Fidelity Investment Dashboard - Project Summary

Project Title:

Fidelity Investment Portfolio Dashboard using Power BI

Project Objective:

The goal of this project is to create an interactive Power BI dashboard that provides financial insights into customer investment portfolios, transaction patterns, and risk tolerance levels. This dashboard helps business users, portfolio managers, and analysts quickly evaluate investment performance, customer distribution, and behavior.

Data Source:

The dataset used is from Fidelity_Sample_Data.xlsx, containing the following sheets:

- Customer_Data: Customer demographics and location
- Portfolio_Data: Portfolio investment information, ROI, asset type, and risk level
- Transactions: Records of financial transactions per customer

Key Steps:

1. Data Import & Modeling

- Loaded 3 sheets from Excel into Power BI
- Created relationships:
- Customer_Data[Customer_ID] to Portfolio_Data[Customer_ID]
- Customer_Data[Customer_ID] to Transactions[Customer_ID]

2. DAX Measures

Created the following calculated measures:

- Total Portfolio Value = SUM(Portfolio_Data[Current_Value])
- Average ROI = AVERAGE(Portfolio_Data[ROI])
- Total Transactions = SUM(Transactions[Amount])
- Transaction Count = COUNTROWS(Transactions)
- Total Customers = DISTINCTCOUNT(Customer_Data[Customer_ID])

3. Dashboard Design

- KPIs (Cards): Displayed total portfolio value, transaction value, ROI, and customer count
- Bar Charts: Portfolio value segmented by asset type and risk level
- Line Chart: Transaction amount trend over time
- Table: Summary of portfolio by customer, including risk and ROI
- Slicers: Enabled filters by location, risk tolerance, and transaction date

4. Styling & Layout
- Used brand colors:
- Primary: #2A735B
- Accent: #80A89A and #EDDB79
- Background: #E7E7E7
- Structured dashboard layout with a professional visual hierarchy

5. Web Embedding Note:
This Power BI dashboard is optimized for web embedding via Power BI Embedded. Authentication is handled securely using Azure Active Directory. To scale for large datasets, techniques like aggregations, query folding, and incremental refresh are recommended.

Key Insights from Dashboard:
- Customers with higher risk tolerance showed better average ROI
- Asset allocation varies significantly across customers
- Transaction volumes peak in certain months indicating behavioral patterns
- Location-based segmentation helps in identifying regional investment trends

Tools & Technologies Used:
- Power BI Desktop
- DAX (Data Analysis Expressions)
- Microsoft Excel

Deliverables:
- .pbix file: Complete interactive dashboard
- .pdf export: Snapshot of dashboard + project note
- GitHub README (optional): Full documentation for sharing or showcasing