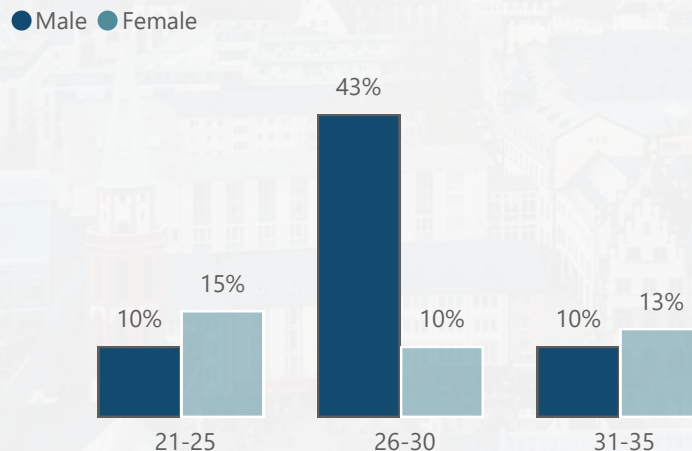
Investment made by Different Age Group

1.Age group 26-30 invest nearly 50% than other age group in this dataset in this age group the most contributors are male who holds 43% of investments and 10% females

27.80

Avg Age

Average age of investment is considered to be 28

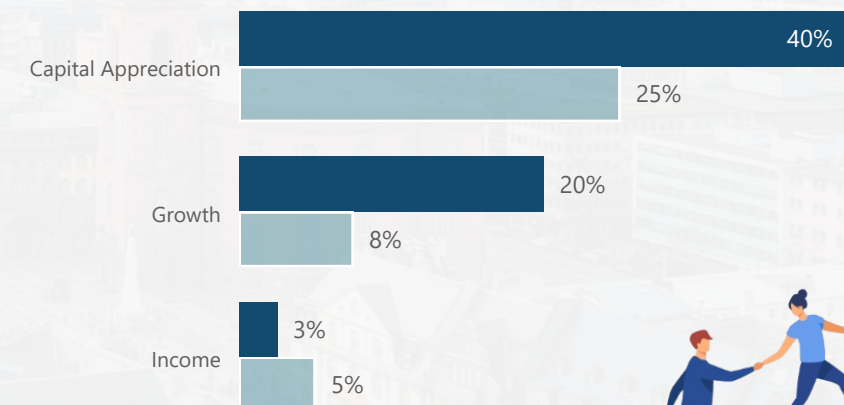


Investment Objectives

65% of Investors use capital appreciation as an investment strategy to achieve financial objectives
40% - male investors
25% - female investors

28% prefer Growth as investment strategy

followed by income



2 Investment preferences and Reasons

Gender

All

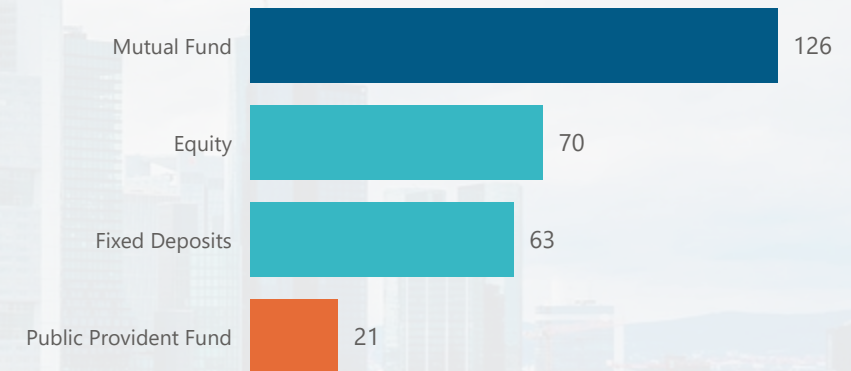
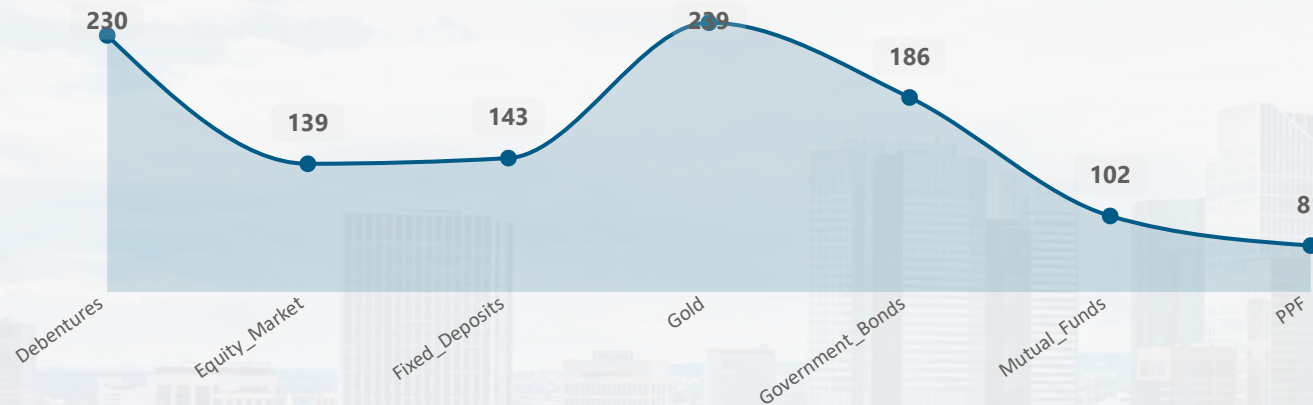
Investment Preferences

1K

Total Investments

1. Over 1K investments are made and Gold is the common investment attribute to invest nearly 239 investments are made followed by Debentures with 230 investments

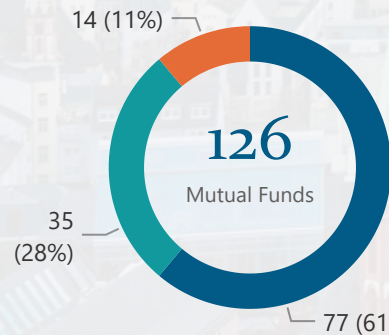
2. Common invest avenue preferred is Mutual fund in terms of getting high returns 126 investments are done followed by equity with 70 invests and Fixed deposits with 63 invests



Reasons of

Mutual funds

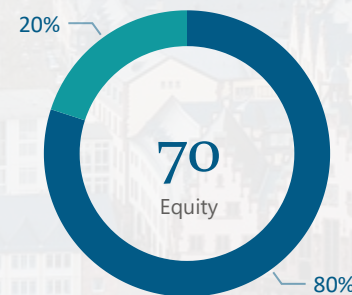
● Better Returns ● Fund Diver... ● Tax Benef...



77/126 investments are made to get Better returns

Equity

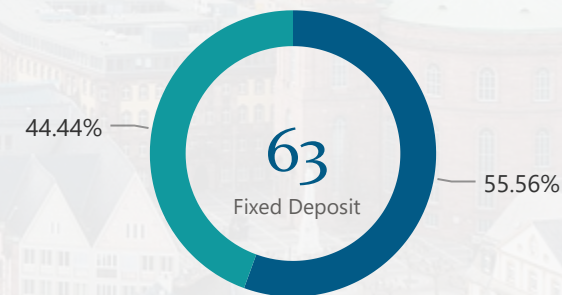
● Capital Appreciation ● Dividend



80% investments are made to get increased Capital appreciation

Fixed Deposit

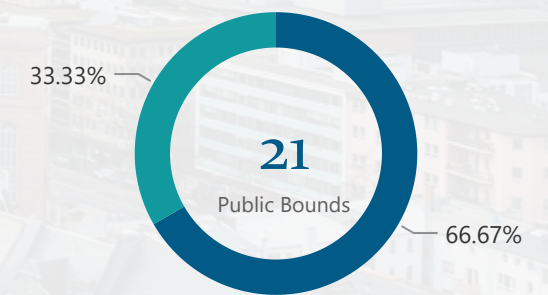
● Fixed Returns ● Risk Free



55% reason of investment in Fixed deposit to get fixed returns

Public Bounds

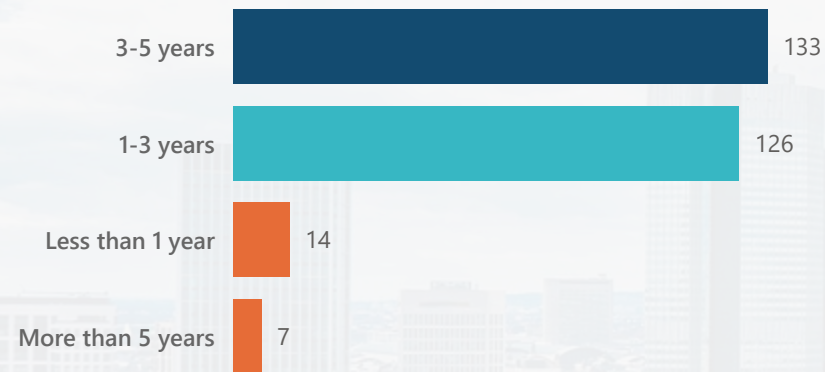
● Assured Returns ● Safe Investment



66% investments are made to get Better Assured returns

Duration of Investment

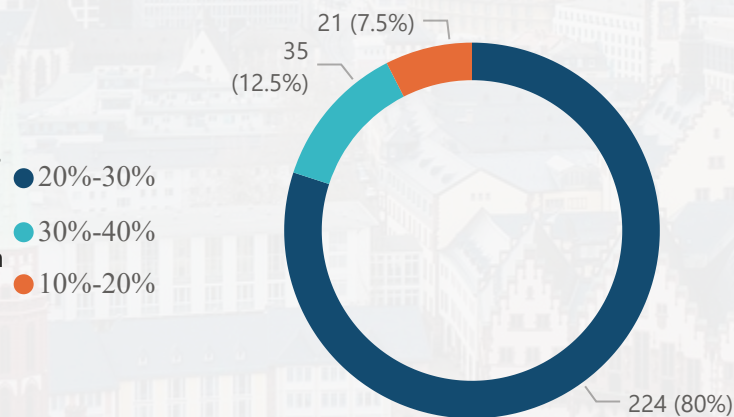
1. Commonly investments are made for the year 3-5 years in terms of getting high returns in long period of time.
2. followed by 1-3 years of 126 investments are done in terms of getting high returns in short period of time



Investment Return Expectations

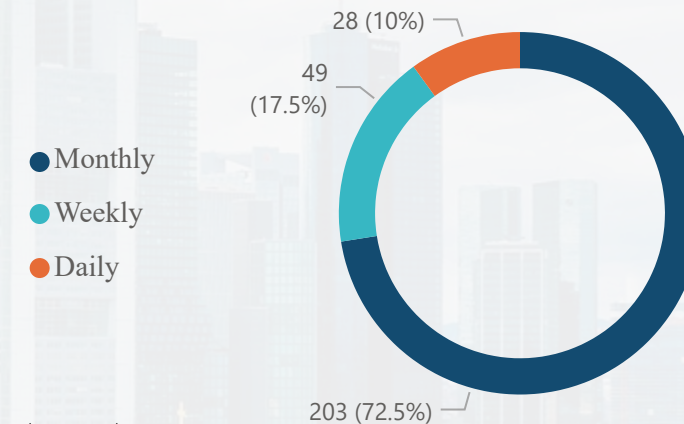
1. Over 80% of people expect 20% -30 % of increase in investment.

2. And 12% of people expect 30 to 40% raise in investment amount



Frequency of Investment

1. Nearly 72% of people pay investment amount on Monthly basis.
2. followed by Weekly basis nearly 49%
3. less people prefer on Daily basis



Investment source

1. 40% of people got information about the investment through Financial consultants and 35% of through Newspapers and Magazines

