**📊 Executive Insight Report – Stock Analysis Dashboard**

**📄 Project Summary**

This Power BI Dashboard provides a comprehensive analysis of stock performance for four companies: **Zorto, Maxp, Survelia, and Jecco**, based on time series data. It includes key financial metrics, technical indicators, and company-wise evaluations. The dashboard is divided into thematic pages to deliver both high-level summaries and in-depth insights.

**📄 Page 1: Executive Summary**

**✅ KPI Cards**

* **Total Return**
* **Sum of Daily Return**
* **Average Risk by Value**
* **Sum of Stock Value**
* **Average Risk by Daily Return**

**📈 Visuals**

1. **Stock Value Trend Over Time**
   * **Chart Type**: Multiline Chart (Small multiples by company)
   * **Insight**: Displays trends in stock value over the selected period.
2. **Risk vs Return Scatter Chart**
   * **Insight**: Compares companies on the basis of their average risk and return.
3. **Donut Chart: Company-Wise Stock Share**
   * **Insight**: Proportion of total stock value held by each company.
4. **Matrix Table**
   * **Rows**: Document Date
   * **Columns**: Company
   * **Values**: Sum of Daily Return, Total Return %
5. **Slicer**
   * **Filters**: All visuals by Company
   * **Insight**: Dynamic interaction across all charts and pages.

**📄 Page 2: Company Analysis**

**📊 Visuals**

1. **Clustered Bar Chart**
   * **Insight**: Compares company performance by key metrics (e.g., Return %, Volatility).
2. **Waterfall Chart**
   * **Insight**: Shows step-by-step contribution of daily returns over time or by company.
3. **Decomposition Tree**
   * **Insight**: Breaks down total return using hierarchical company-wise or date-wise filters.
4. **Key Influencer Visual**
   * **Insight**: Analyzes what factors influence total return percentage (fields adjusted to extract insights).
5. **Slicer**
   * **Insight**: Dynamic interaction across all charts and pages.

**📄 Page 3: Technical Indicators**

**📉 Visuals**

1. **14-Day Moving Average vs Actual Price**
   * **Chart Type**: Line Chart
   * **Insight**: Smoother trend view and signal detection.
2. **14-Day Volatility (Rolling STD of Returns)**
   * **Chart Type**: Line Chart
   * **Insight**: Indicates recent risk in stock performance.
3. **RSI or MACD**
   * **Type**: Custom Calculated Indicator (Line or other visual)
   * **Insight**: Technical momentum tracker (RSI) or trend strength (MACD).

**📌 Design and Usability Highlights**

* **Dynamic Slicer** shared across all pages for seamless filtering.
* **Color Theme**: Professional tones, consistent layout, and easy-to-read fonts.
* **Avoided Repetitive Chart Types** to maintain visual versatility and clarity.

**🔚 Final Notes**

* The dashboard is now finalized.
* All pages are consistent, responsive to slicer selections, and provide actionable insights.