Fidelity Investment Dashboard Summary

Dashboard Approach

This dashboard was created using sample customer, portfolio, and transaction data. Key performance indicators (KPIs) such as Total Portfolio Value, Total Transactions, Average ROI, Buy Count, and Sell Count were calculated using DAX measures. Slicers for Location, Risk Level, and Date were added to enable dynamic filtering of visual insights.

The bar chart visualizes asset distribution by risk level, and the line chart shows transaction activity over time.

Embedding Note

This dashboard can be securely embedded within a web application using Power BI's embedding capabilities.

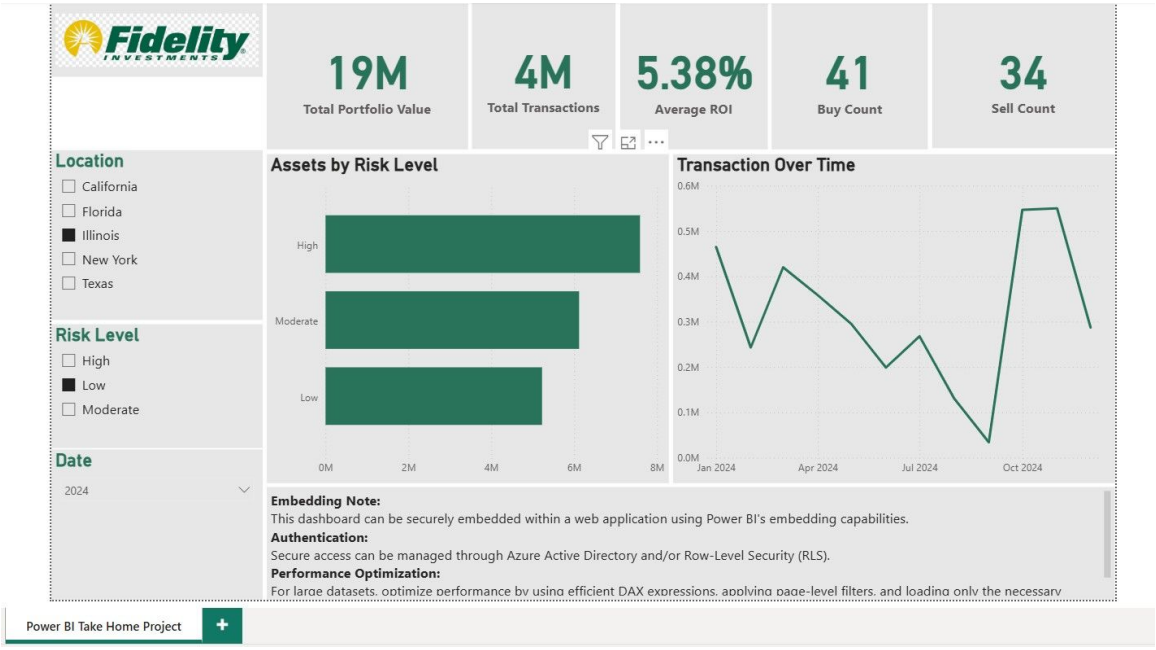
Authentication

Secure access can be managed through Azure Active Directory and/or Row-Level Security (RLS).

Performance Optimization

For large datasets, optimize performance by using efficient DAX expressions, applying page-level filters, and loading only the necessary columns to reduce data consumption.

Dashboard Screenshot



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