

Stakeholder Insights and Performance Dashboard

Purpose:

The dashboard will provide a comprehensive view of key business metrics and data insights related to stakeholders, insurers, and policy performance. It will enable stakeholders to analyse premium trends, profitability, and asset distribution to make data-driven decisions.

Requirements:

1. Charts and Visualizations:

- Compare the total value created by different insurers.
- Display trends in premiums collected over time.
- Showcase the distribution of shareholding patterns among stakeholders.
- Analyse the relationship between cost ratio and profitability.
- Visualize profitability for different cities and policy tenure durations.
- Represent the distribution of assets under management across stakeholders.

2. Key Performance Indicators (KPIs):

- Display the total premium collected
- Show the average age of stakeholders
- Highlight the total Value Created for insurers or stakeholders where Assets under Management is 'Equity,'
- Identify the highest value created by a single insurer.

3. Filters:

- Filter data by city to focus on specific regions.
- Filter data by stakeholders to analyse their contributions.
- Provide a range slider to filter policies based on tenure.
- Allow filtering of data within a specific date range.
- Enable filtering by gender for demographic insights.

4. Interactivity:

- Enable charts to dynamically filter other visuals when clicked.

- Provide tooltips on hover to display detailed information.
- Ensure filters and KPIs update dynamically based on selections.

5. **Export Options:**

- **PDF Export Button:** Provide a dedicated button for stakeholders to download the dashboard in PDF format.
- Ensure the PDF captures all visible charts, KPIs, and filters.
- Include a light watermark with the company's branding on the exported PDF.

6. **User Access:**

- Ensure role-based access for stakeholders with different data visibility levels.