

# Data Exploration and Summary

**27.80**

*Average Age*

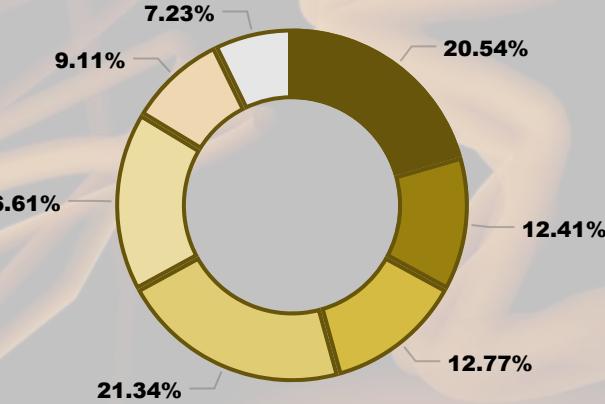
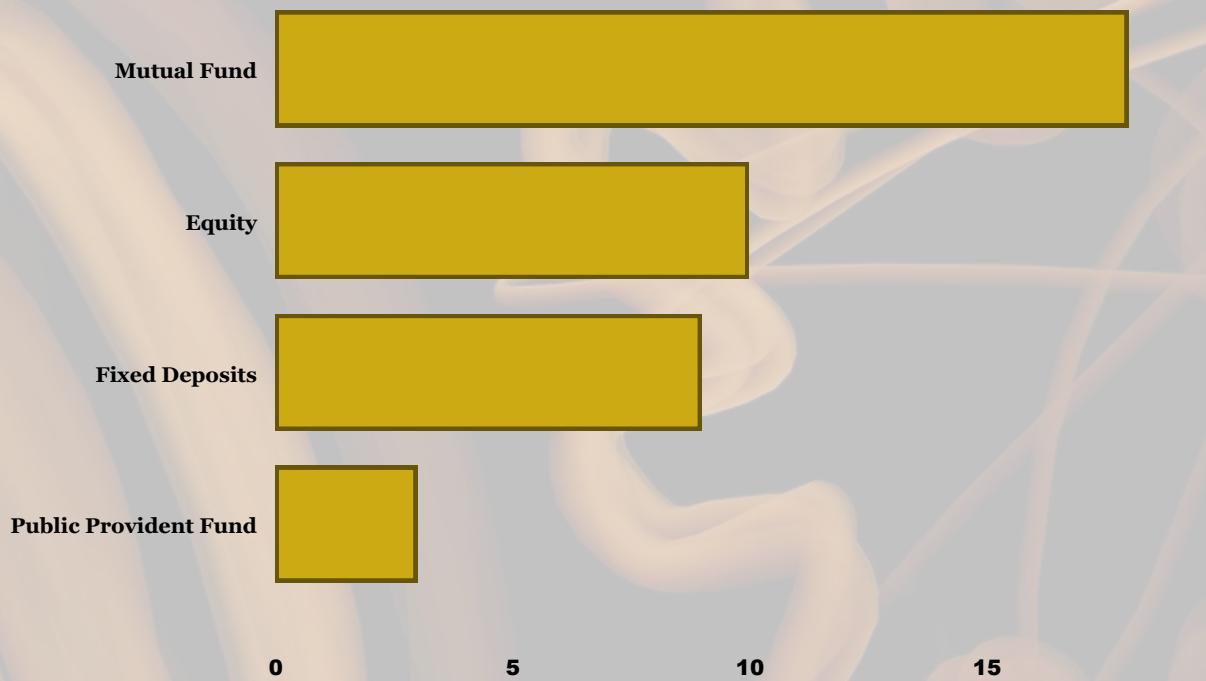
**37**

*Investment Avenues*

**40**

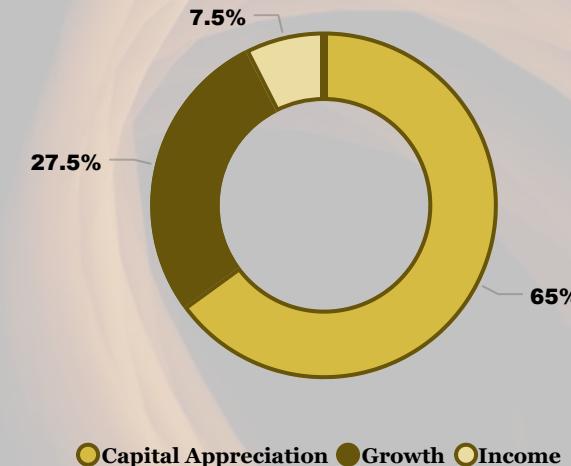
*No Investment Avenues*

## *Investment Avenues counts*



● Total Deb... ● Total Eq... ● Total Fixe... ● Total Gold ● Total Go... ● Total Mut... ● Total PP...

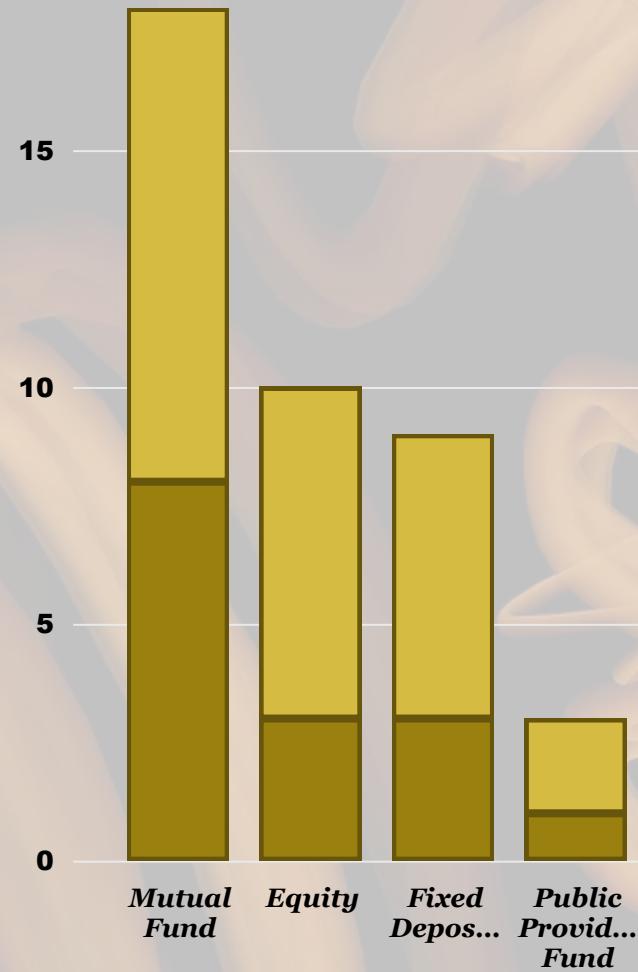
## *Individuals by Savings Objectives*



● Capital Appreciation ● Growth ● Income

# Gender Based Analysis

**Investor Count by Avenue & Gender**



**25**

*Male Count*

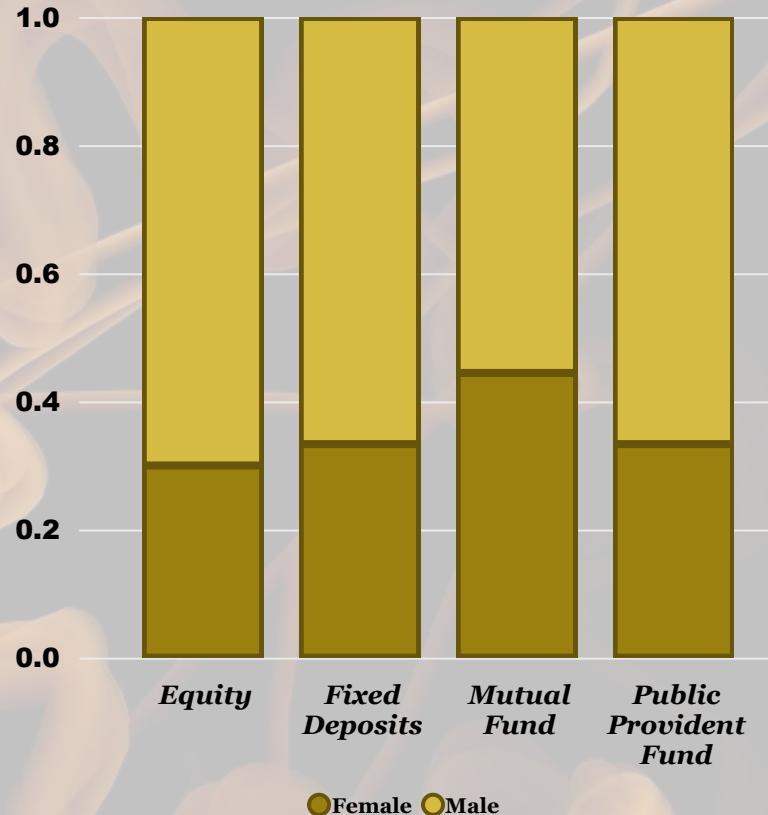
**15**

*Female Count*

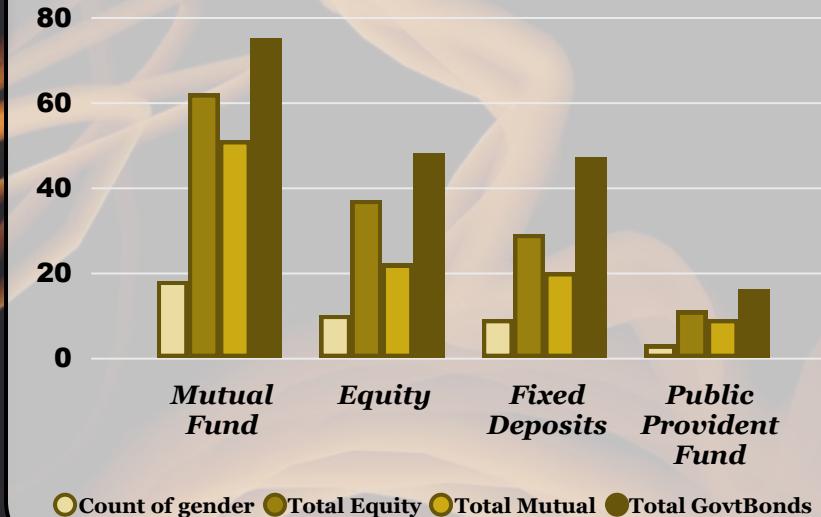
**1.00**

*Invested %*

**Gender Proportion by Investment Avenue**



**Amount Invested by Gender**



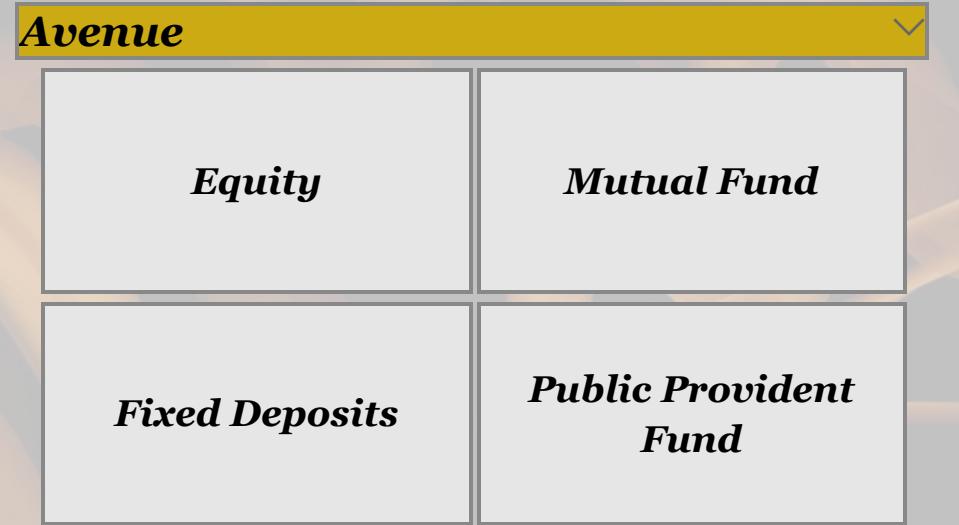
## Key Insights:

- In the Mutual Fund, Equity Market, and Government Bonds there are 25 Male and 15 Female investors.
- Males invest more across all avenues, especially Government Bonds.
- Females have higher proportion in Mutual

# Objective Analysis

**0.33**

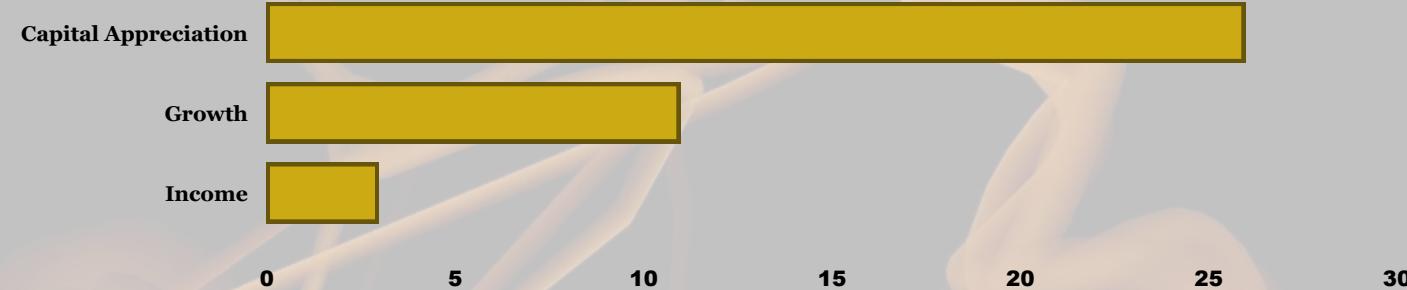
*Pearson Correlation*



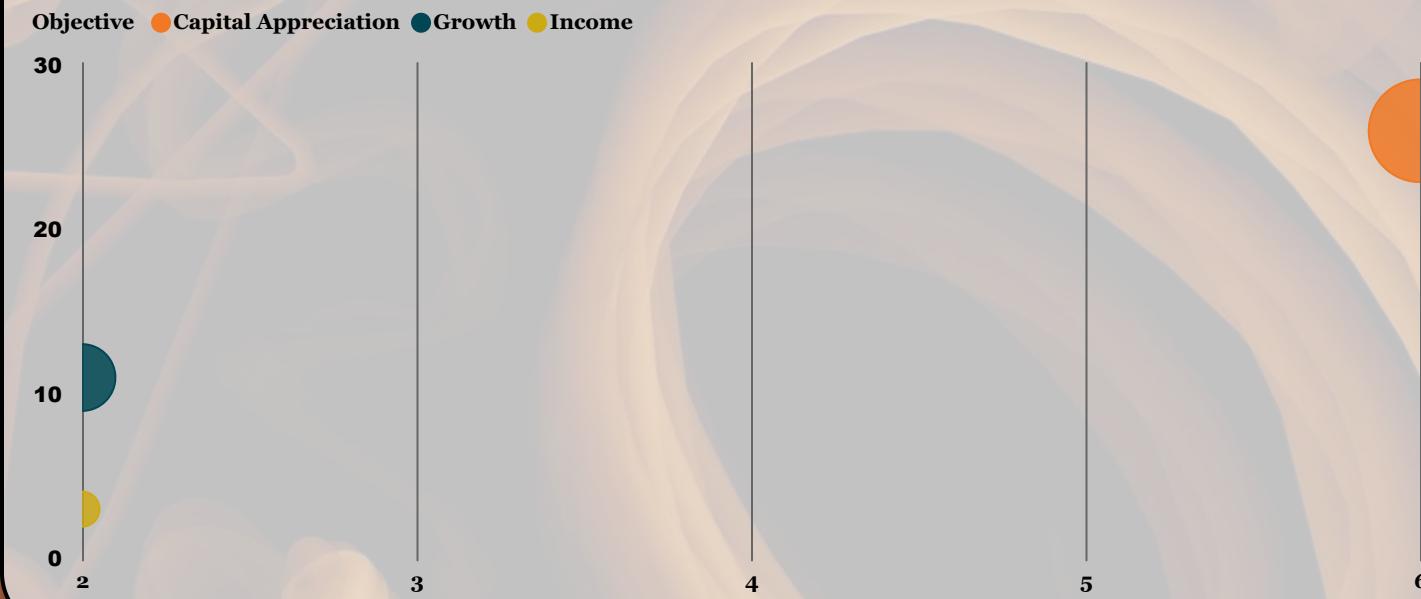
## Key Insights:

Capital appreciation is most linked to Equity; Income objectives align with Fixed Deposits.

### *Avenue by Objective*



### *Relationship Between Equity and Mutual Funds*



# Investment Duration and Frequency

10

*Equity*

9

*Fixed Deposits*

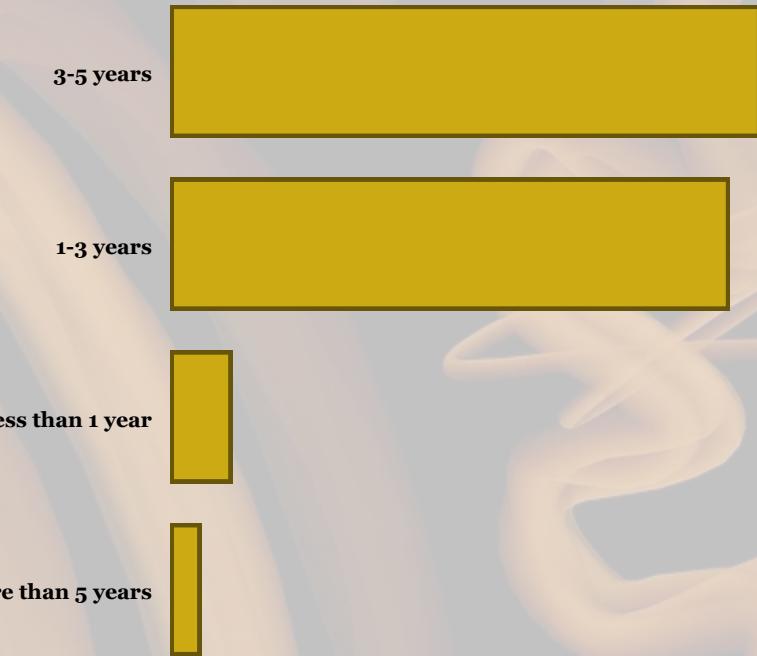
18

*Mutual Fund*

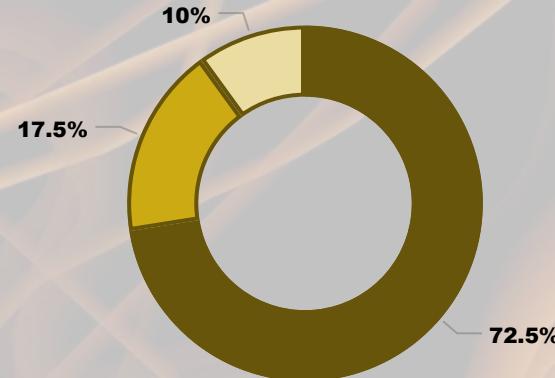
3

*Public Provident Fund*

**Investment Duration Distribution**



**Investment Monitoring Frequency**



## Key Insights:

- Majority of investments last 3–5 years and are monitored monthly.
- Daily monitoring is rare and linked to short-term investments.

**Avenue**

*Equity*

*Fixed Deposits*

*Mutual Fund*

*Public Provident Fund*

# Reasons for Investment

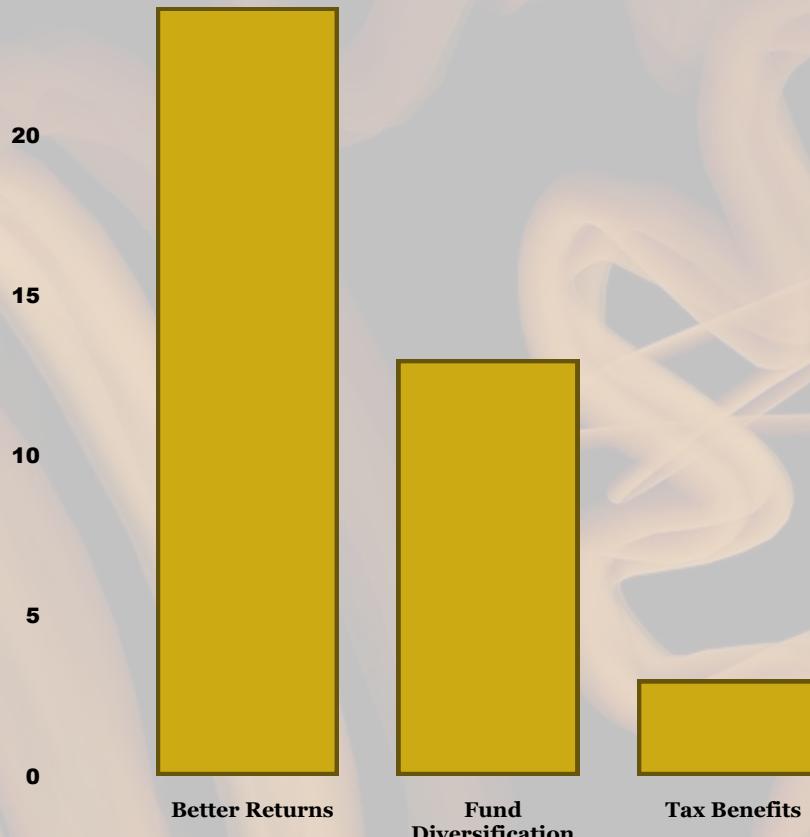
Reason Mutual

**Better Returns**

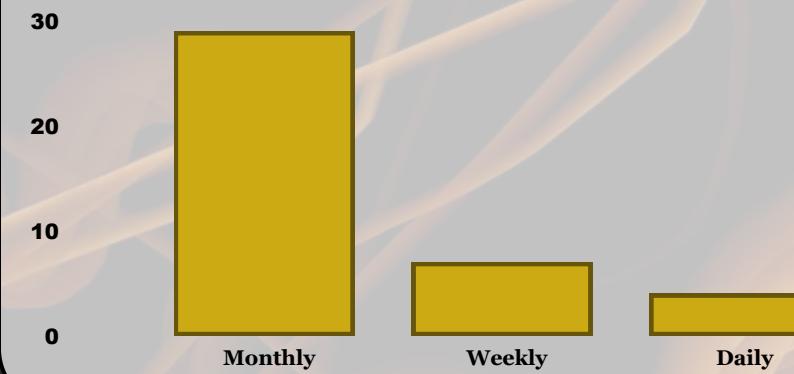
**Fund Diversification**

**Tax Benefits**

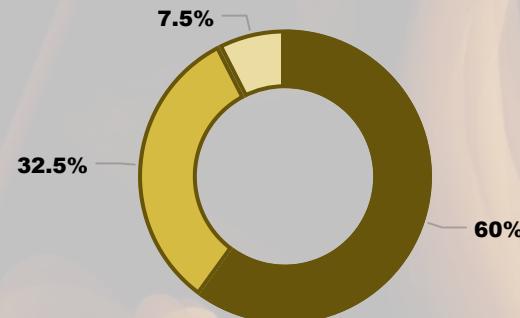
## Primary Reasons for Investment



## Avenue by Invest Monitor



## Distribution of Investment Reasons



**24**  
**Better Returns**

**13**  
**Fund Diversification**

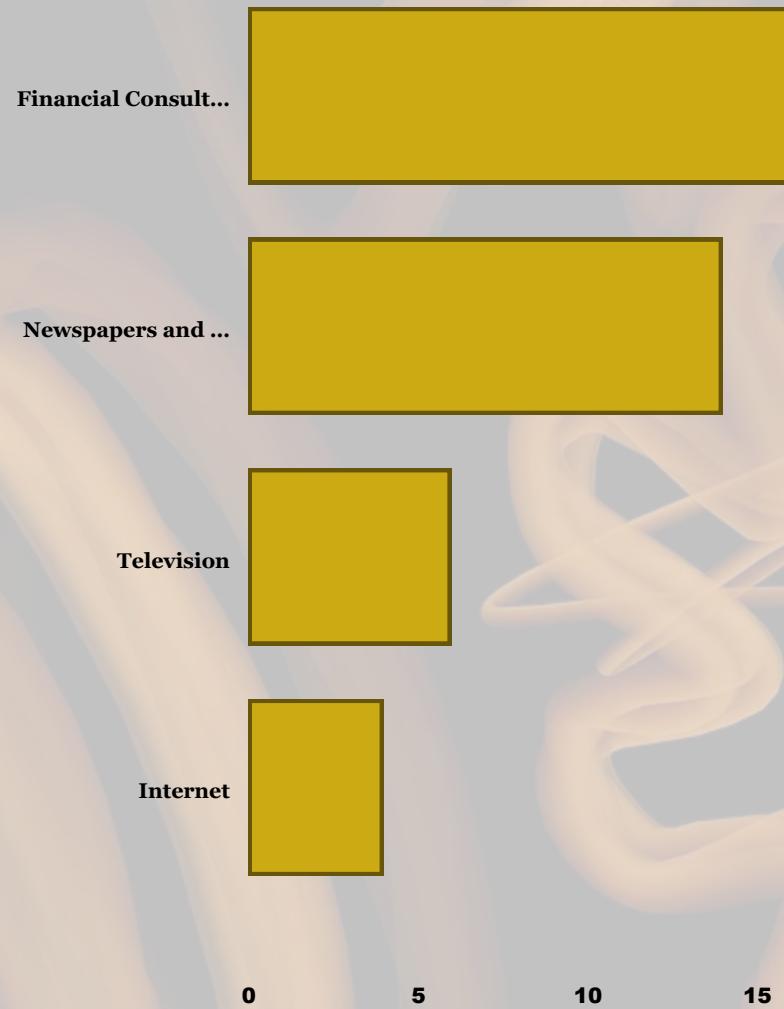
**3**  
**Tax Benefits**

## Key Insights:

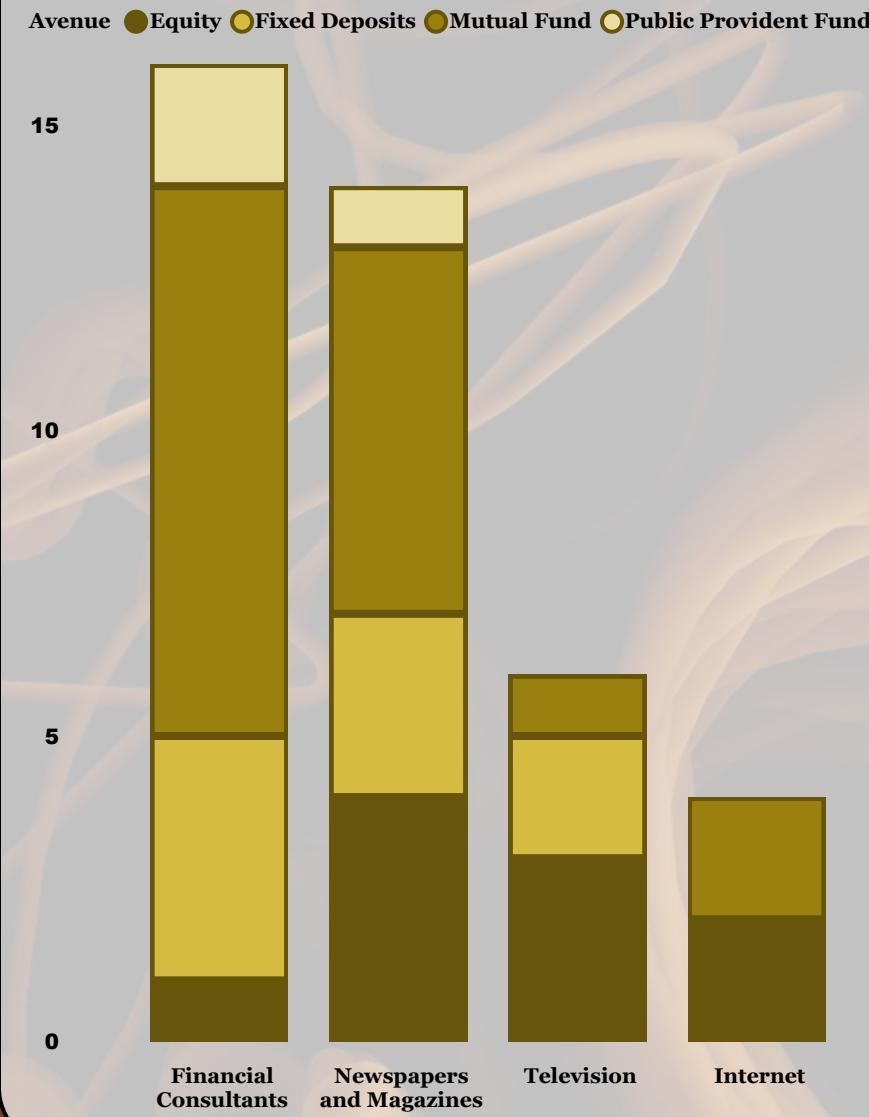
- Better Returns dominate investment motivations, followed by Diversification.
- Tax Benefits are least common motivation in this dataset.

# Source of Information

## Most Trusted Investment Information Sources



## Investment Avenue Preference by Source



## Reason Mutual

Better Returns

Fund Diversification

Tax Benefits

## Key Insights:

- Internet is the most common source, especially for Equity and Mutual Funds.
- Financial Consultants play a bigger role for Government Bonds and Fixed Deposits.

# Combined Insights

**27.80**  
Average Age



**25**  
Male Count



**15**  
Female Count



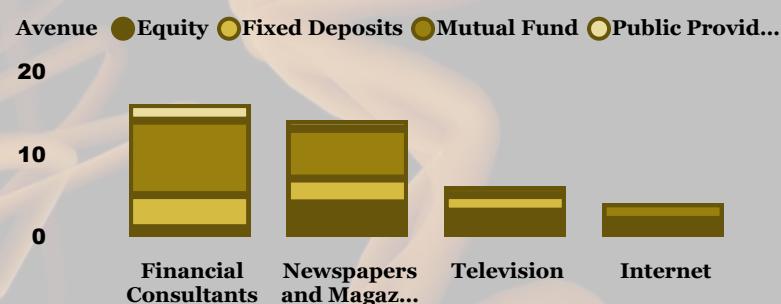
**1.00**  
Invested %



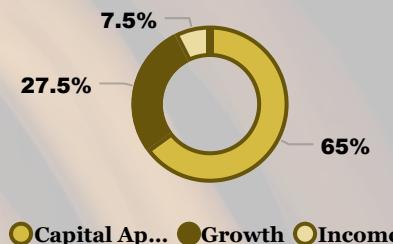
## Key Insights:

- Young, engaged investors — Avg. age 27.8; 92.5% hold investments, with Mutual Funds & Equity leading across most demographics.
- Returns drive decisions — Better returns and diversification dominate motives; internet is the top source for financial guidance.

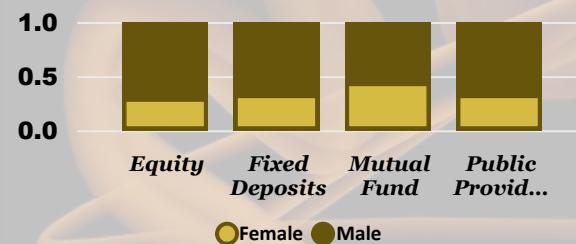
## Investment Avenue Preference by Source



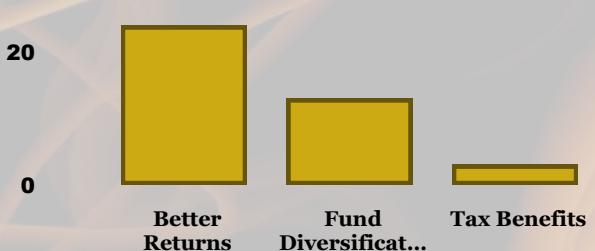
## Individuals by Savings Objectives



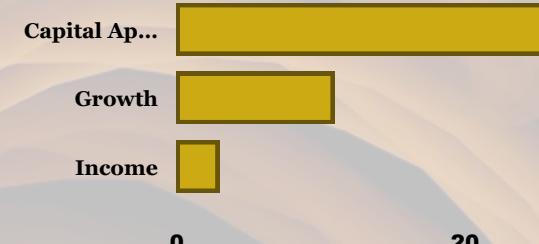
## Gender Proportion by Investment Avenue



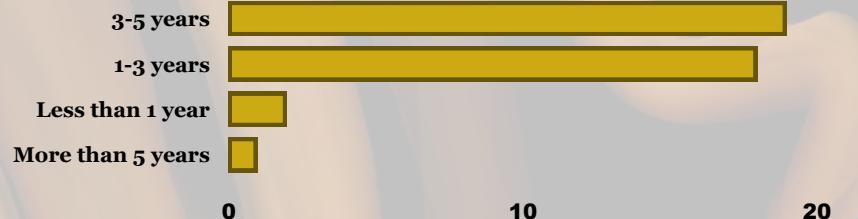
## Primary Reasons for Investment



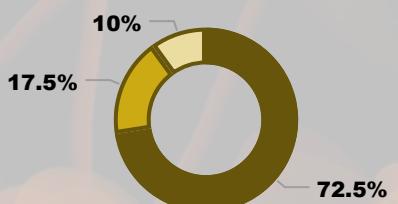
## Avenue by Objective



## Investment Duration Distribution



## Investment Monitoring Frequency



## Most Trusted Investment Information Sources

