

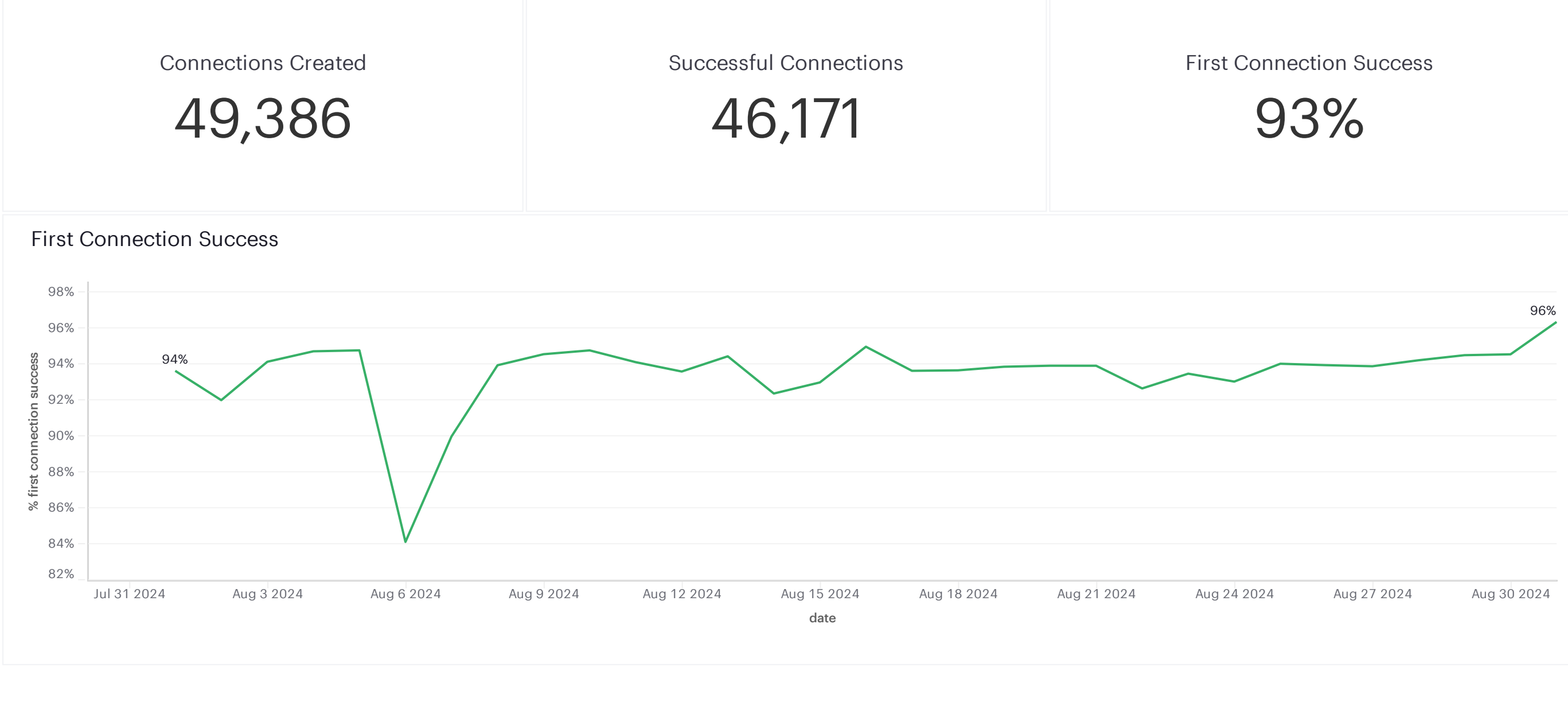
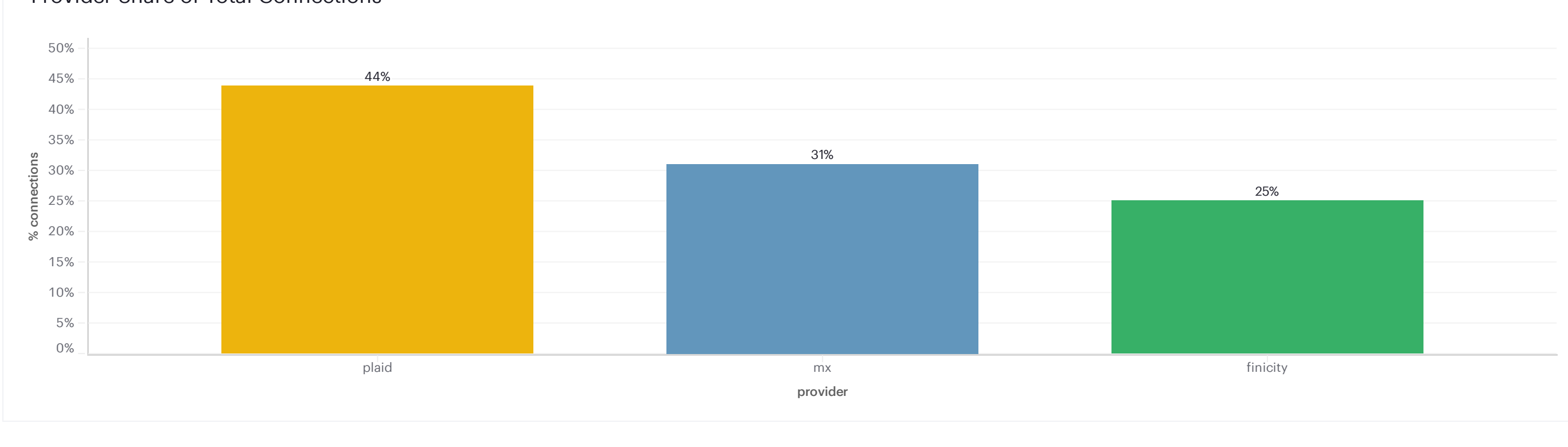
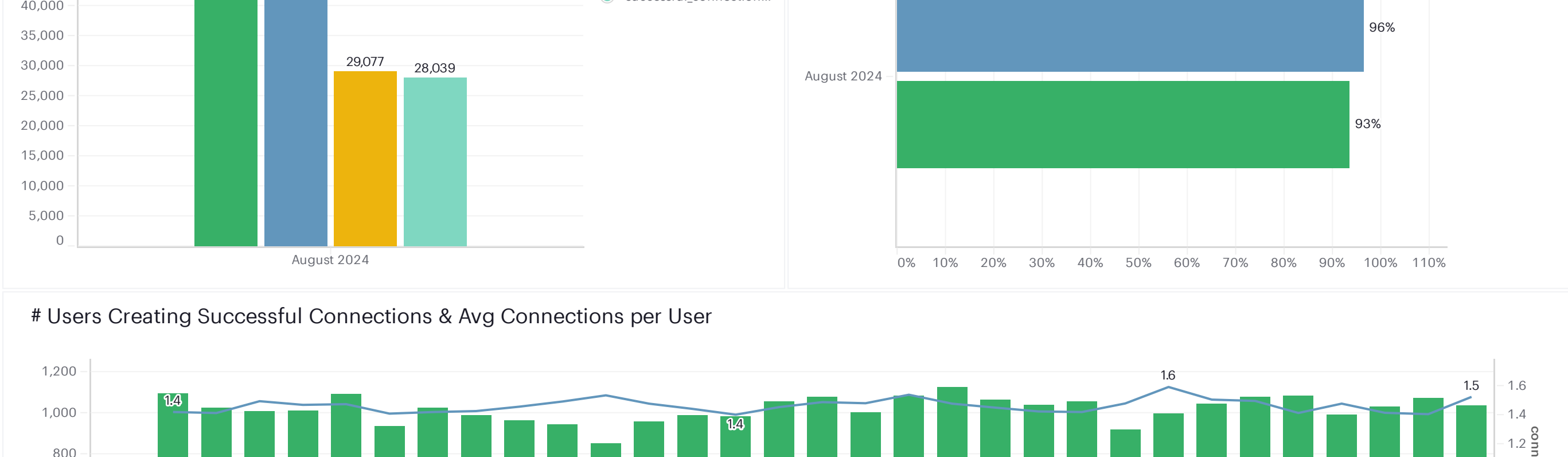
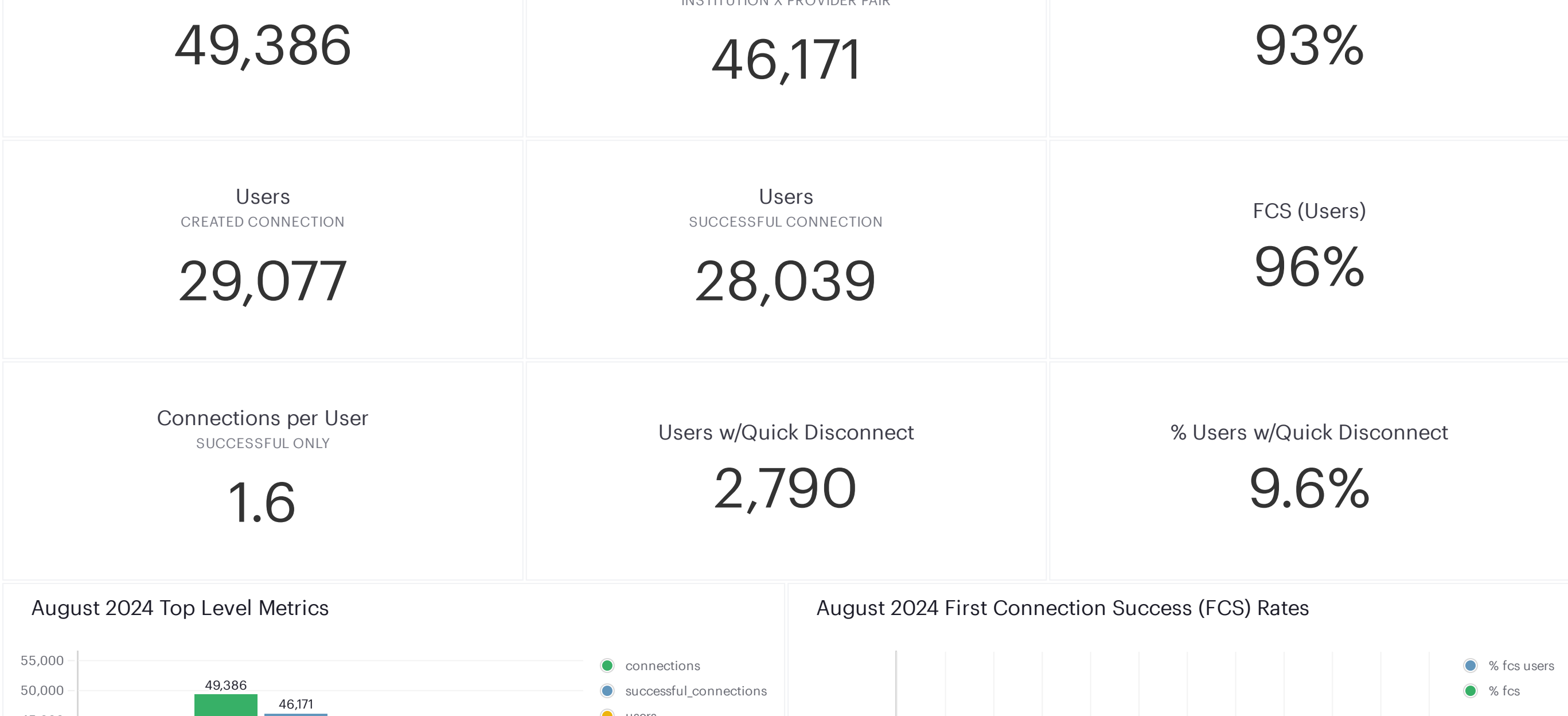
Monarch Money Data Take Home

Josh Erickson | Jan 23, 2025

Terminology

- **institution:** the bank the user is linking (e.g. Chase, Wells Fargo)
- **provider:** the data aggregator used to link the institution to Monarch (e.g. Plaid)
- **source:** the platform where the user initiates the link to their institution (e.g. web, mobile)
- **connection created:** user links their institution via provider to Monarch. Unique at the institution x data provider level
- **successful connection:** a link between Monarch and the institution that is connected for >= 24hrs without disconnection
- **First Connection Success Rate:** total # successful connections / connections created
- **First Connection Success Rate (Users):** # users with successful connection / # users created connections
- **Quick Disconnect:** connections that become disconnected within 24hrs of creation

Summary Stats

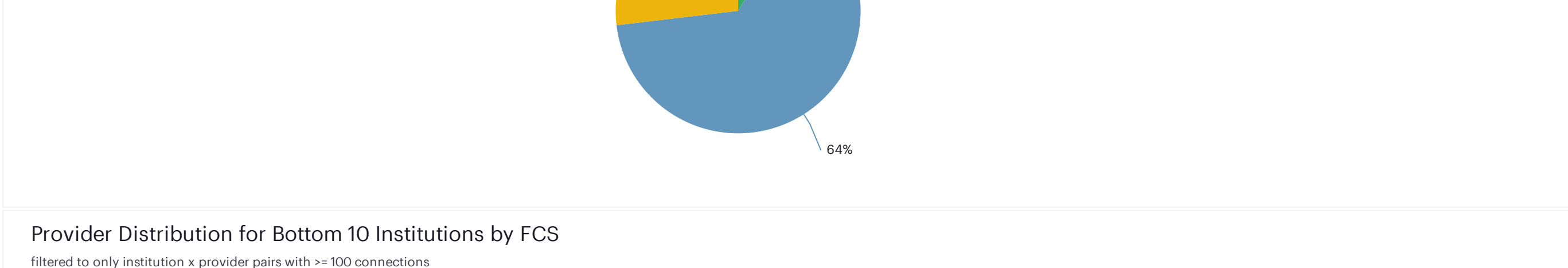
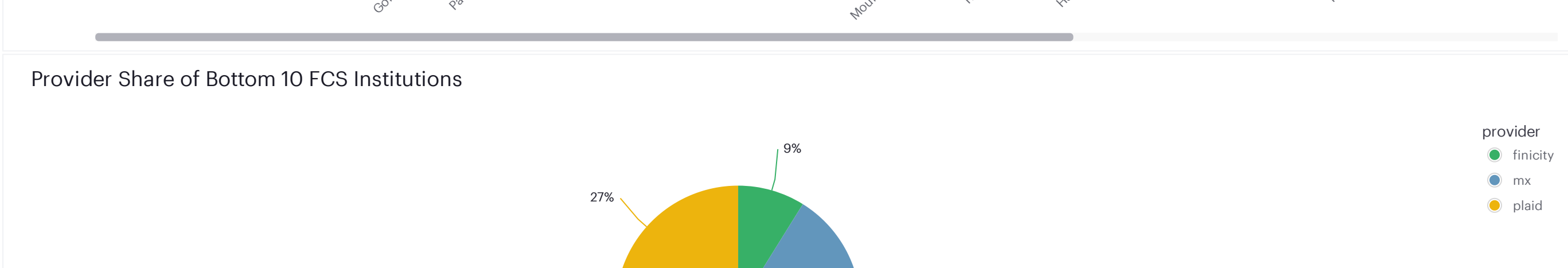
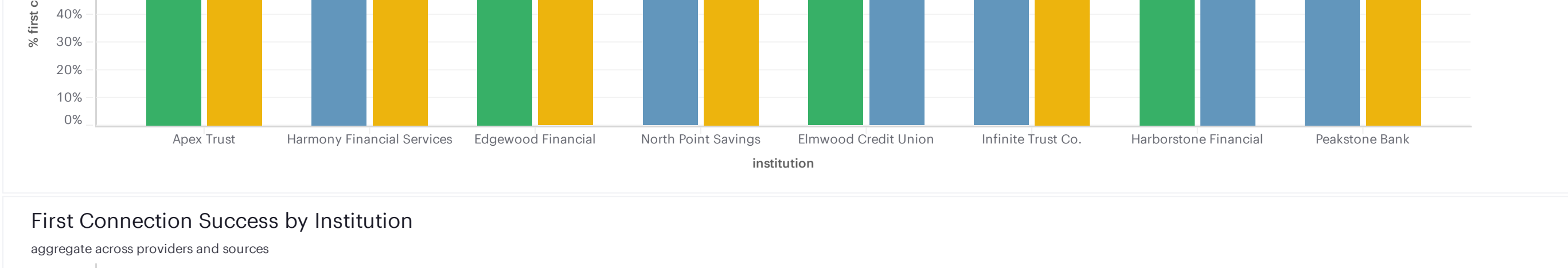
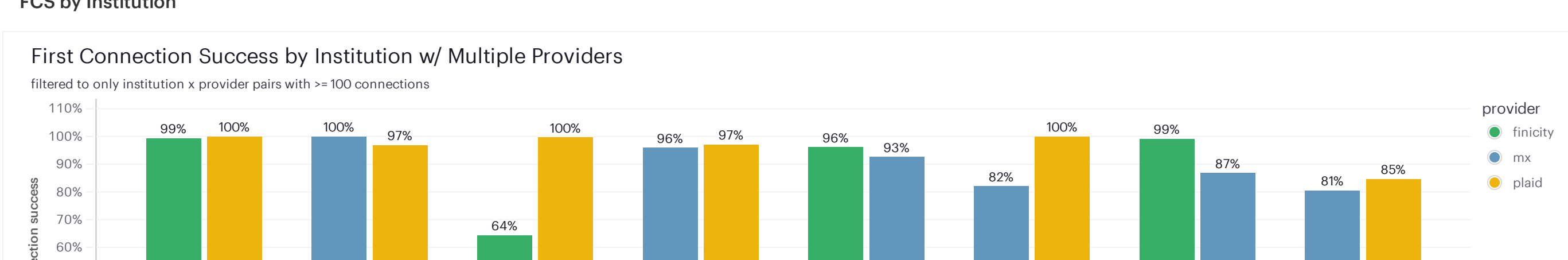
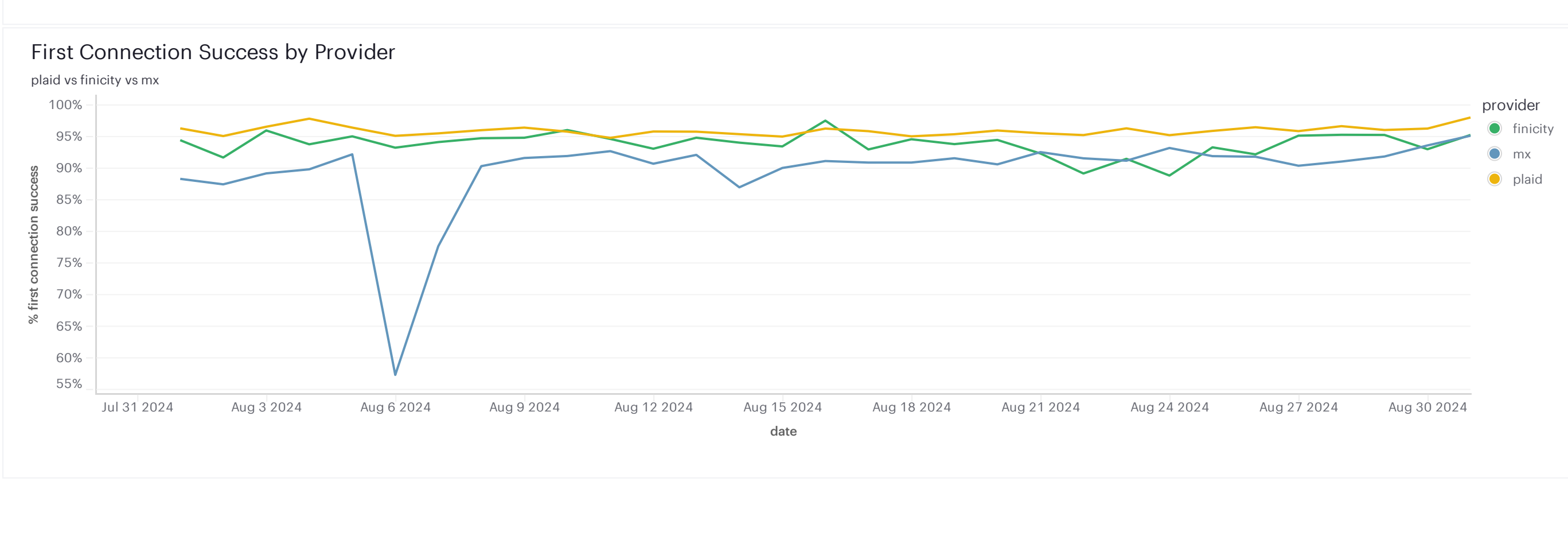
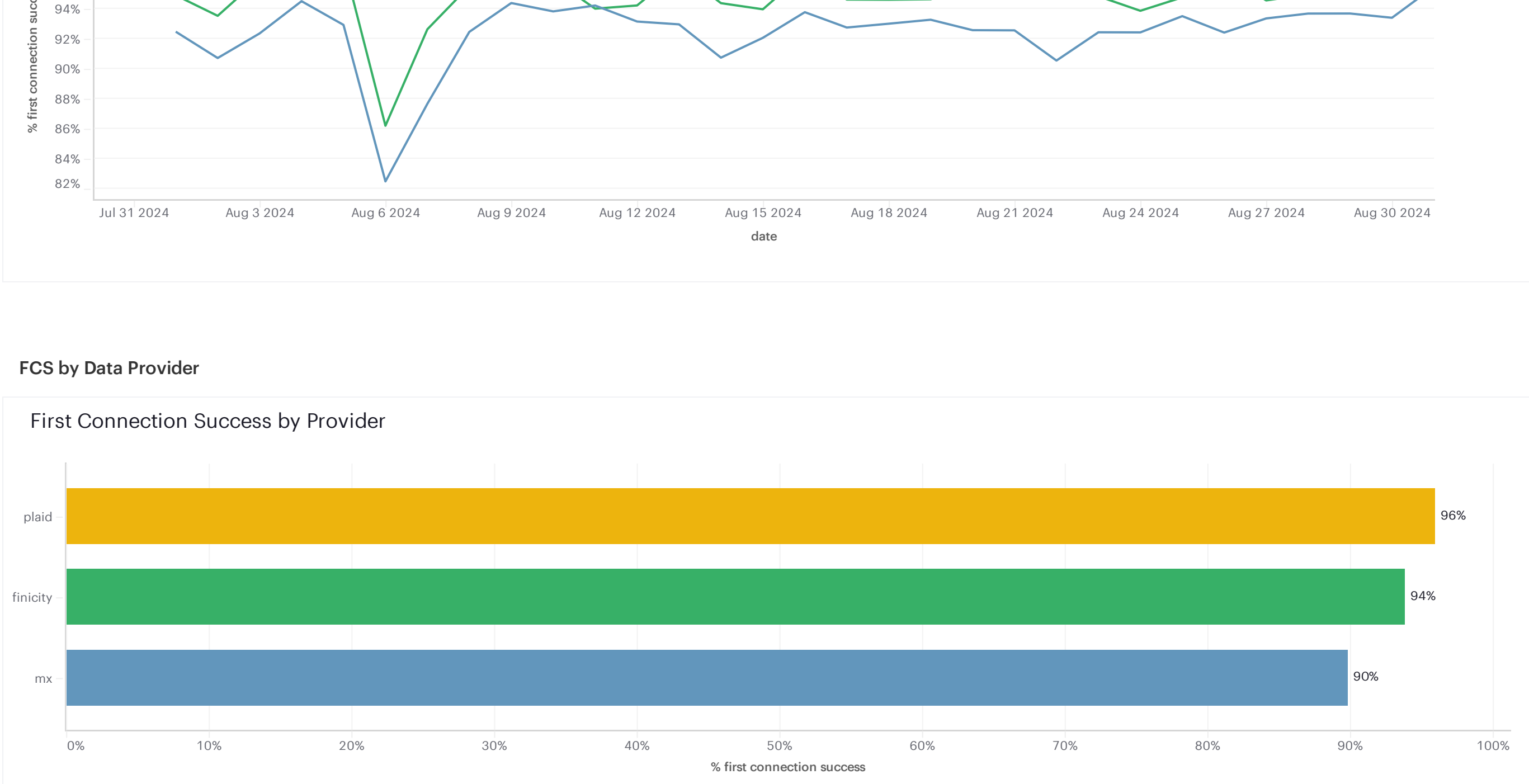
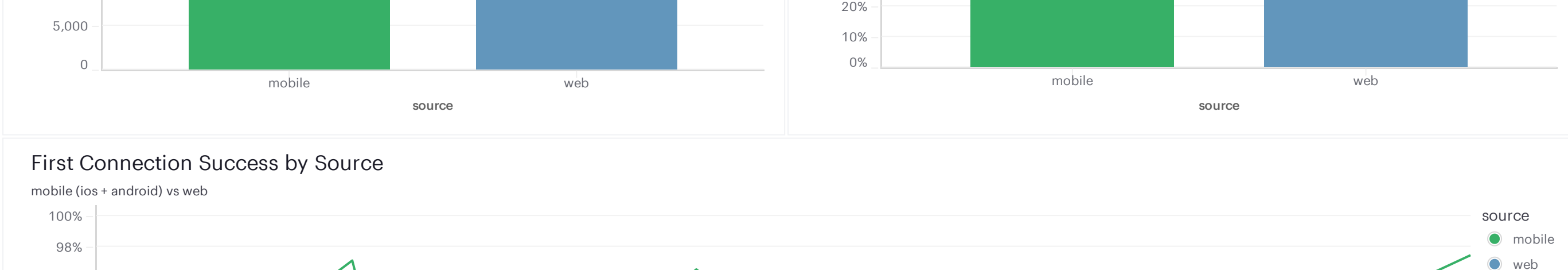
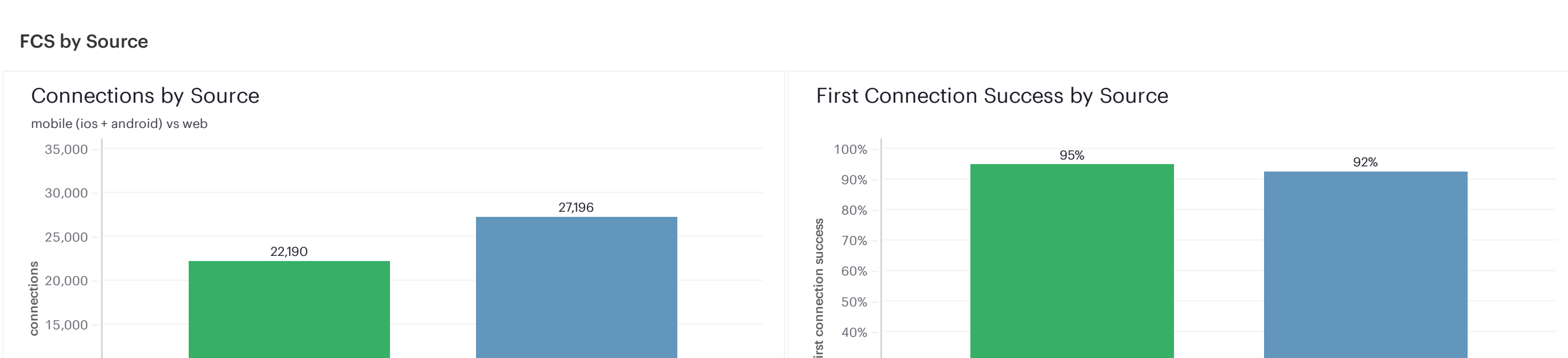


First Connection Success Quartiles

quartile	avg_fcs	institutions
4	100%	22
3	100%	22
2	95%	23
1	79%	23

<< Page 1 of 1 >>

Showing rows 1-4 of 4



Data Validation

Are there any events within a given table that are missing values for the field 'type'?

- Are there any duplicated event\_ids within each table?

type	events	distinct_events	null_rows
connect		94,233	0
created		83,054	0
disconnected		152,168	0

<< Page 1 of 1 >>

Showing rows 1-3 of 3

