

## Task 1: Data Exploration and Summary

27.80

Avg Age

37

Investment Avenue YES

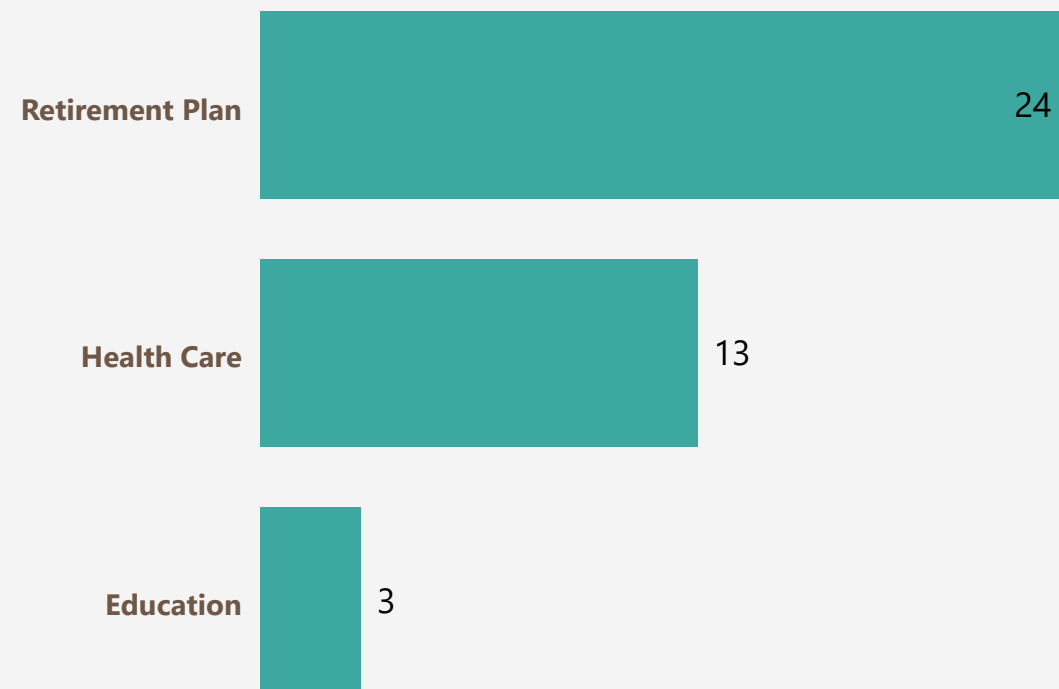
3

Investment Avenue NO

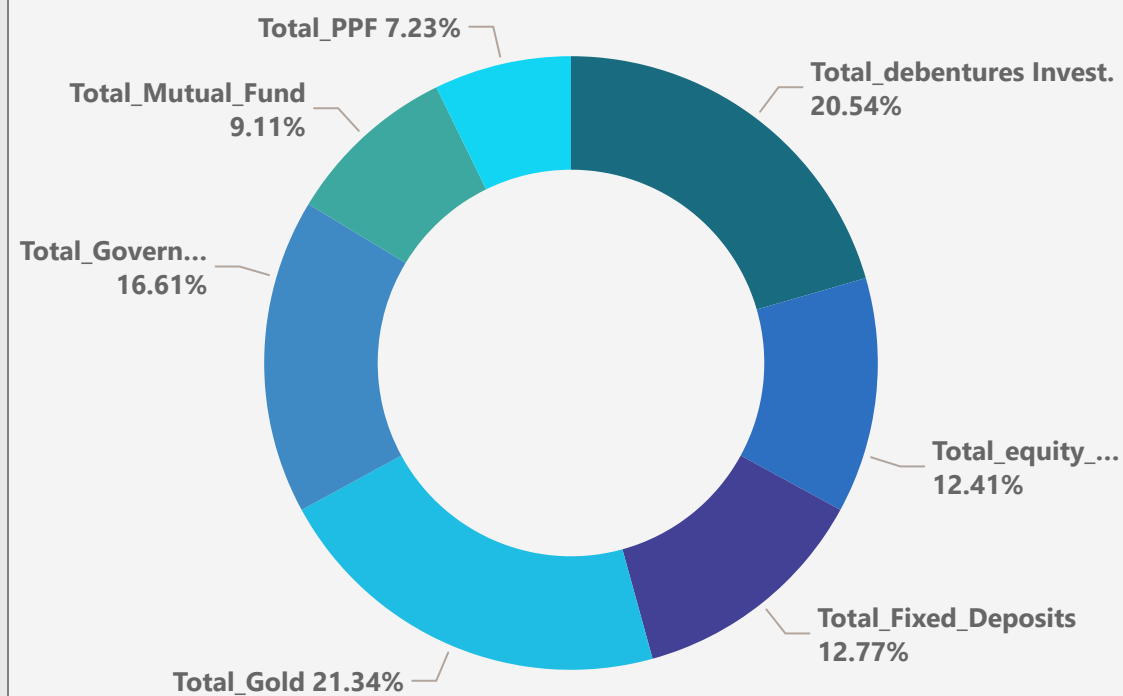
92.50

Investment Percentage

Count of gender by Savings objectives



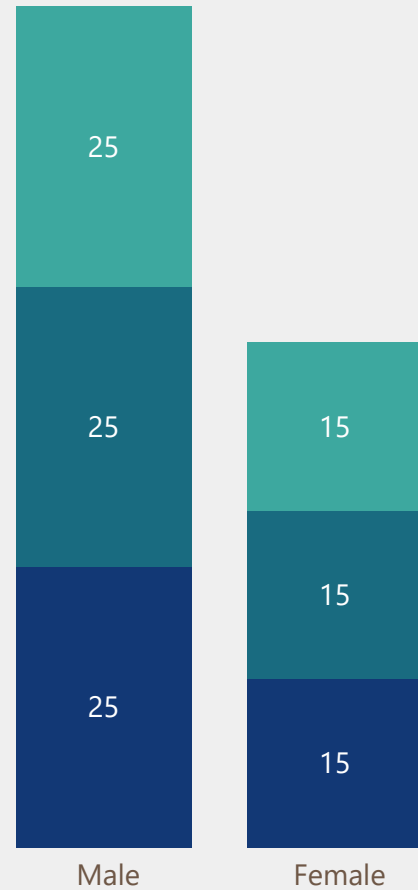
Total\_debentures Invest. , Total\_equity\_Market, Total\_Fixed\_Deposits, Total\_Gold, Total\_Government\_Bond, Total\_Mutual\_Fund and Total\_PPF



## Task 2: Gender - based Analysis

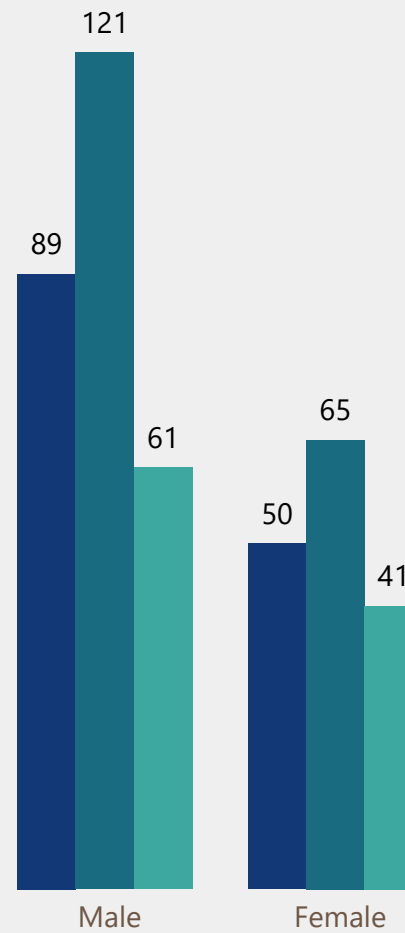
Count of Mutual\_Funds, Count of Government\_Bonds and Count of Equity\_Market by gender

● Count of Mutual\_Funds ● Count of Governme... ● Count of Equi...



Sum of Equity\_Market, Sum of Government\_Bonds and Sum of Mutual\_Funds by gender

● Sum of Equity\_Market ● Sum of Government... ● Sum of Mutual...

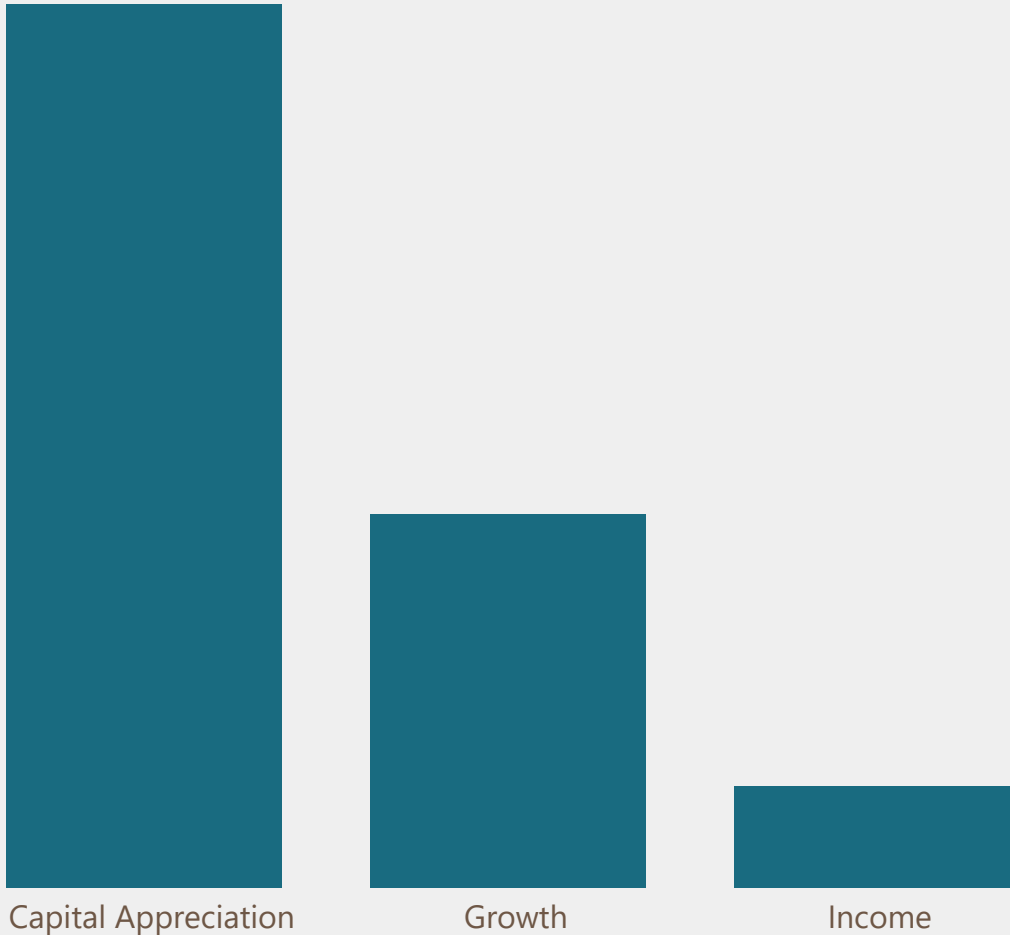


### Key Insights :

- Total no. of 25 male investors and 15 female investors in Mutual fund , Equity market and Government Bond.
- Highest investment in Government bond in case of male 121 and female 65.
- In case of Equity market , sum of investment amount male 89 and female 50.
- Lowest investment in mutual fund in case of male 61 and female 41.

# Task 3: Objective Analysis

Count of Avenue by Objective



Avenue

- Equity
- Fixed Deposits
- Mutual Fund
- Public Provident Fund

## Task 4: Investment Duration and Frequency

10

Equity

9

Fixed Deposits

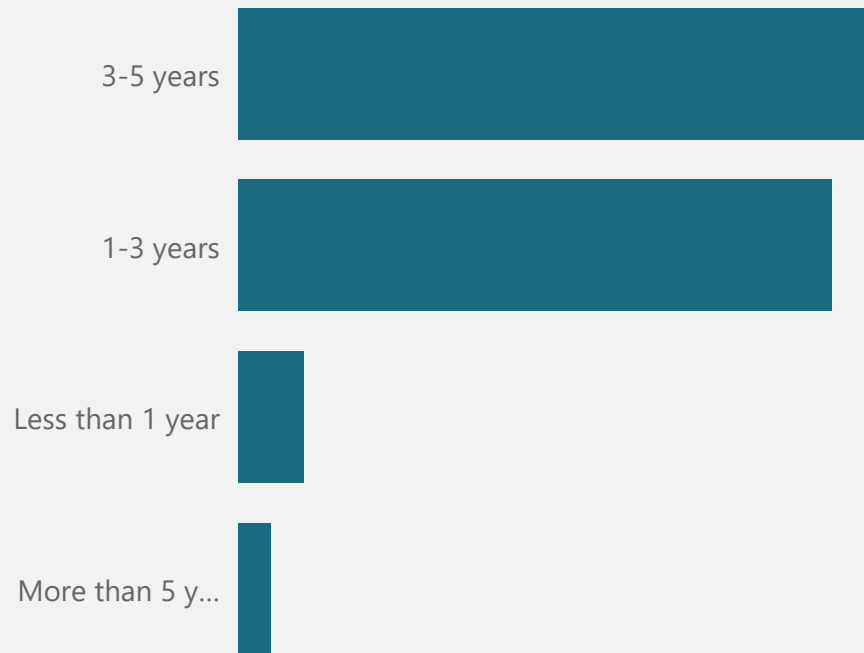
18

Mutual Fund

3

Public Provident Fund

Count of Avenue by Duration



Count of Avenue by Invest\_Monitor



Avenue



Equity

Fixed Deposits

Mutual Fund

Public Provident  
Fund

## Task 5: Reasons for Investment

24

Better Returns

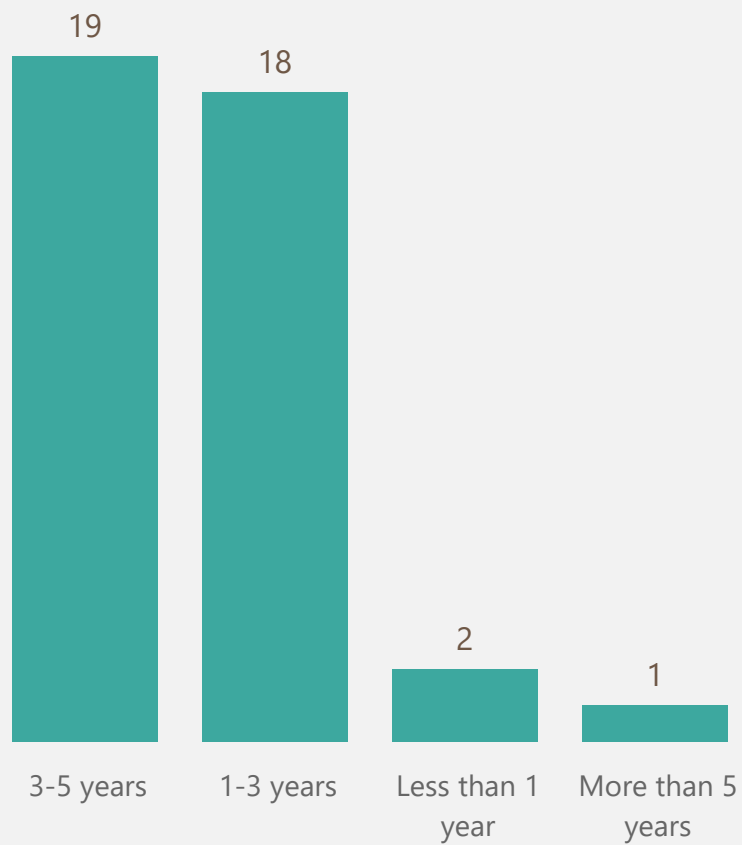
13

Fund Diversification

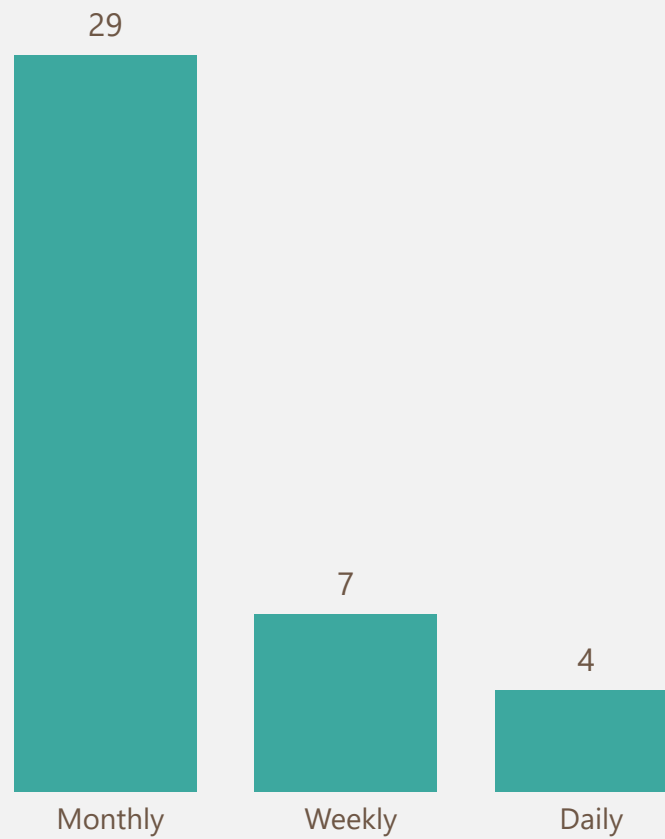
3

Tax Benefits

Count of Reason\_Mutual by Duration



Count of Reason\_Mutual by Invest\_Monitor



Reason\_Mutual

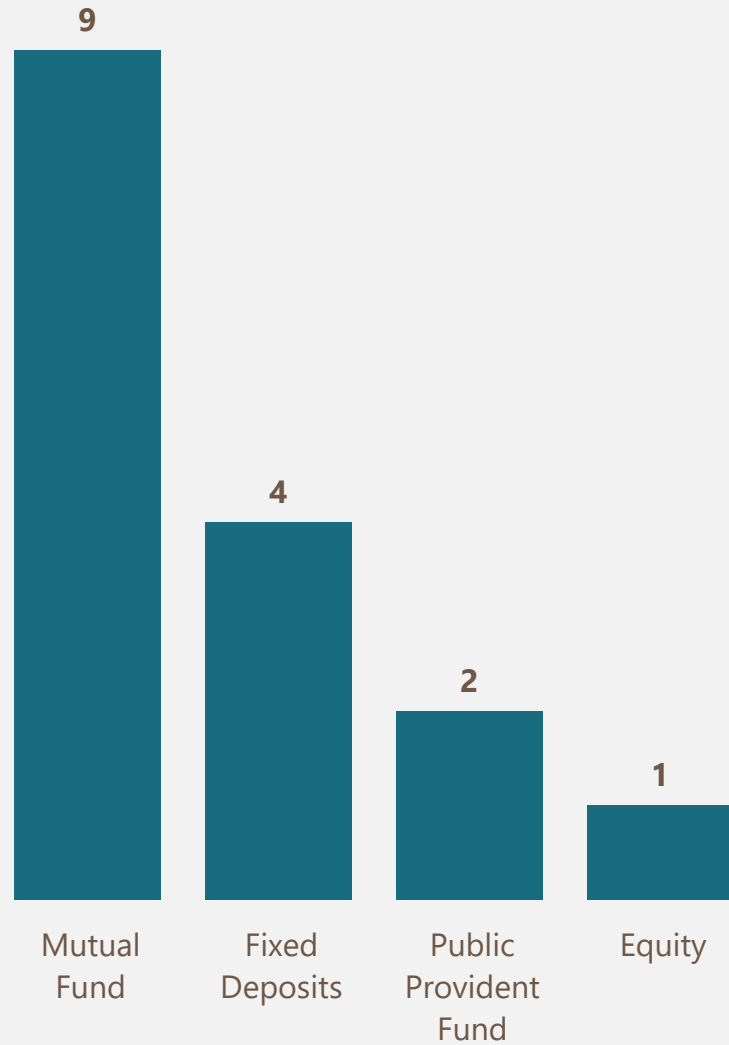
Better Returns

Fund Diversification

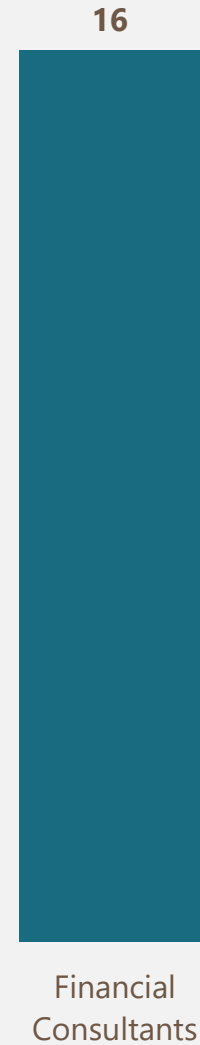
Tax Benefits

## Task 6 : Source of Information

Count of Source by Avenue



Count of Avenue by Source



Source



## Task 7: Final Dashboard

Reason\_Mutual

Better Returns

Fund  
Diversification

Tax Benefits

Avg Age

27.80



Male

25



Female

15

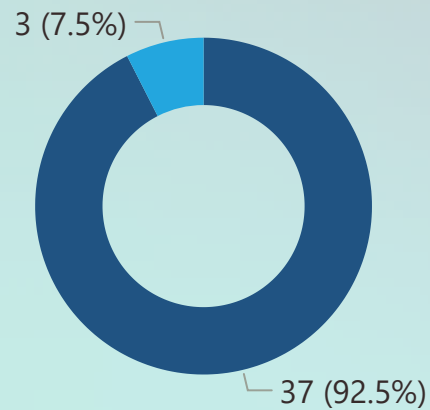


Total Investment %

92.50

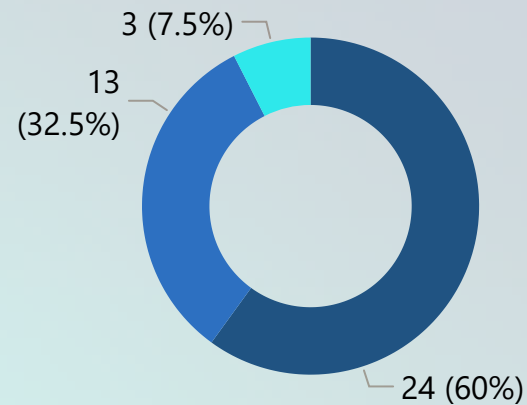


Individual by Investment\_Avenues



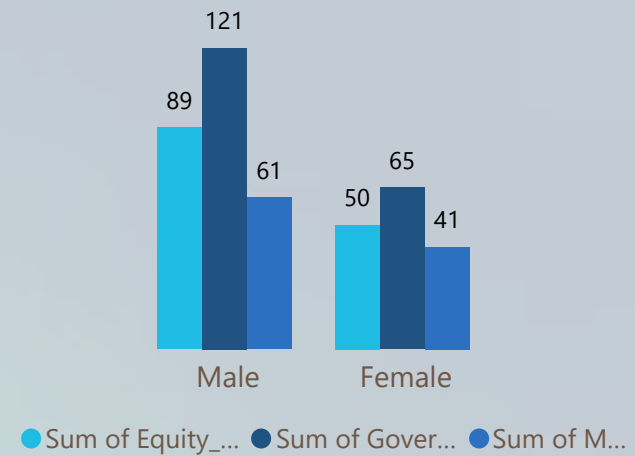
Investme... ● Yes ● No

Individuals by Savings objectives



What are ... ● Retirement ● Health Care ● Education

Sum of Equity\_Market, Government\_Bonds and Mutual\_Funds by gender



Avenue

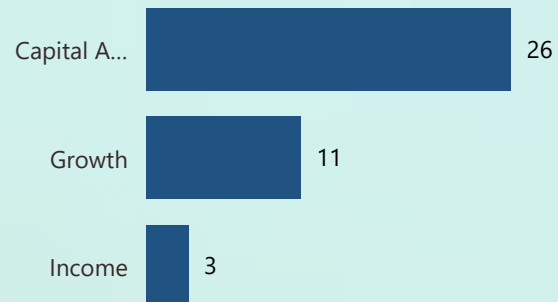
Equity

Fixed  
Deposits

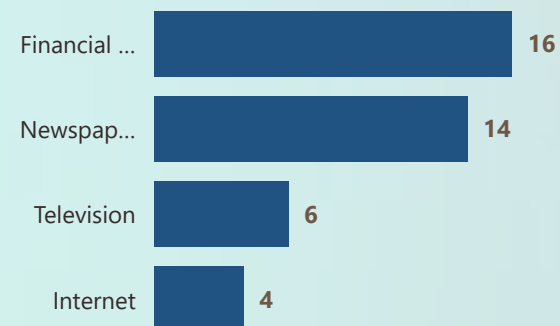
Mutual Fund

Public  
Provident  
Fund

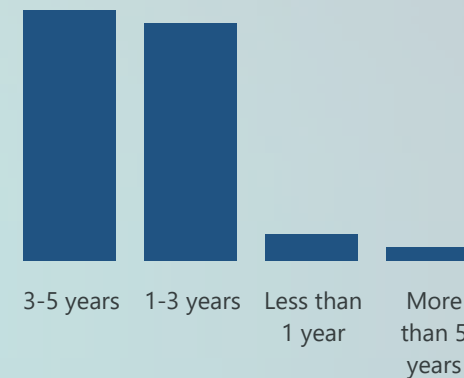
Avenue by Objective



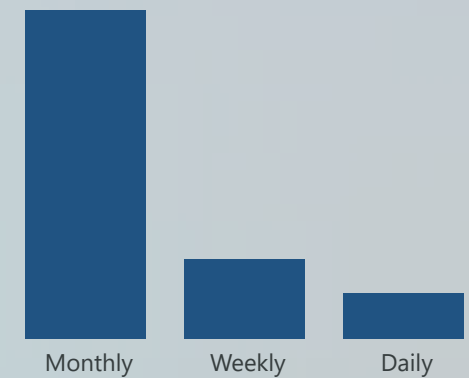
Avenue by Source



Avenue by Duration



Avenue by Invest\_Monitor



## Key Insights :

- Total investment percentage is 92.50.
- Avg Age of investors is 27.8.
- Total no. of male investor is 25 and female investor is 15.
- Maximum investors invest as saving objective as retirement plan 60%, in health 32.5% and in education 7.5%.

\*In case of male and female, sum of investment amount in Government bond is 121 and female 65, in equity market male 89 and female 50, in mutual fund male 61 and female 41.

- Financial consultant and Newspapers as source individual get investment information and most commonly relied upon by investors.
- Maximum average duration for 3-5 years and then 1-3 years.
- Highest investment monitoring Monthly.