



## Power BI Internship Program

### Investment Analysis Report



### Task List

#### Task-1

Understand and summarize key statistics in the dataset.

#### Task-2

Analyze and visualize gender based differences in investment preferences.

#### Task-3

Analyze the relationship between savings objectives and investment choices.

#### Task-4

Analyze investment durations and monitoring frequencies.

#### Task-5

Analyze and visualize the reasons for investment.

#### Task-6

Analyze the sources from which individuals gather investment information.

#### Task-7

Create a comprehensive dashboard incorporating all insights.

# Task 1: Data Exploration and Summary

Average Age

28

Investment Avenues

40

Stock Market

40

Female

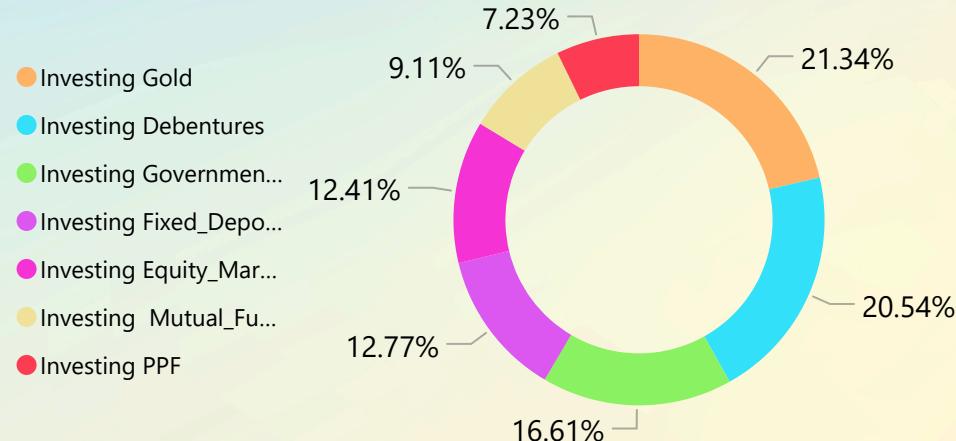
Male

Assured Returns

Safe Investment

Tax Incentives

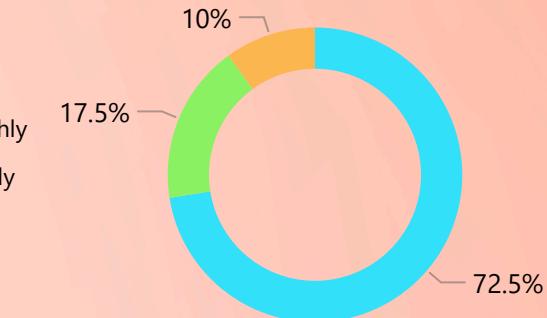
Percentage of Individuals with various Investment



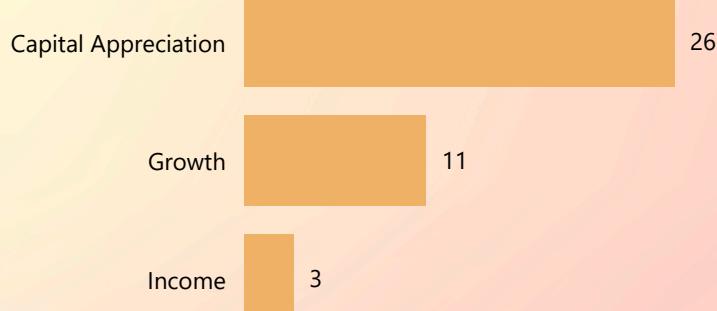
Investment By Gender



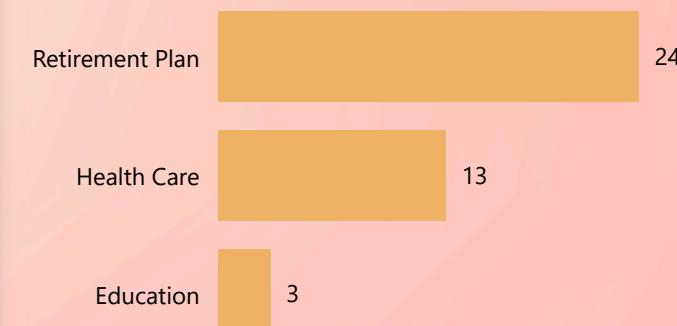
Investment Monitoring Frequency



Common Savings Objective



Savings Objective by Individuals



# Task 2: Gender Based Analysis

Average Age  
28

Investment Avenues  
40

Stock Market  
40

Female

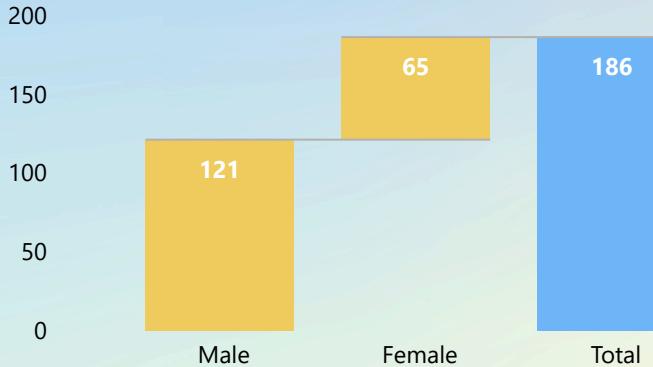
Male

Assured Returns

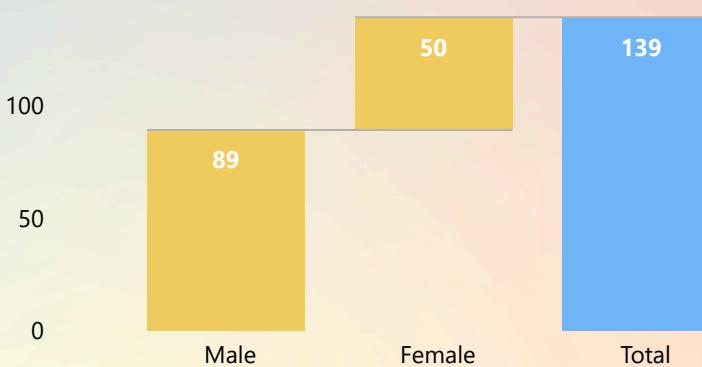
Safe Investment

Tax Incentives

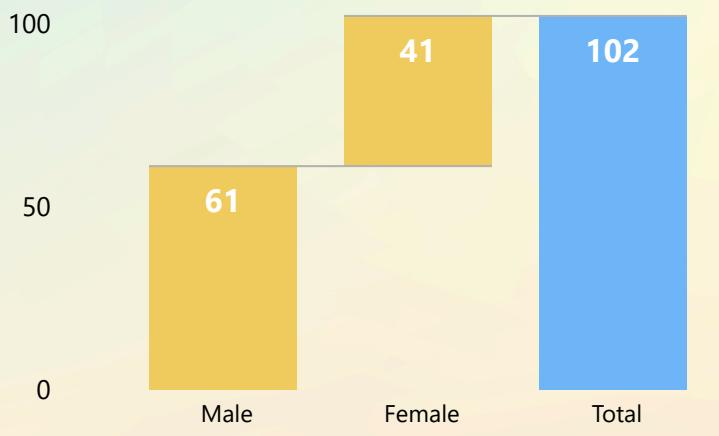
Investment Choices By Government Bonds



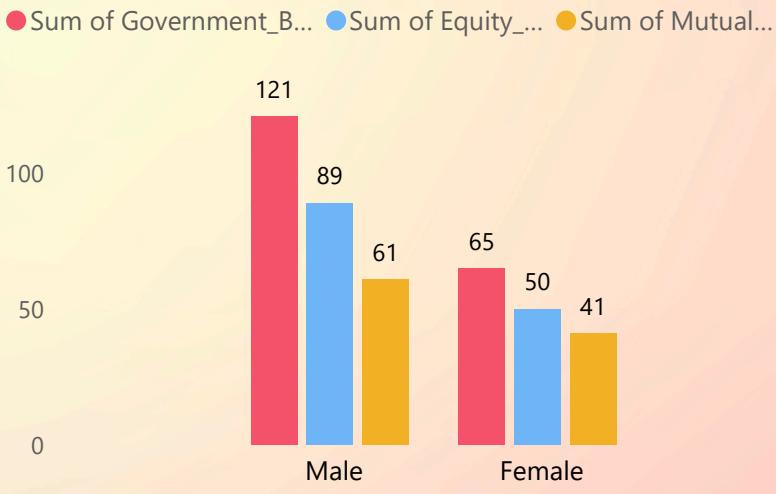
Investment Choices By Equity Market



Investment Choices By Mutual Funds



Each Investment Category By Male & Female



## Key Insights

### 1. Investment Preferences:

- Males prefer government bonds (121) over equity (89) and mutual funds (61).
- Females show a more balanced approach across investment types.

### 2. Gender Differences:

- Females invest more in equity markets (50) compared to males (89).
- Males invest significantly more in government bonds (121) than females (65).

### 3. Overall Investment Distribution:

- Government bonds are the most popular investment choice (186 total), followed by equity markets (139), and mutual funds (102).

### 4. Risk Appetite:

- Males appear to have a lower risk appetite, favoring government bonds.
- Females show a higher risk tolerance with more balanced investments across categories.

# Task 3: Objective Analysis

Savings Objectives  
3

Investment Avenues  
40

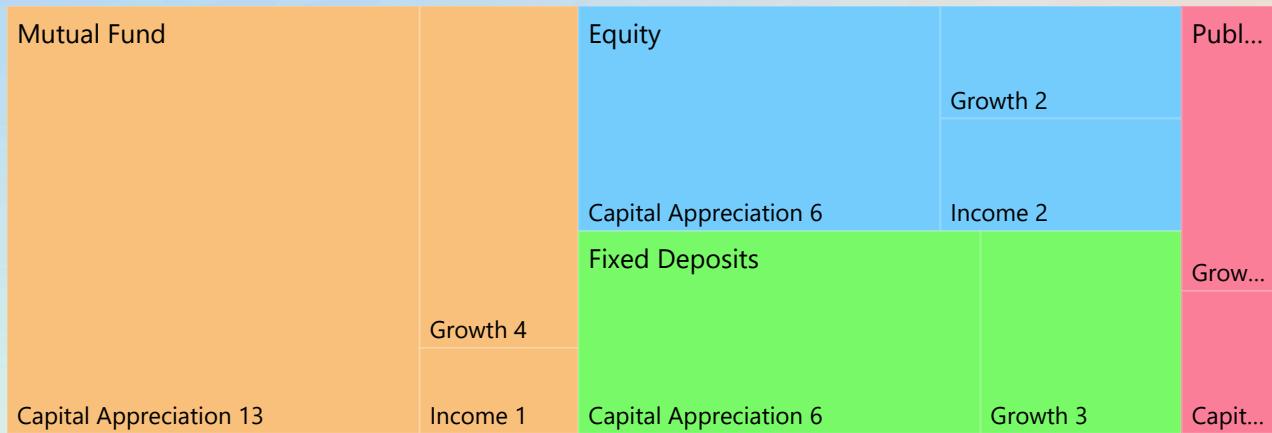
Stock Market  
40

Assured Returns

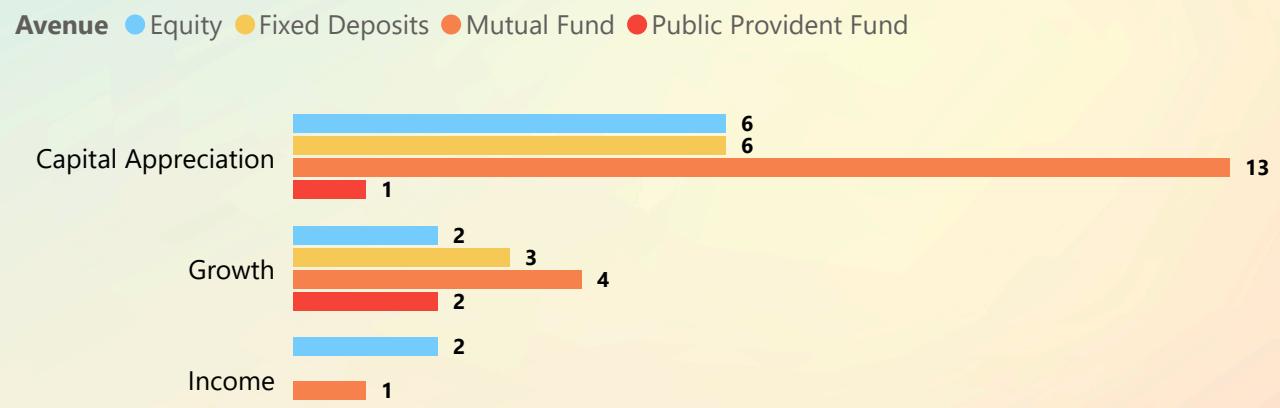
Safe Investment

Tax Incentives

Investment Avenues By Savings Objective



Avenue by Objective Savings



Key Insights

## 1. Investment Avenue Distribution:

- Mutual Funds and Equity seem to be the most popular investment avenues, with Fixed Deposits and Public Provident Fund used less frequently.

## 2. Objective-Avenue Alignment:

- Capital Appreciation is strongly associated with Mutual Funds and Equity investments.
- Growth objectives are pursued through a mix of all investment types, with a slight preference for Mutual Funds.
- Income objectives are primarily met through Equity and Fixed Deposits.

## 3. Risk-Return Trade-off:

- The higher allocation to Mutual Funds and Equity for Capital Appreciation suggests a willingness to accept higher risk for potentially higher returns.
- The use of Fixed Deposits and Public Provident Fund for Income and Growth objectives indicates a preference for more stable, lower-risk options for these goals.

## 4. Objective Priorities:

- Capital Appreciation seems to be the primary focus, followed by Growth and then Income, based on the number of investments allocated to each.

# Task 4: Investment Duration and Frequency

Equity  
10

Public Provident  
3

Fixed Deposits  
9

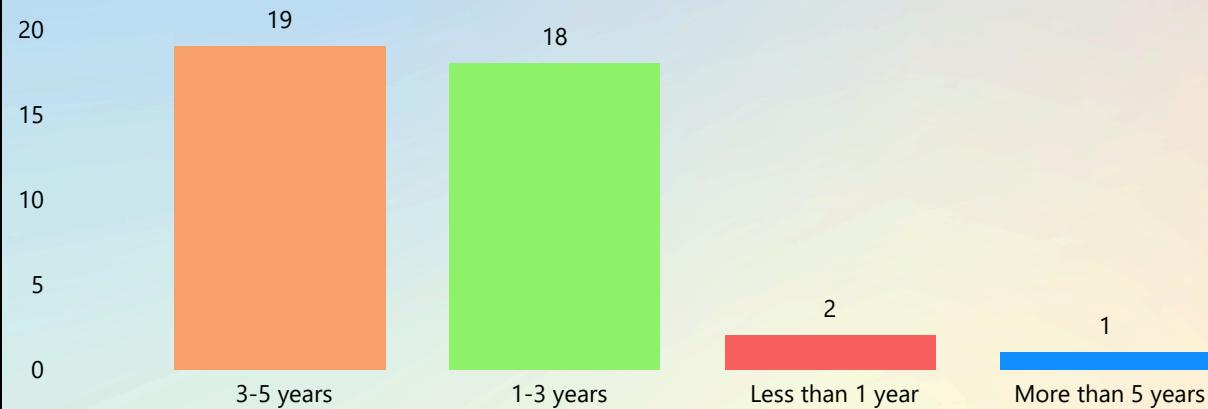
Mutual  
18

Assured Returns

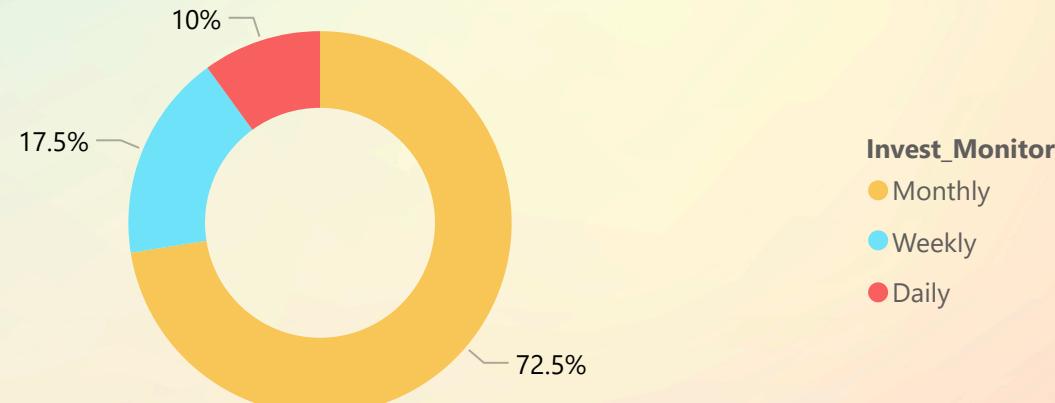
Safe Investment

Tax Incentives

Duration by Avenue



Avenue by Invest Monitor



Key Insights

**1. Investment Types:**

- Mutual funds are the most popular investment, with 18 participants.
- Equity and Fixed Deposits follow with 10 and 9 participants respectively.
- Public Provident is the least popular, with only 3 participants.

**2. Investment Duration:**

- Most investments are medium to long-term.
- 19 investors prefer 3-5 years duration.
- 18 investors opt for 1-3 years duration.
- Very few choose short-term (less than 1 year) or very long-term (more than 5 years) investments.

**3. Investment Monitoring Frequency:**

- The majority (72.5%) monitor their investments monthly.
- 17.5% check weekly.
- Only 10% monitor daily.

**4. Risk and Time Horizon:**

- The preference for mutual funds and medium-term investments suggests a balanced approach to risk.
- Few investors opt for very short or very long durations, indicating a preference for moderate time horizons.

**5. Engagement Level:**

- The monthly monitoring preference suggests most investors are not overly active in managing their investments.

# Task 5: Reasons For Investment

Assured Retu...

Safe Investm...

Tax Incentives

Better Returns

Fund Diversifica...

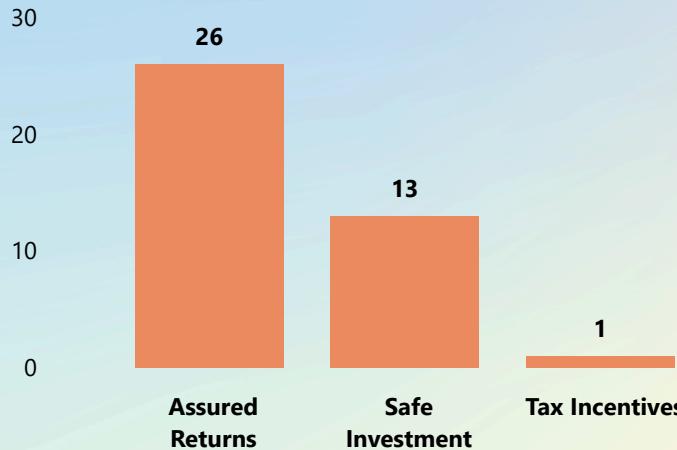
Tax Benefits

Capital Appreci...

Dividend

Liquidity

Bonds Investment Type by Reasons



Mutual Investment Type by Reasons



Key Insights

1. Bonds:

- Assured Returns is the primary reason (26)
- Safe Investment is the second most important factor (13)
- Tax Incentives play a minor role (1)

2. Mutual Funds:

- Better Returns is the main driver (24)
- Fund Diversification is a significant factor (13)
- Tax Benefits have some influence (3)

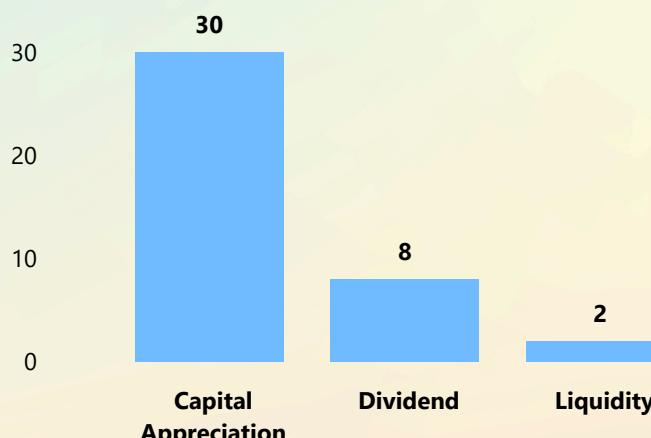
3. Equity:

- Capital Appreciation is the dominant reason (30)
- Dividend income is a secondary factor (8)
- Liquidity is a minor consideration (2)

4. Fixed Deposits (FD):

- Risk-Free nature is the primary attraction (19)
- Fixed Returns are nearly as important (18)
- High Interest Rates have some appeal (3)

Equity Investment Type by Reasons

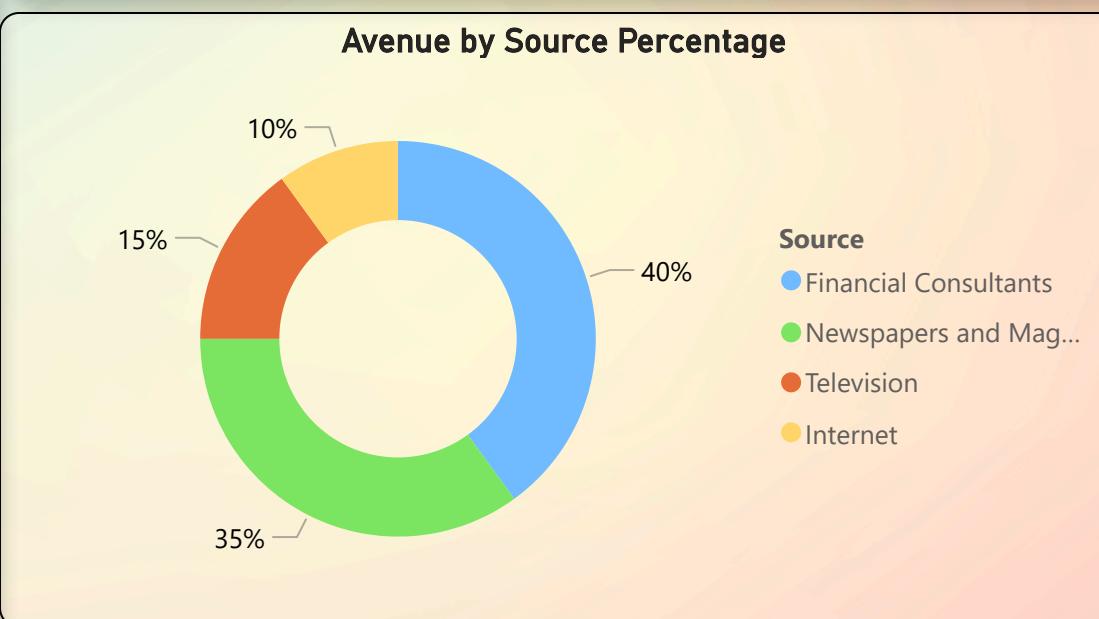
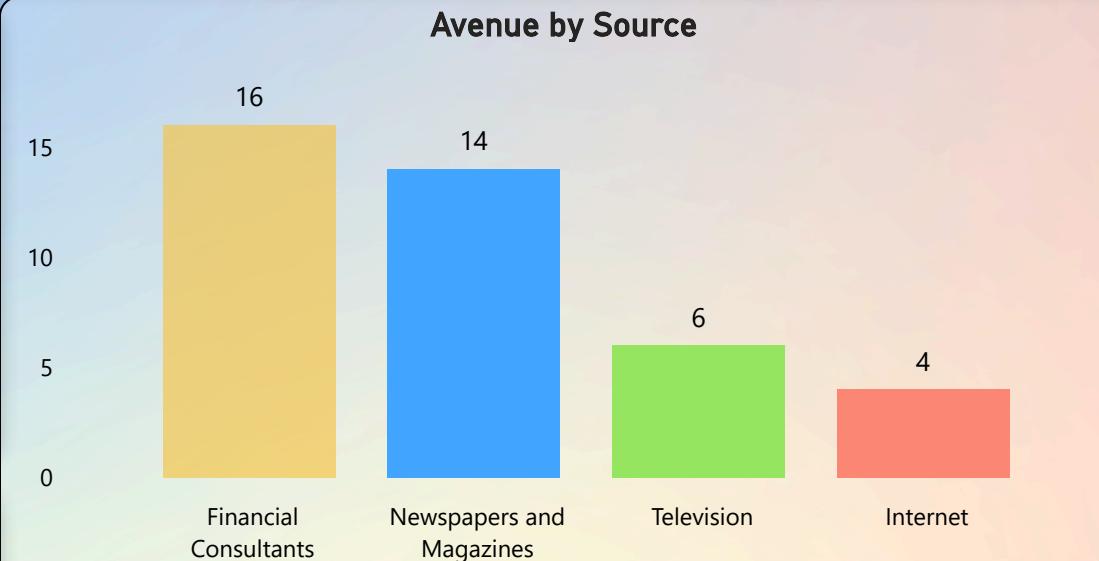


FD Investment Type by Reasons



# Task 6: Source of Information

16	Financial Consultants
14	Newspapers & Magazines
6	Television
4	Internet



## Key Insights

- Revenue Sources:** The report shows four main sources of revenue: Financial Consultants, Newspapers and Magazines, Television, and Internet.
- Highest Revenue Source:** Financial Consultants generate the most revenue, contributing 16 units (could be in millions or thousands, depending on the scale) and accounting for 40% of total revenue.
- Second Highest:** Newspapers and Magazines are the second-largest source, bringing in 14 units and making up 35% of total revenue.
- Traditional Media:** Television still plays a significant role, contributing 6 units and 15% of total revenue.
- Digital Presence:** The Internet, while the smallest source, still accounts for 4 units and 10% of total revenue, indicating a digital presence.
- Diverse Revenue Streams:** The organization has a mix of traditional and modern revenue sources, suggesting a diversified approach to income generation.
- Consultant-Driven:** The heavy reliance on Financial Consultants (40%) suggests this may be a financial services firm or a business with a strong consulting component.
- Media Influence:** Combined, Newspapers, Magazines, and Television account for 50% of revenue, indicating a strong



# Investment Insights Dashboard

Average Age

28

Investment Avenues

40

Stock Market

40

Savings Objectives

3

1-3 years

3-5 years

Less than 1 year

More than 5 years

Female

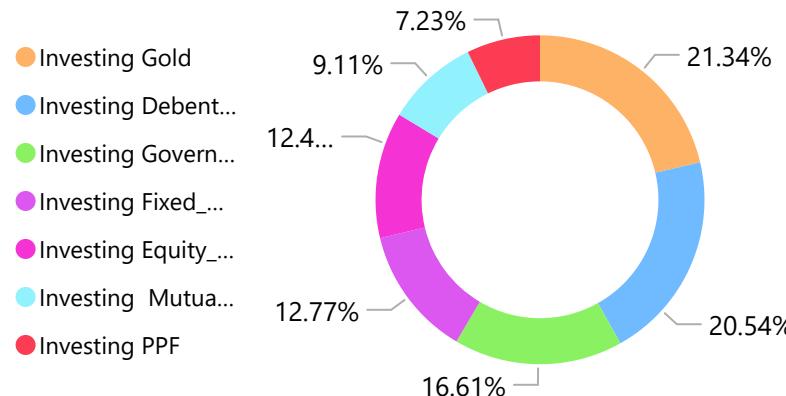
Male

Daily

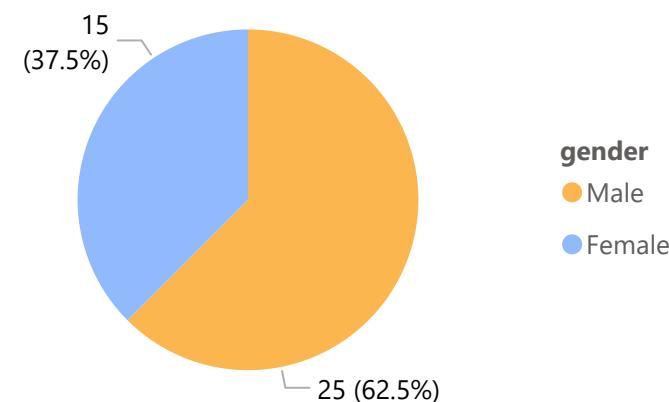
Monthly

Weekly

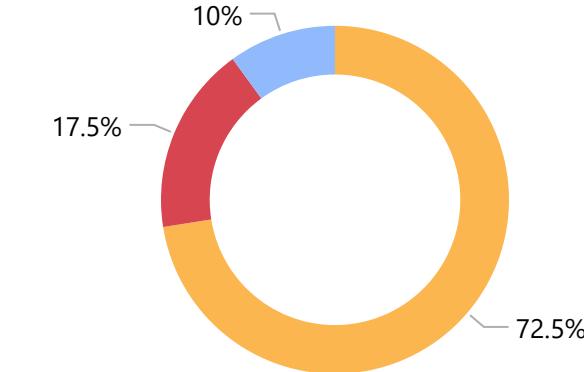
## Percentage of Individuals with various Investment



## Gender Distribution



## Investment Monitoring Frequency



## Common Savings Objective

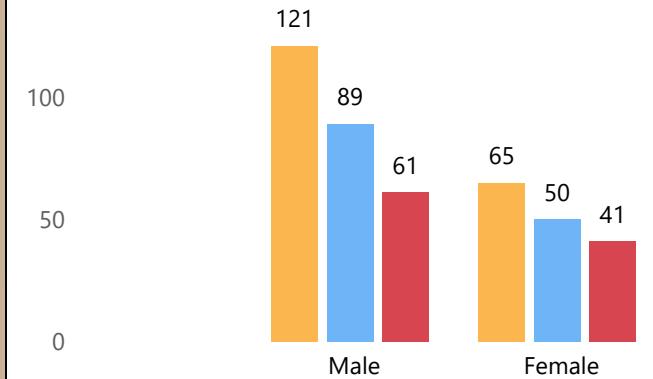


## Savings Objective by Individuals



## Each Investment Category By Male & Female

Sum of Government\_Bonds   Sum of Equity\_Mar...   Sum of Mutual\_Funds





# Investment Insights Dashboard

**Equity**  
10

**Public Provident**  
3

**Fixed Deposits**  
9

**Mutual**  
18

Female

Male

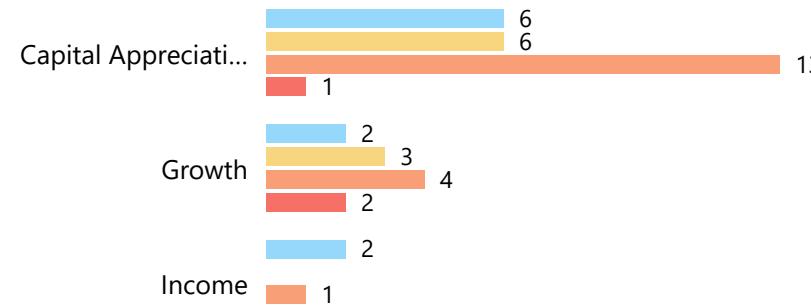
Daily

Monthly

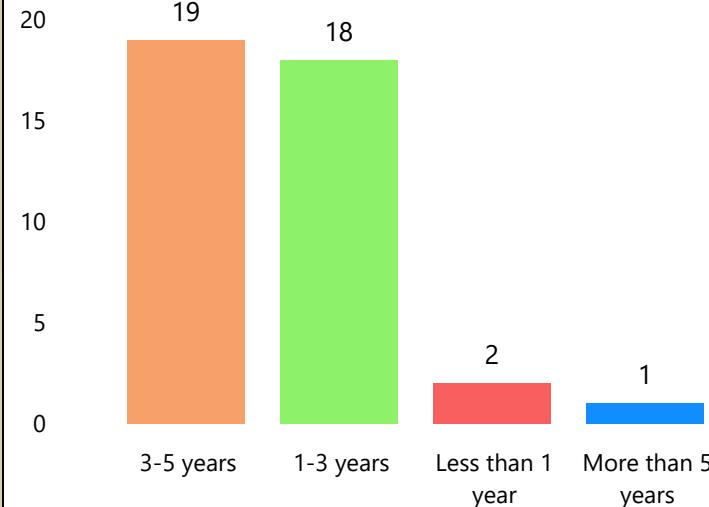
Weekly

## Avenue by Objective Savings

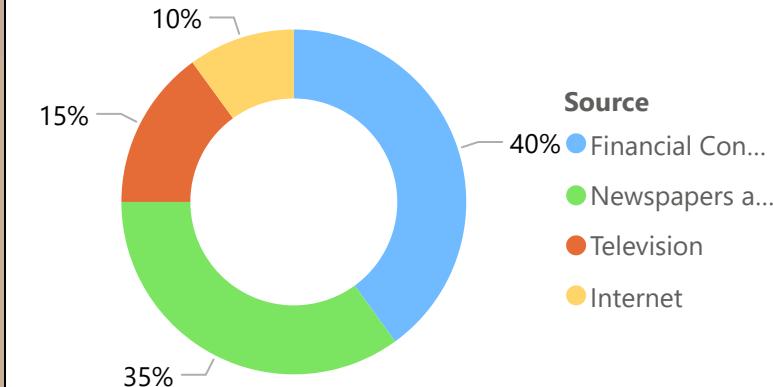
Avenue ● Equity ● Fixed Deposits ● Mutual Fund ● Public Providen...



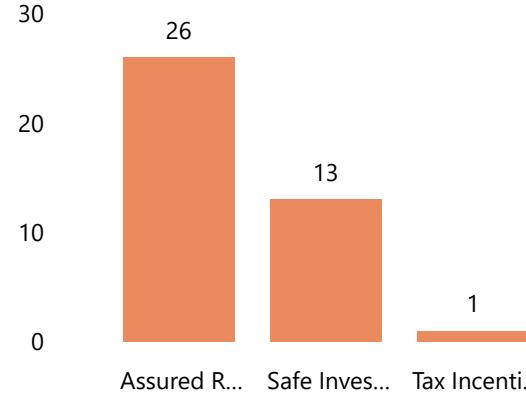
## Avenue by Duration



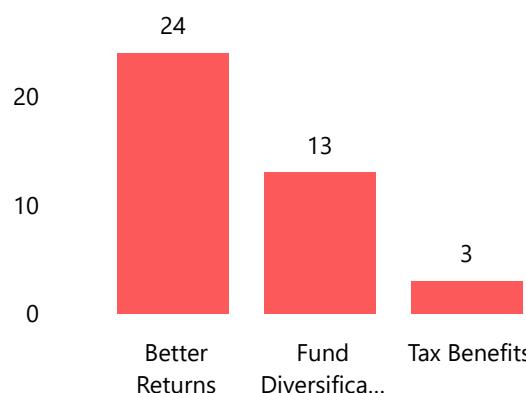
## Avenue by Source



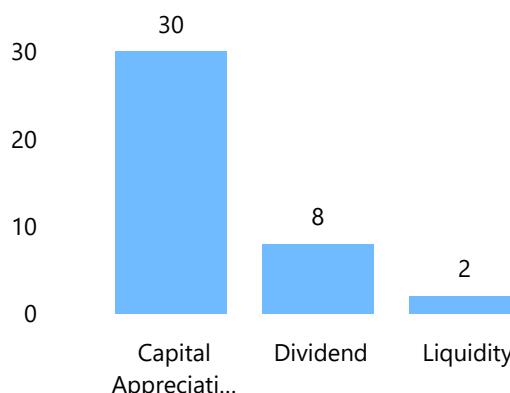
## Bonds Investment Type by Reasons



## Mutual Investment Type by Reasons



## Equity Investment Type by Reasons



## FD Investment Type by Reasons

