

Shield Insurance: Protecting India, One Policy at a Time

Shield Insurance is a leading provider in India. We focus on tailored solutions and prioritize customer needs. Our commitment is to provide security and peace of mind to our customers.



By Monis



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About Company

Shield Insurance.

Shield Insurance Dashboard

Comprehensive Insights for Risk Management and Policy Optimization.

Key Insights

Understand Trends to Improve Policies and Customer Experience.

Our Recommendations

Simple Steps to Improve Coverage and Satisfaction.

Company Overview: Shield Insurance

About Us

- Founded in 2010
- Headquartered in Mumbai, India
- Employs over 500 insurance professionals

Our Mission

To provide reliable and accessible insurance solutions across India.

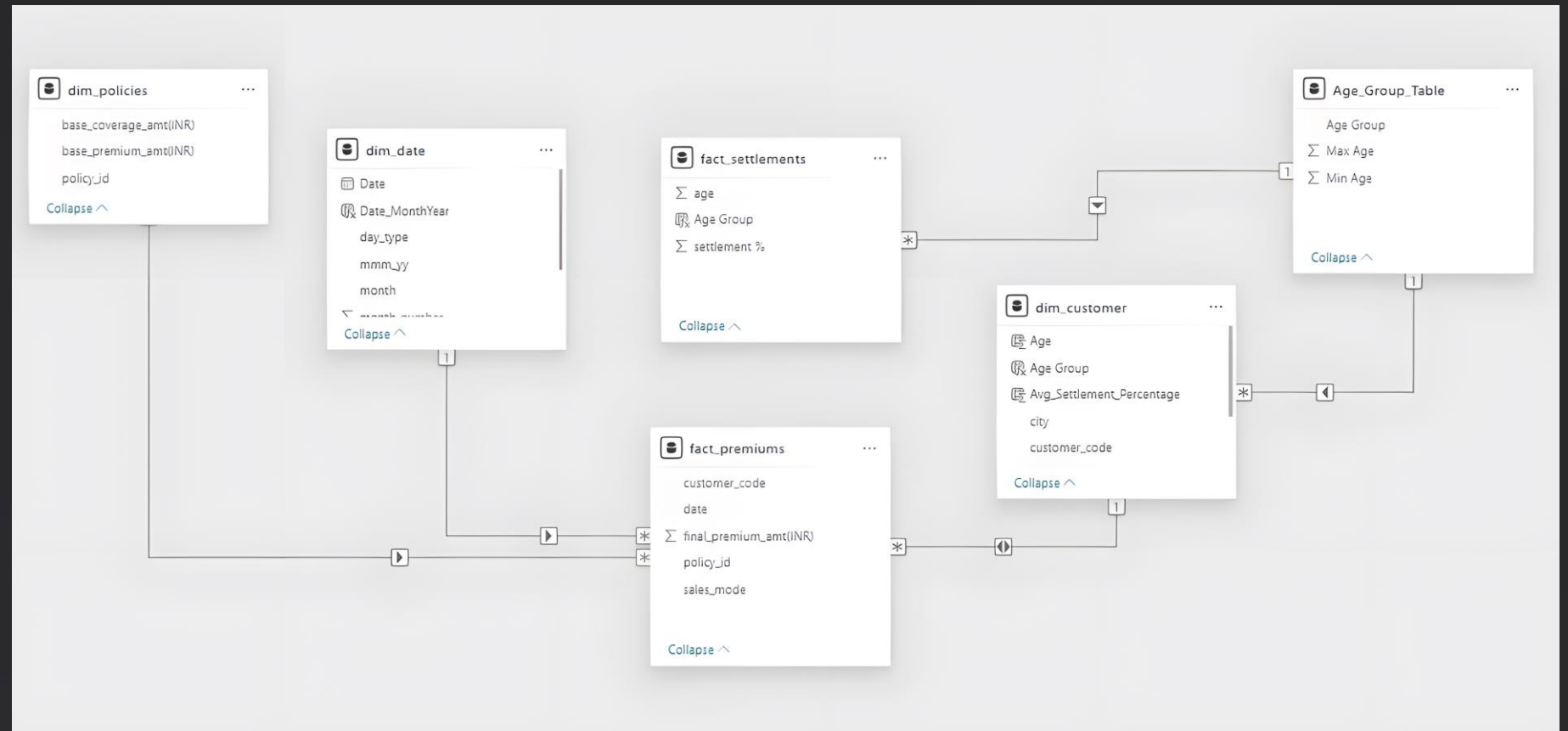
Data Model Overview

Fact Tables

- fact_premiums
- fact_settlements

Dimension Tables

- dim_date
- dim_customer
- dim_policies



Relationships

- The fact_premiums and fact_settlements tables are related to the dim_customer, dim_policies, and dim_date tables.

Select Month

Nov 22 Dec 22 Jan 23
Feb 23 Mar 23 Apr 23

Select Policy ID

POL3309HEL

Select Sales Mode

Offline - Agent
Offline - Direct
Online - App
Online - Website

Abbreviation
LM -> Last Month
DRG -> Daily Revenue Growth
DCG -> Daily Customer Growth

Total Revenue

56M

Average: 309 K

Total Customers

4K

Average: 21

Daily Revenue Growth

309K

Average: 309 K

Daily Customer Growth

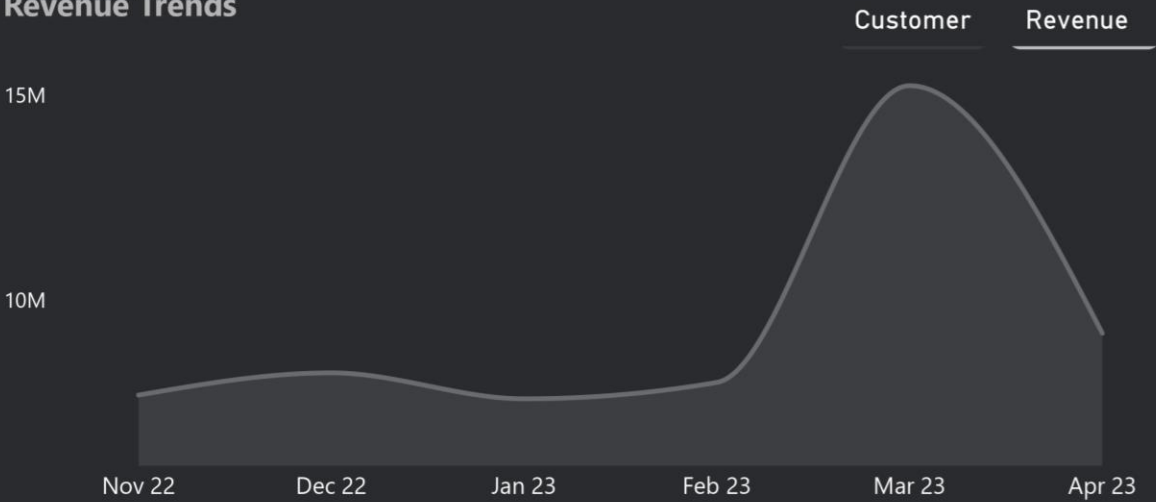
21

Average: 21

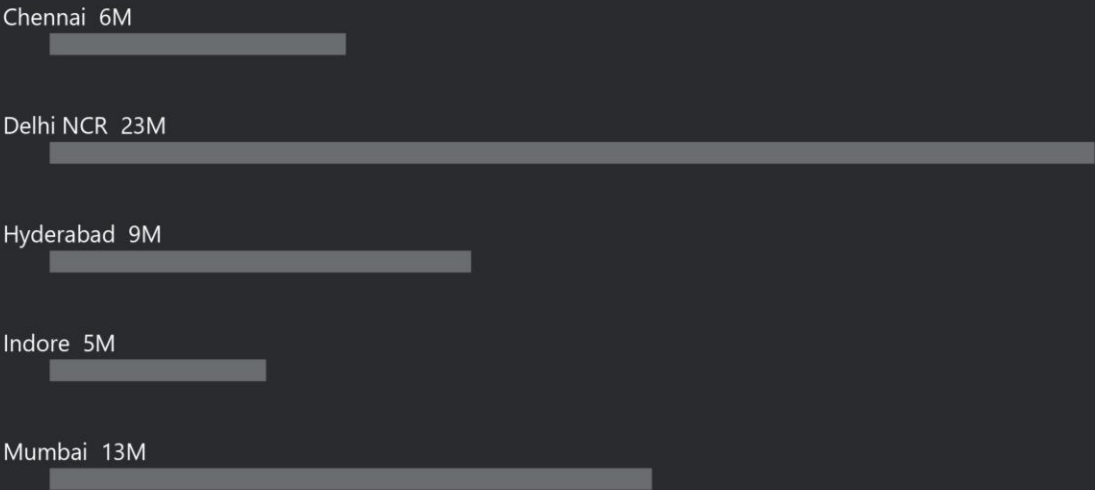
Customer Segmentation

City	Age Group	Total Revenue	Total Customers
Delhi NCR	31-40	11M	736
Mumbai	31-40	6M	419
Delhi NCR	41-50	5M	356
Hyderabad	31-40	4M	296
Chennai	31-40	3M	226
Mumbai	41-50	3M	195
Delhi NCR	25-30	2M	180
Indore	31-40	2M	159
Hyderabad	41-50	2M	144
Delhi NCR	51-65	2M	127
Mumbai	25-30	1M	98
Chennai	41-50	1M	97
Delhi NCR	18-24	1M	91
Mumbai	51-65	1M	85
Hyderabad	25-30	1M	77
Indore	41-50	1M	66
Delhi NCR	65+	1M	60

Revenue Trends



Revenue by City





Sales Analysis View

HOME

GENERAL ANALYSIS

SALES MODE ANALYSIS

CUSTOMER ANALYSIS

Select Month

Nov 22 Dec 22 Jan 23
Feb 23 Mar 23 Apr 23

Select Sales Mode

Offline-Agent
Offline-Direct
Online-App
Online-Website

Abbreviation
LM -> Last Month

Total Revenue

989M

Average: 5 M

Total Customers

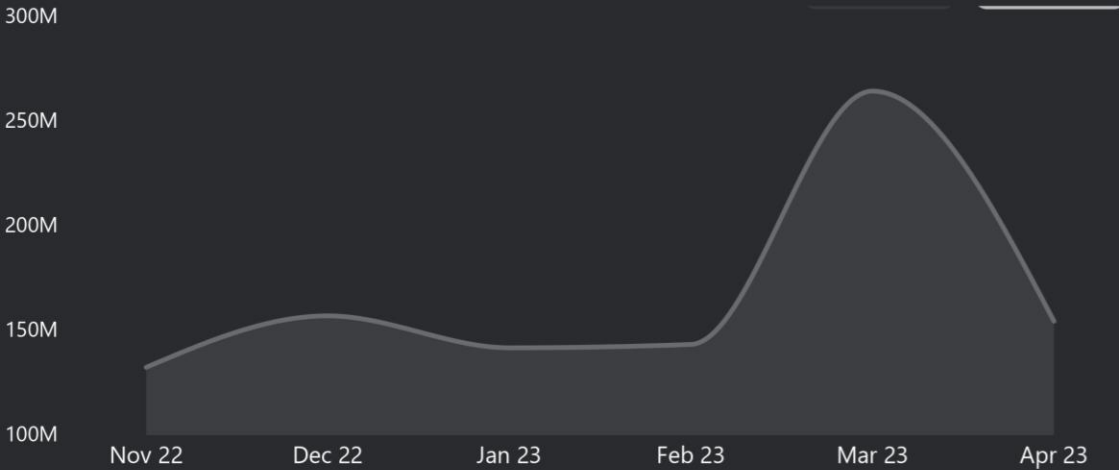
27K

Average: 148

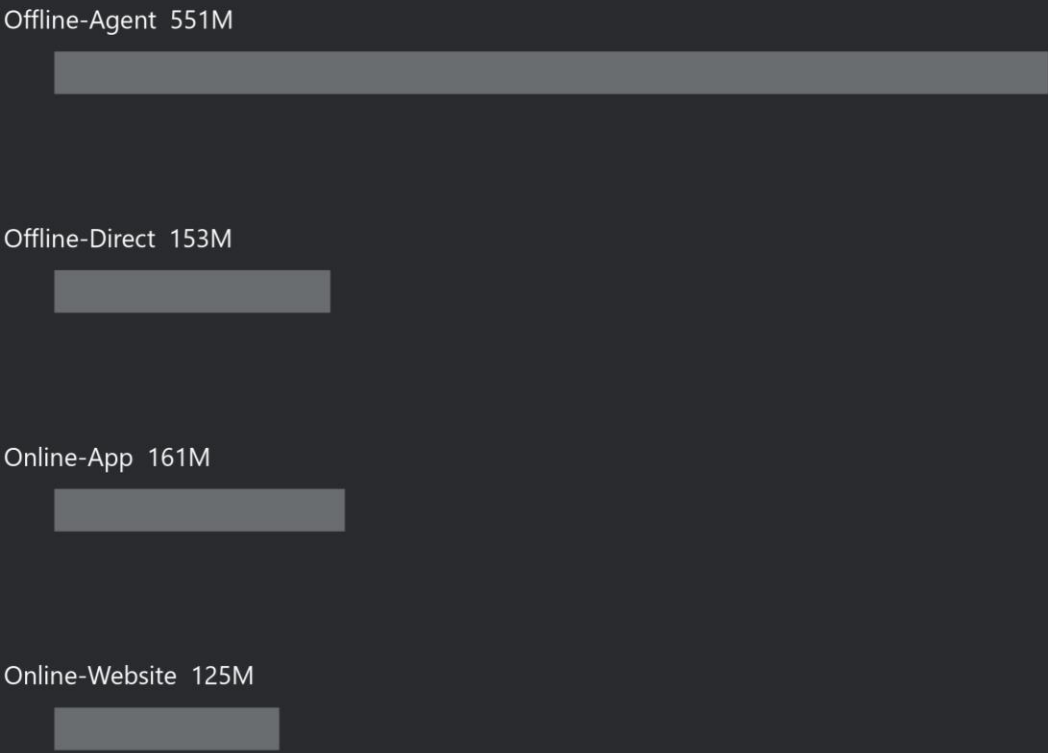
Policy Sales Summary

Policy ID	Sales Mode	Total Revenue	Total Customers
POL4321HEL	Offline-Agent	14M	2478
POL3309HEL	Offline-Agent	30M	2053
POL4331HEL	Offline-Agent	18M	2017
POL5319HEL	Offline-Agent	40M	1905
POL6303HEL	Offline-Agent	46M	1700
POL6093HEL	Offline-Agent	57M	1406
POL9221HEL	Offline-Agent	70M	1266
POL2005HEL	Offline-Agent	182M	1112
POL1048HEL	Offline-Agent	94M	936
POL4321HEL	Offline-Direct	4M	699
POL4321HEL	Online-App	4M	698
POL3309HEL	Online-App	10M	662
POL4331HEL	Offline-Direct	6M	622
POL3309HEL	Offline-Direct	9M	611
POL4331HEL	Online-App	5M	587
POL4321HEL	Online-Website	3M	559
Total		989M	26841

Revenue Trends



Revenue by Sales Mode





Select Month

Nov 22 Dec 22 Jan 23
Feb 23 Mar 23 Apr 23

Select Policy ID

POL3309HEL

Abbreviation
LM -> Last Month

Total Revenue

56M

Average: 309 K

Settlement Amount

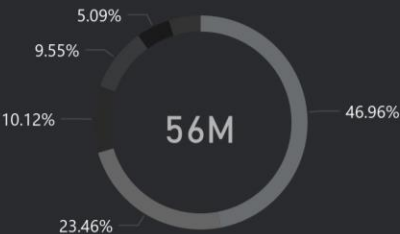
31M

Average: 172 K

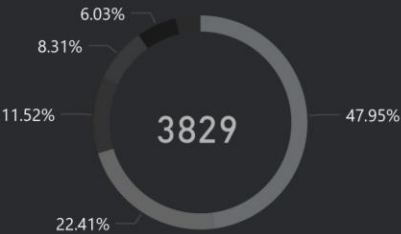
Age Group vs Policy Preference

Policy ID	18-24	25-30	31-40	41-50	51-65	65+
POL1048HEL	30	102	594	366	259	317
POL2005HEL	32	81	499	373	365	618
POL3309HEL	231	441	1836	858	318	145
POL4321HEL	847	1152	1526	561	235	113
POL4331HEL	379	630	1644	692	242	148
POL5319HEL	93	269	1414	949	425	179
POL6093HEL	74	185	966	724	369	225
POL6303HEL	94	224	1202	897	421	179
POL9221HEL	64	110	779	611	443	311

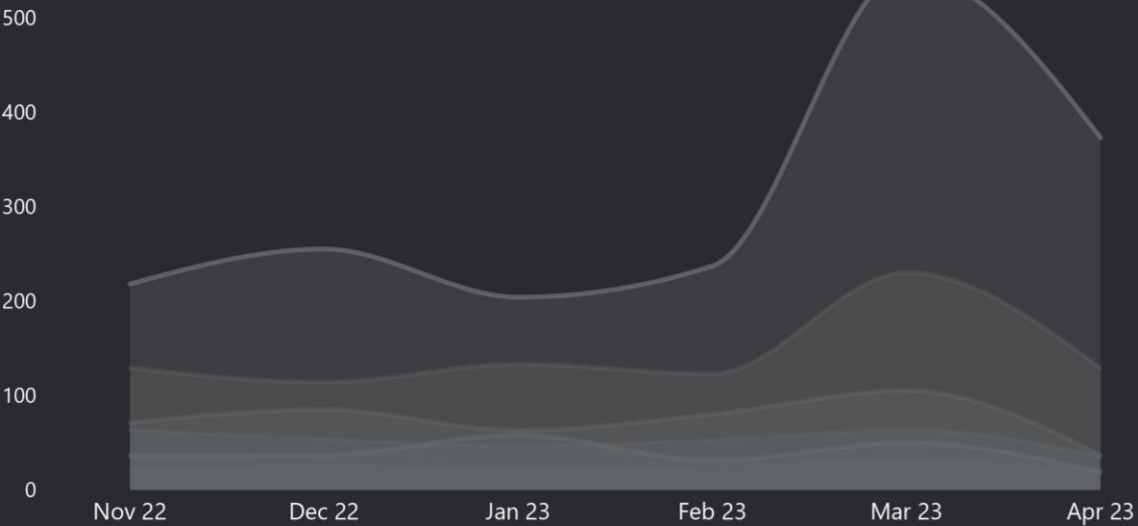
Revenue by Age Group



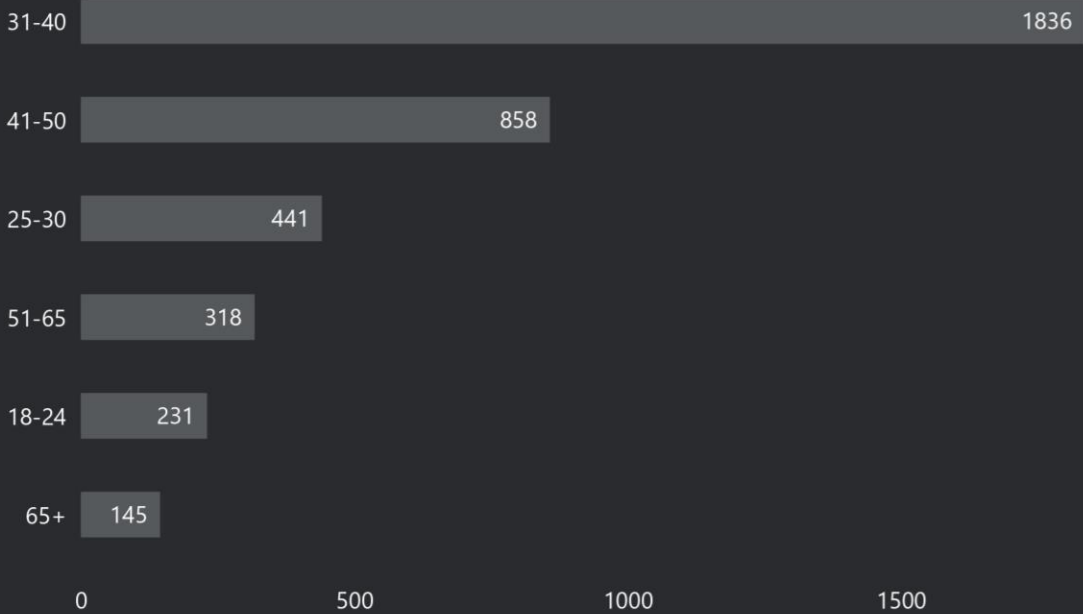
Sales Mode by Age Group



Customer Trend by Age Group



Customers by Age Group



Key Insights

1. Business Performance:

Shield Insurance generated ₹989.25M in revenue from 26,841 customers.

We see a daily revenue growth of ₹5.47M and customer growth of 148.29.

2. Top Cities Driving Revenue:

Delhi NCR, Mumbai, and Hyderabad lead the way, contributing over 80% of total revenue. Delhi NCR is at the forefront with ₹401.57M.

3. Customer Demographics:

The 31-40 age group is our highest revenue contributor at ₹335.72M, followed by the 41-50 and 65+ age groups.

4. Sales Channels:

Offline channels dominate with ₹703.65M in revenue, especially Offline-Agent sales at ₹550.8M. Online sales contribute ₹285.6M.

5. Customer Acquisition Trends:

March 2023 saw the highest customer acquisition, but new customer growth has slowed in the following months, indicating seasonal fluctuations.



Recommendations

1

Enhance Digital Sales Strategies:

Improve the mobile app experience and offer exclusive online discounts to boost online sales (currently ₹285.6M).

2

Target High-Value Age Groups:

- Focus on the 31-40 & 41-50 age groups, which contribute 55% of revenue.
- Tailor insurance plans for the growing 65+ segment (₹193.77M revenue).

3

Expand in High-Growth Cities:

Increase marketing efforts in Delhi NCR, Mumbai, and Hyderabad, contributing over 80% of revenue.

Thank You!

We Appreciate Your Time and Consideration.