



# MUTUAL FUND INVESTMENT

RECOMENDATION  
BASED  
ON  
CUSTOMER  
RISK PROFILE

---

## Capital Market Investors

---

# 10M

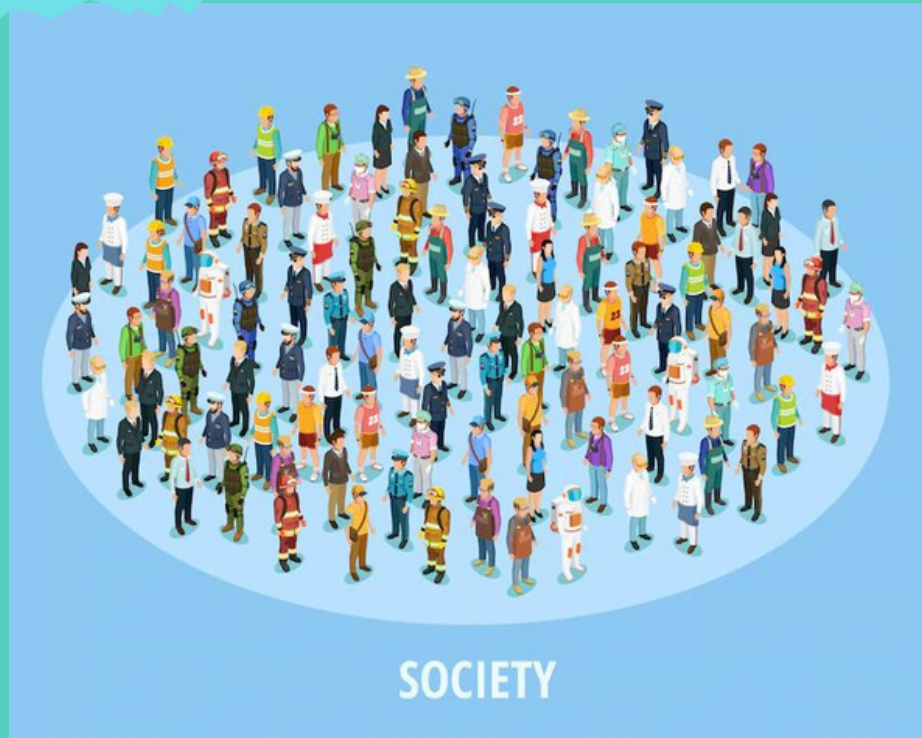
---

source :

<https://dataindonesia.id/bursa-keuangan/detail/jumlah-investor-pasar-modal-tembus-1015-juta-pada-november-2022>



# INVESTMENT



Interest :  
Prepare their financial  
future

Problems :

- Limited Knowledge
- Limited Time for Learning and Analysis
- Fear of loss

**RISK**



**Fundamental  
Knowledge**



# ANMINVE\$TING



Aan  
Nurliyanah



Ajeng  
Nilta Adriani



Fachmi  
Maris



Muhammad  
Fawwaz  
Dynoeputra

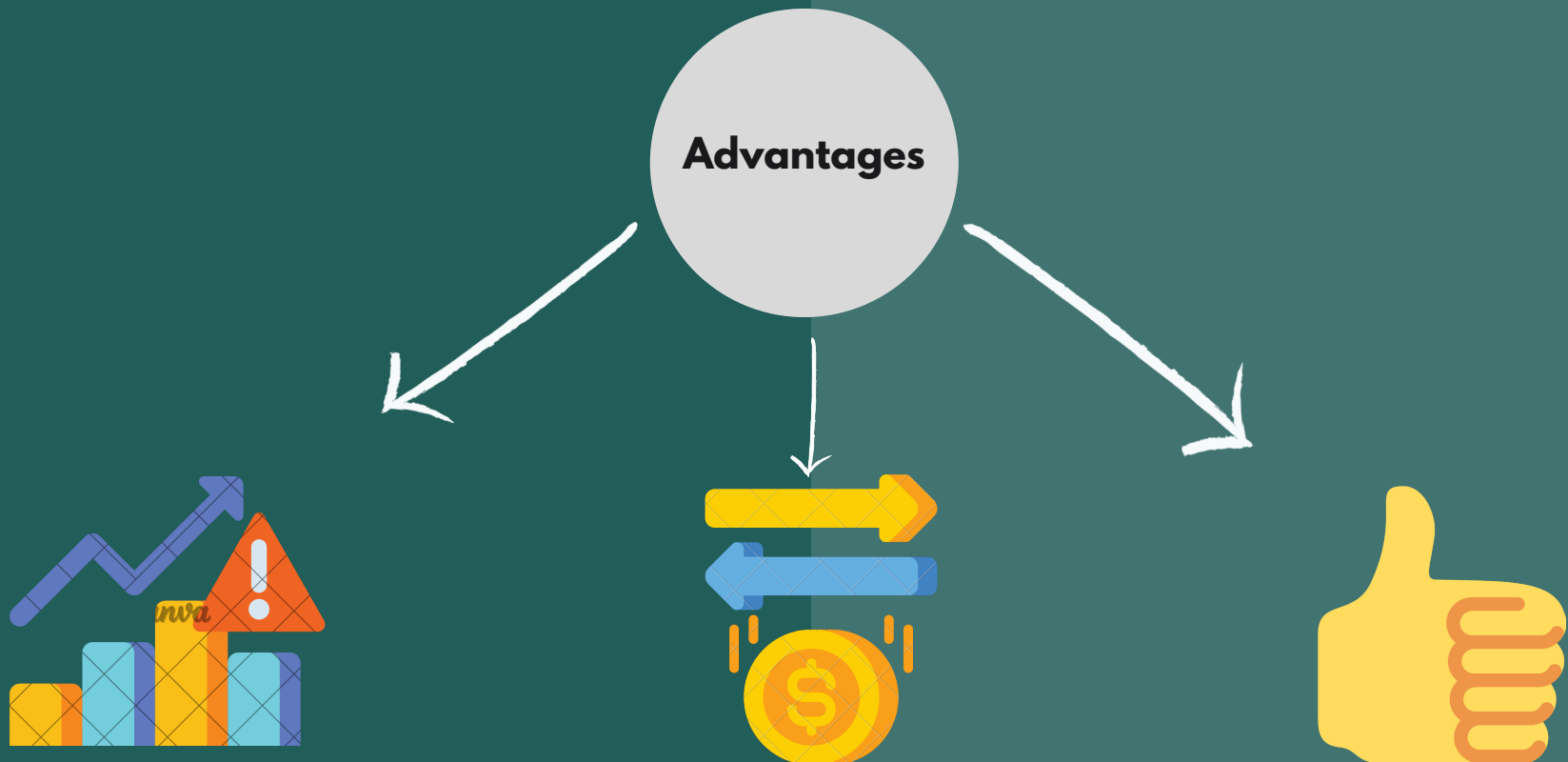


Ropiudin



# MUTUAL FUND

A vehicle through which funds from the general public are collected and invested in a portfolio by the Investment Manager.





# PROBLEM STATEMENT

---



Give A Mutual Fund Recommendation  
Based On Customer Risk Profile

---

**CANDIDATE  
INVESTORS**

```
graph TD; A[CANDIDATE INVESTORS] --> B((ACKNOWLEDGE RISK)); A --> C((CHOOSE PRODUCTS));
```

A diagram on a teal background. At the top center is a light blue rounded rectangle containing the text 'CANDIDATE INVESTORS'. Two arrows point downwards from the bottom corners of this rectangle. The left arrow points to a light pink circle containing the text 'ACKNOWLEDGE RISK'. The right arrow points to a yellow circle containing the text 'CHOOSE PRODUCTS'.

**ACKNOWLEDGE  
RISK**

**CHOOSE  
PRODUCTS**





# ANMINVE\$TING Workflow



## PHASE 1

Dataset gathering  
based on a  
customer  
questionnaire

## PHASE 2

Classifying  
Customer by their  
Risk Profile

## PHASE 3

Mutual Fund  
Recommendation  
based on  
Classification

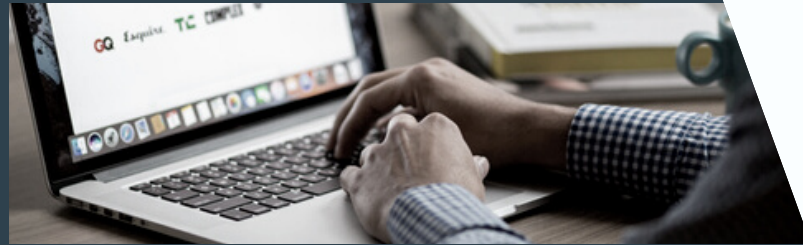
## PHASE 4

Show Future  
Predictions

# DATASET

The dataset consists of 10.000 data based on a customer questionnaire

- 1.Age
- 2.Expenses
- 3.Financial Status
- 4.Experience
- 5.Estimated Period
- 6.Unwilling to Accept
- 7.Scenario
- 8.Sum Score (Target)
- 9.Salary





**Risk Profile  
Classification**

**1 (Very Cautious)**

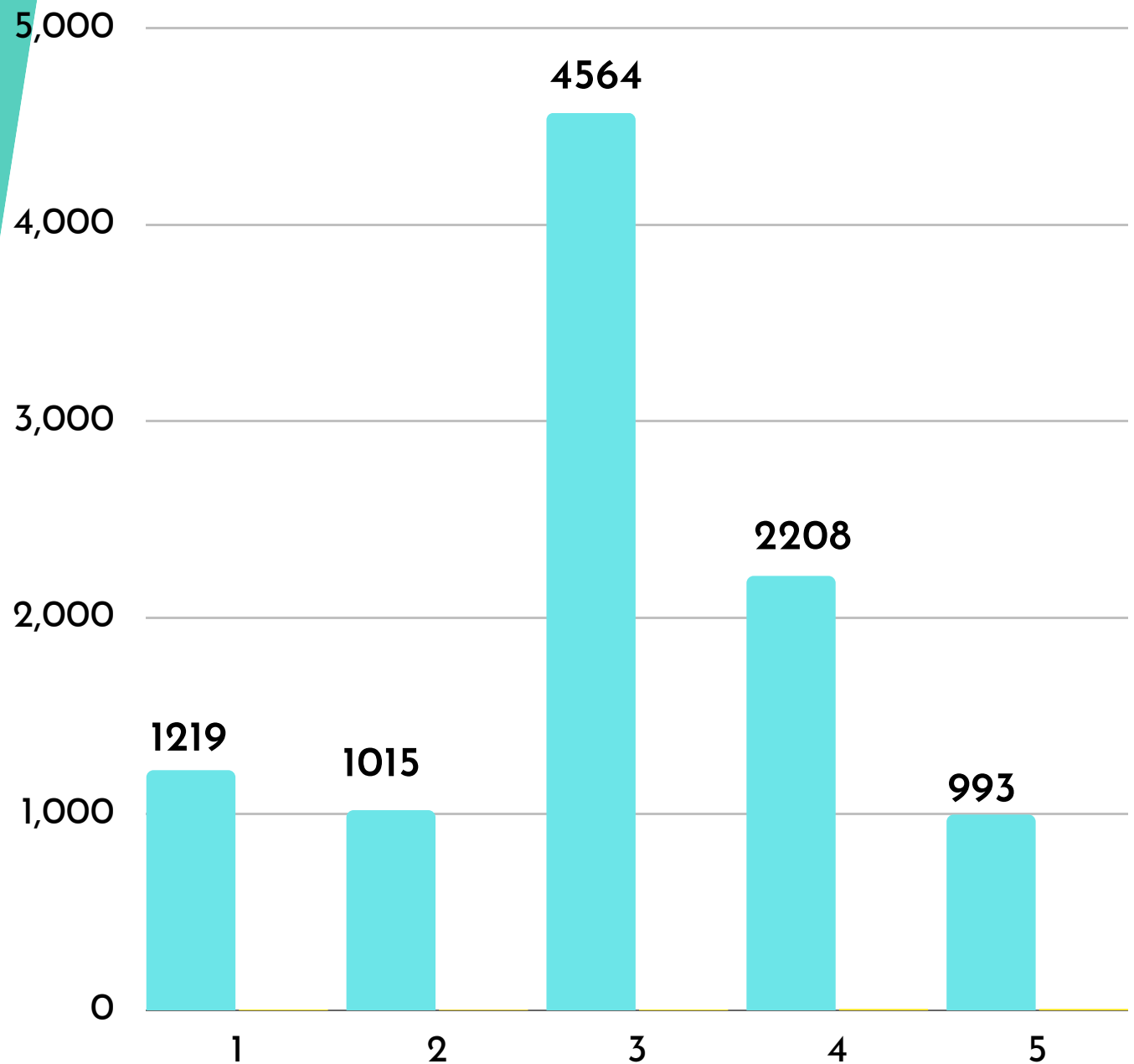
**2 (Cautious)**

**3 (Balanced)**

**4 (Adventurous)**

**5 (Speculative)**

# Data of Risk Profile Classification



# Type of Mutual Fund Recommendations



```
graph TD; A[Type of Mutual Fund Recommendations] --> B[Money Market]; A --> C[Fixed Income]; A --> D[Balanced Fund]; A --> E[Equity Fund];
```

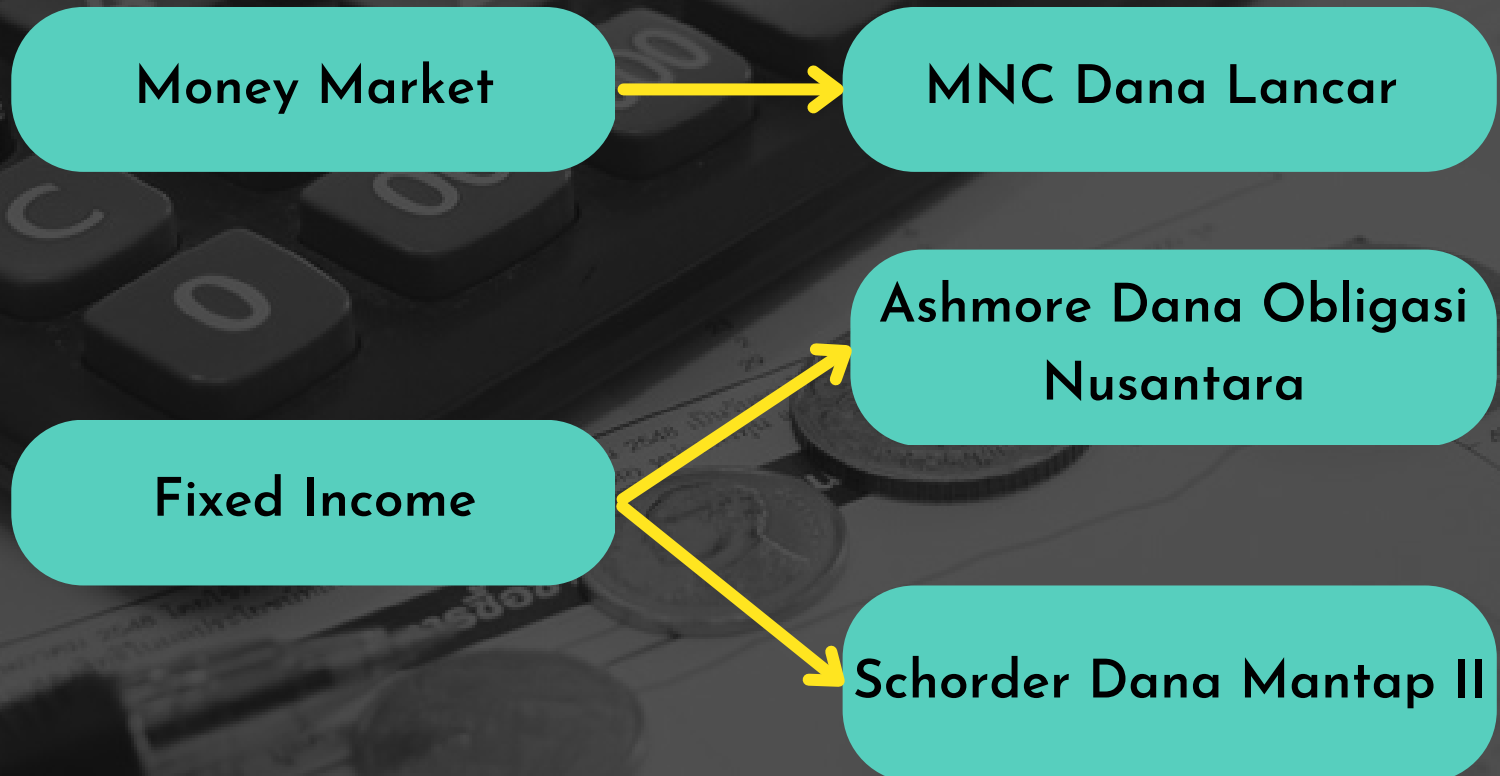
Money Market

Fixed Income

Balanced Fund

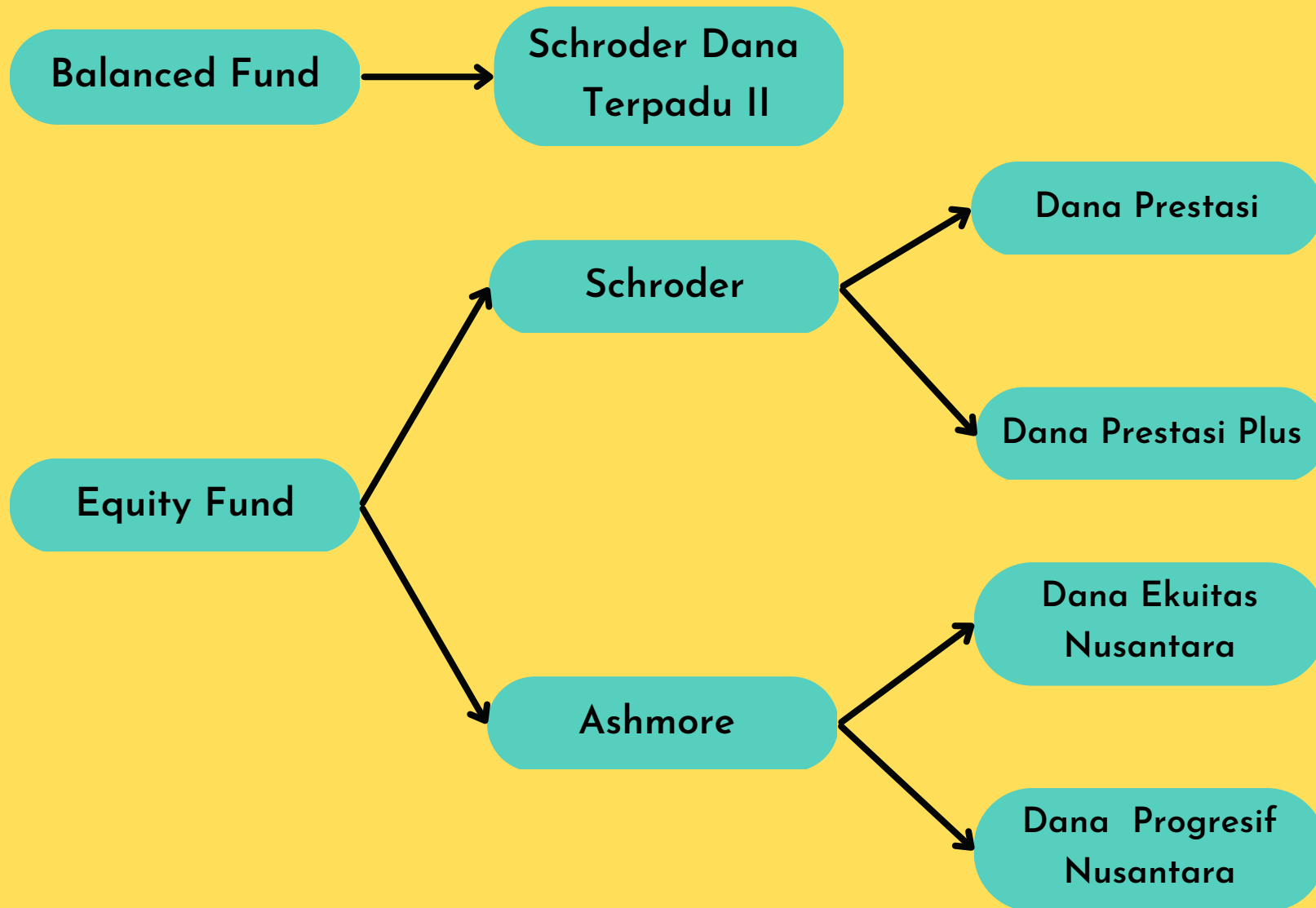
Equity Fund

# Mutual Fund Recommendation based on Classification Result





# Mutual Fund Recommendation based on Classification Report






**Selected  
Product**



**Price  
Forecasting**



Navigation Bar

 [Find your Risk Profile](#)

 [What is Mutual Funds?](#)

# Anminve\$ting

How are you investing today?



# Conclusion

Advantages

Limitation

Future  
Improvement





*Thank You*

**FOR YOUR ATTENTION**

ANMINVE\$TING