



# **INTERNSHIP PROGRAM**

Power BI



# Task 1



## Task : Data Exploration and Summary

**Objective:** Understand and summarize key statistics in the dataset.

### Steps:

1. **Data Import:** Import the dataset into Power BI.
2. **Exploratory Analysis:** Explore the dataset structure and data types.
3. **Calculate Statistics:** Compute average age, percentage of individuals with various investments, and common savings objectives.
4. **Visualization:** Create charts for effective visualization of the summary statistics.

# Task 1 : Data Exploration and Summary

Average age

27.80

Investment Avenues

37

No Investment Avenues

3

Gender

Female

Male

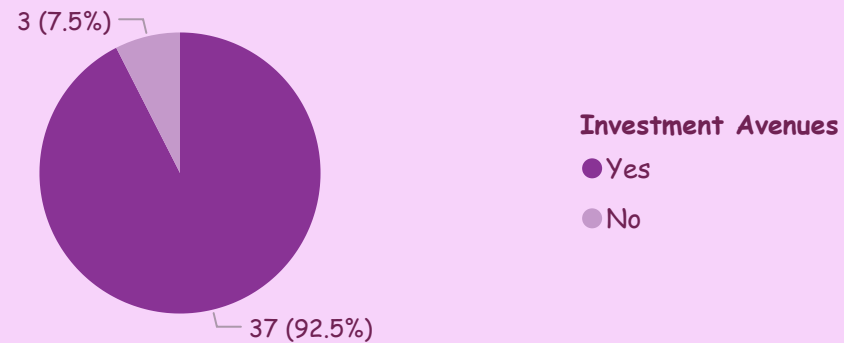
Saving Objectives

Education

Health Care

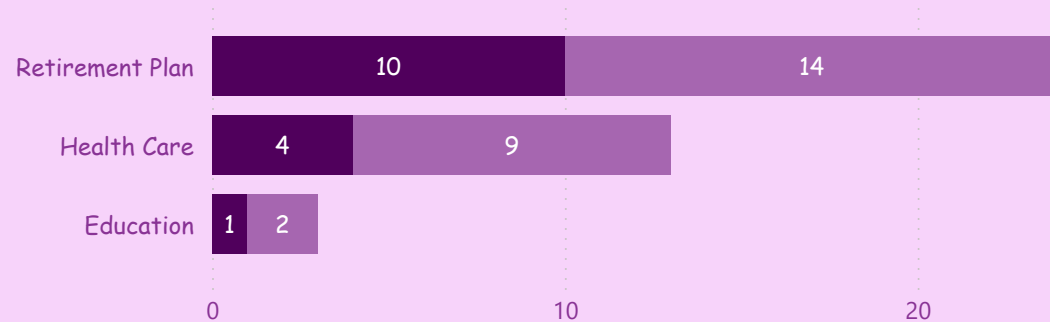
Retirement Plan

Gender by Investment Avenues

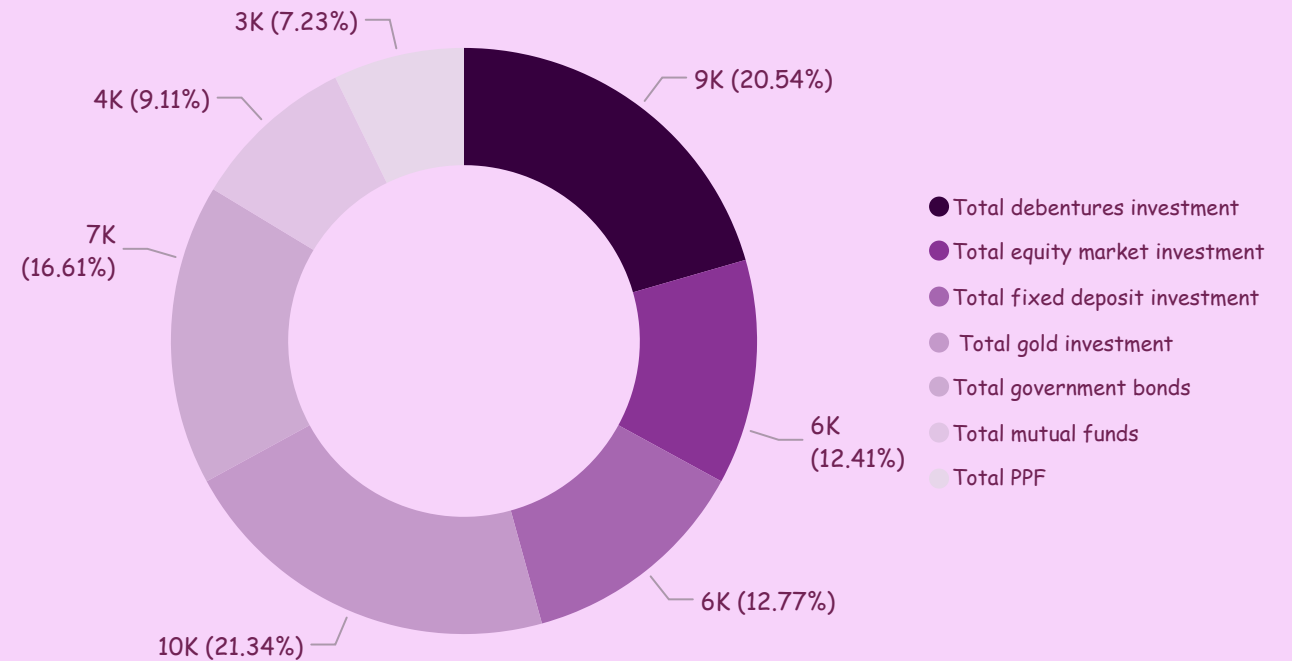


Gender by Savings objectives

Gender ● Female ● Male



Different Investment Avenues



## Conclusion

In this project, I concentrated on **Data Exploration and Summary** by importing a dataset, performing an exploratory analysis, and calculating essential statistics such as the average age, investment proportions, and common savings objectives. The process culminated in a set of insightful visualizations. 🎯 📊

### Key Insights & Findings:

- **Popular Savings Goals:** Retirement planning, healthcare, and education are the most common objectives, with retirement leading the way as the primary goal for most individuals.
- **Average Age:** The mean age across the dataset is approximately 28.8 years.
- **Investment Trends:** Investments are heavily concentrated in Gold and Debentures.

# Task 2



## Task : Gender-based Analysis

**Objective:** Analyze and visualize gender-based differences in investment preferences.

### Steps:

1. **Visual Comparison:** Create charts comparing investment choices (equity, mutual funds, government bonds) based on gender.
2. **Insights:** Derive insights from the visualizations, noting significant gender-based trends.

# Task 2: Gender Based Analysis

Average age

27.80

Female

15

Male

25

Gender

Female

Male

Avenue

Equity

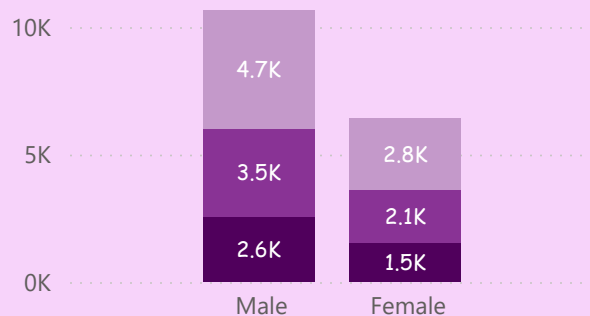
Fixed  
Deposits

Mutual  
Fund

Public  
Provident ...

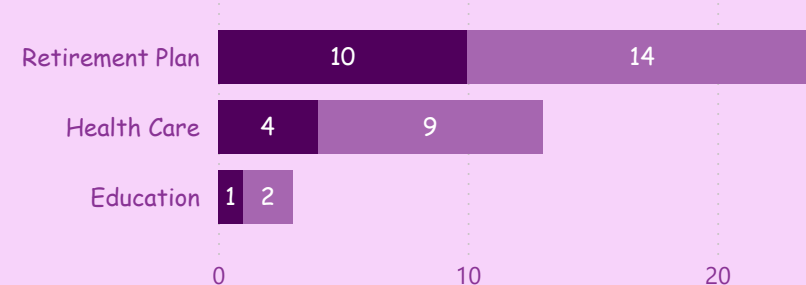
## Gender by Investment Avenues

● Total mutual ... ● Total equity ... ● Total gove...



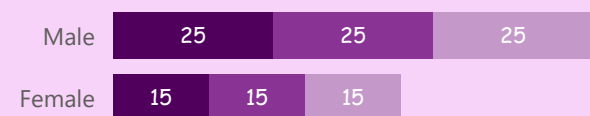
## Gender by Savings objectives

● Female ● Male



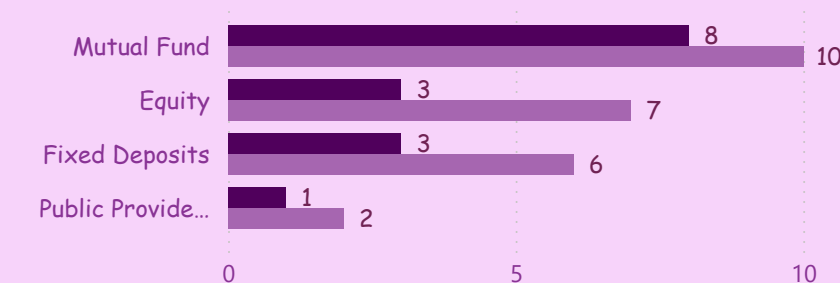
## Gender by Count of Investment Avenues

● Total mutual f... ● Total equity ... ● Total gover...

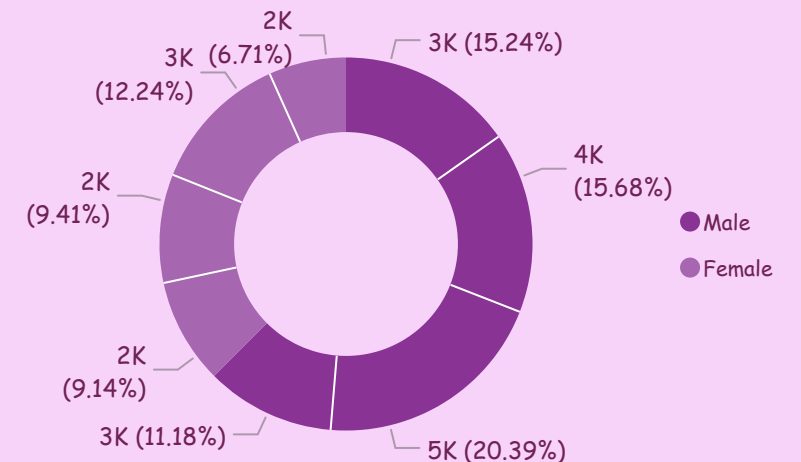


## Gender by Savings objectives

● Female ● Male



## Different Investment Avenues



# Conclusion

This task focused on a **Gender-Based Analysis of Investment Preferences**, where I explored significant trends in investment choices like equity, mutual funds, and government bonds, differentiated by gender. Using dynamic visualizations and in-depth analysis, I uncovered key insights into gender-specific investment behavior. 🎯 📊

## Key Insights & Findings:

- . **Male Dominance:** The dataset reveals a higher number of male investors.
- . **Average Age Parity:** Both male and female investors have an average age of around 28.8 years.
- . **Investment Distribution:** Male investors tend to have larger investments in government bonds, equity markets, and mutual funds compared to females.
- . **Retirement Planning:** This is a shared primary objective for both genders, with 14 males and 10 females aiming for it.
- . **Mutual Funds & Equity:** Males show a stronger preference for mutual funds (10 males vs. 8 females) and equity investments (7 males vs. 3 females).



# Task 3



## Task : Objective Analysis

**Objective:** Analyze the relationship between savings objectives and investment choices.

### Steps:

1. **Correlation Analysis:** Explore the correlation between savings objectives (e.g., Capital Appreciation) and investment avenues (e.g., Equity).
2. **Chart Creation:** Generate charts displaying preferred investment choices for each savings objective.



# Task 3: Objective Analysis

## Duration

1-3 years

3-5 years

Less than 1 year

More than 5 years

## Avenue

Equity

Fixed  
Deposits

Mutual  
Fund

Public  
Providen...

## Gender

Female

Male

Gold  
239

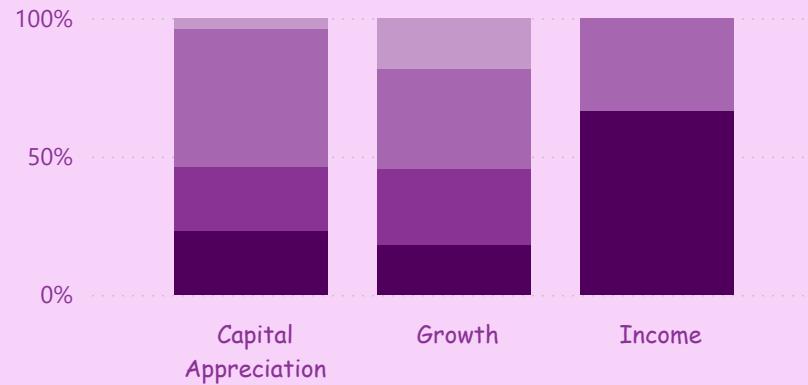
PPF  
81

Mutual Funds  
102

Government  
bonds  
186

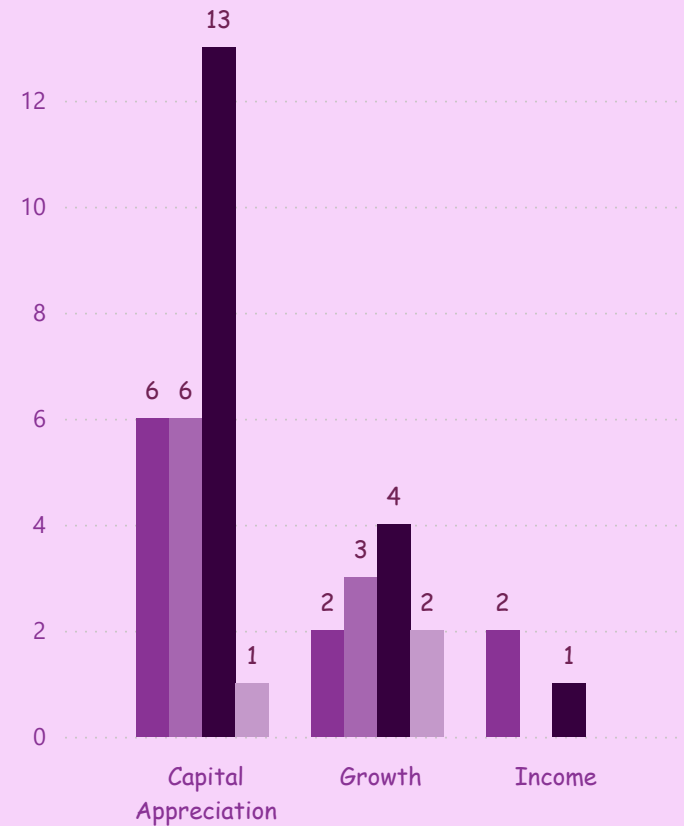
## Equity Market by objective and Avenue

● Equity ● Fixed Deposits ● Mutual Fund ● Public Provident Fund



## Sum of various Investment

● Equity ● Fixed Deposits ● Mutual Fund ● Public Provident Fu...



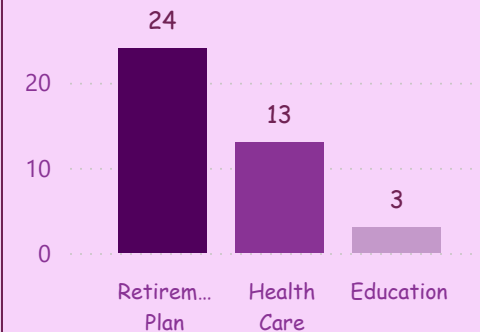
## Saving Objectives

All

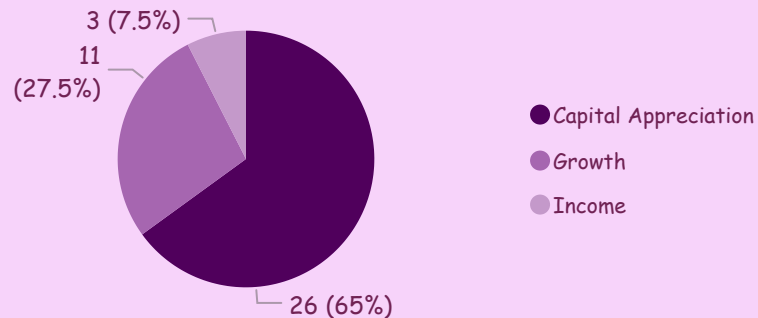
## Objectives

All

## Gender by Savings objectives



## Avenue by Objective



## Conclusion

This project focused on analyzing and visualizing the relationship between **savings objectives and investment choices**, utilizing interactive dashboards to uncover critical insights. The experience allowed me to hone my skills while exploring new techniques in a dynamic setting.

### Key Insights & Findings:

- .**Investment Avenues:** A total of 4 distinct investment avenues were analyzed.
- .**Investor Count:** There are approximately 40 investors making varied investment choices.
- .**Capital Appreciation:** This objective has the highest count of investment avenues, spanning mutual funds, equity markets, fixed deposits, and PPF.
- .**Objective Trends:** Investments are primarily directed toward retirement planning and healthcare, while education sees comparatively less investment focus.

# Task 4



## Task: : Investment Duration and Frequency

**Objective:** Analyze investment durations and monitoring frequencies.

### Steps:

1. **Duration Distribution:** Visualize the distribution of investment durations.
2. **Frequency Analysis:** Examine investment monitoring frequencies and their impact on investment preferences.

# Task 4: Investment Duration and Frequency

Saving Objectives

1-3 years

3-5 years

Less than 1 year

More than 5 years

Gender

Female

Male

Saving Objectives

All

Objectives

All

Equity

40

Fixed Deposit

7

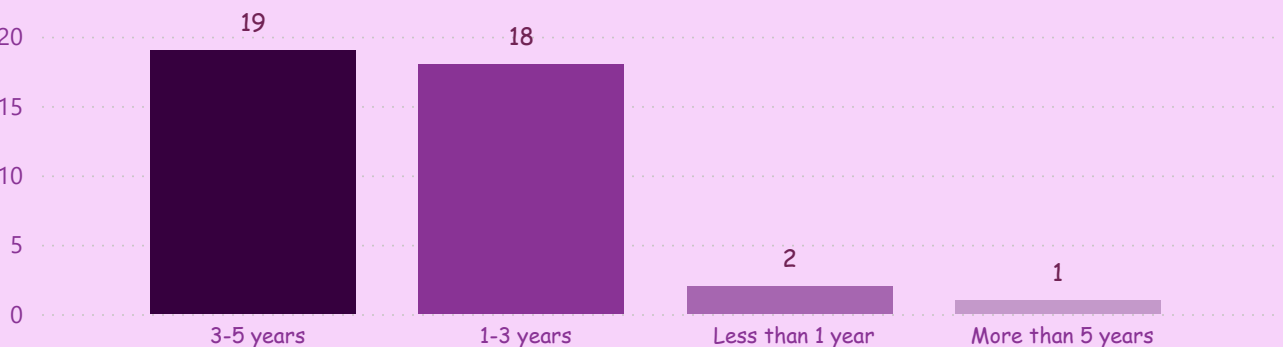
Mutual Funds

40

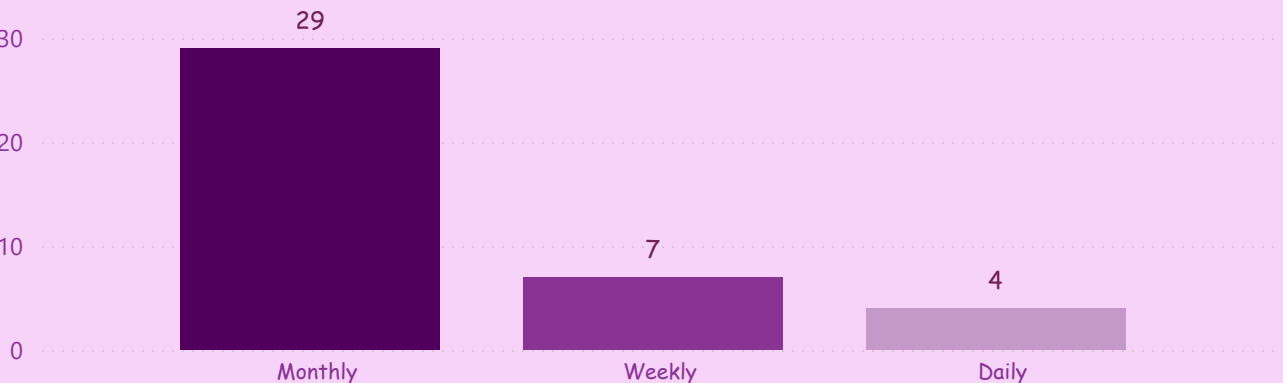
PPF

6

Avenue by Duration



Avenue by Invest Monitor



Avenue

Equity	Mutual Fund
Fixed Deposits	Public Provident Fund

## Conclusion

In this phase, I focused on **Investment Duration and Monitoring Frequency Analysis**, creating visualizations that reveal key patterns in investment duration and how monitoring frequencies influence investment preferences. 📊💡

### Key Insights & Findings:

- **Investment Choices:** Mutual Funds are the most popular, with 18 investors, followed by equity (10), fixed deposits (9), and PPF (3).
- **Monitoring Frequency:** Monthly monitoring is preferred by 29 investors, while weekly monitoring is chosen by 7. Daily monitoring is the least preferred, with only 4 investors.
- **Investment Duration:** The 3-5 year period is favored by 19 investors, while 1-3 years is close behind with 18. Durations of less than 1 year or more than 5 years are less popular.

# Task 5



## Task: Reasons for Investment

**Objective: Analyze and visualize the reasons for investment.**

### Steps:

- 1. Trend Analysis: Identify common trends in reasons for investment (e.g., Better Returns, Tax Benefits).**
- 2. Visualization: Create charts showing the most frequently cited reasons for investing.**

# Task 5: Reasons for Investment

## Duration

Better Returns

Fund Diversification

Tax Benefits

## Avenue

Daily

Monthly

Weekly

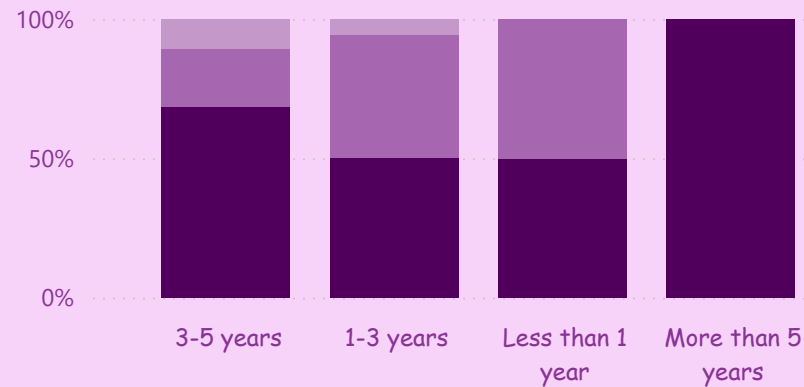
## Gender

Female

Male

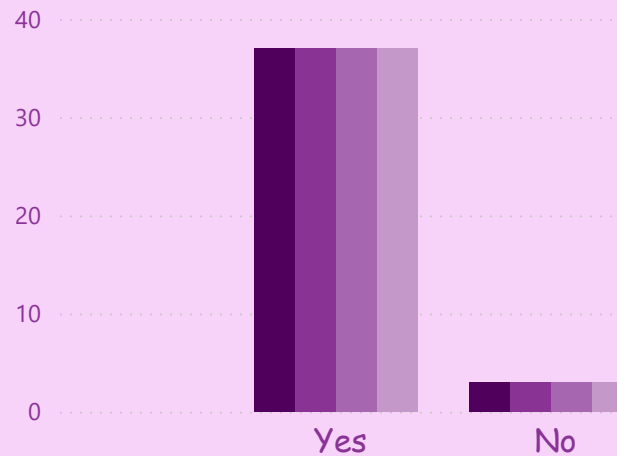
## Reason Mutual by Duration

● Better Returns ● Fund Diversification ● Tax Benefits



## Reasons of Investment

● Reason\_Bonds ● Reason\_Mutual ● Reason\_Equity ● Reason\_FD



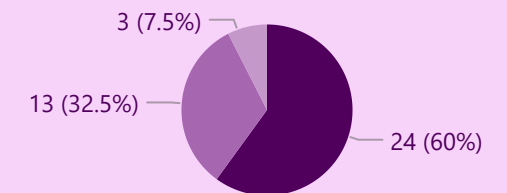
## Age

All

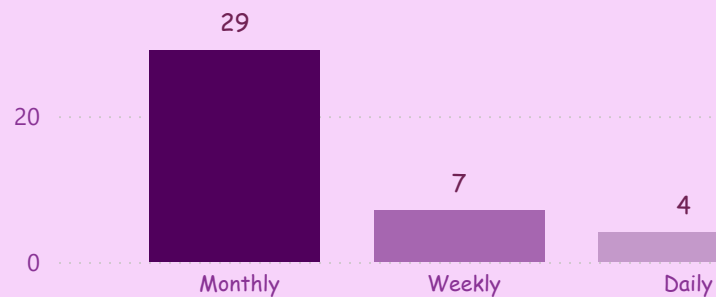


## Reason Mutual

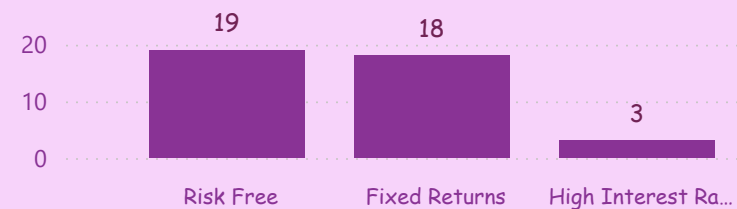
● Better Returns ● Fund Diversific... ● Tax Benefits



## Reason mutual by Invest Monitor

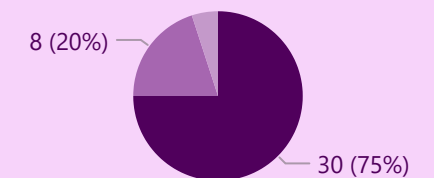


## Reason FD



## Reason Equity

● Capital Appreciation ● Dividend ● Liquidity





## Conclusion

I've been analyzing the **Reasons for Investment**, identifying key trends, and visualizing the most commonly cited factors that influence investment decisions. It's been a rewarding experience to dive deep into the data and uncover actionable insights. 📊💡

### Key Insights & Findings:

- **Top Reason for Investment:** Better returns are the most preferred reason, chosen by 24 investors, followed by fund diversification (13) and tax benefits (3).
- **Investment Duration:** The majority of investments are held for 3-5 years (19 investors), with 1-3 years close behind (18). Fewer investors prefer durations shorter than 1 year or longer than 5 years.
- **Monitoring Preferences:** Monthly monitoring is favored by 29 investors, while weekly monitoring is used by 7. Daily monitoring is the least preferred, with only 4 investors opting for it.

# Task 6



## Task: Source of Information

**Objective:** Analyze the sources from which individuals gather investment information.

### Steps:

1. **Source Analysis:** Visualize where individuals get their investment information (e.g., Newspapers, Internet).
2. **Insight Extraction:** Analyze which sources are most commonly relied upon by investors.

# Task 6: Source of Information

## Source By GB, PPF, Equity & Fixed Deposit

● Total equity market investment ● Total fixed deposit inves... ● Total government b... ● Total PPF



## Source

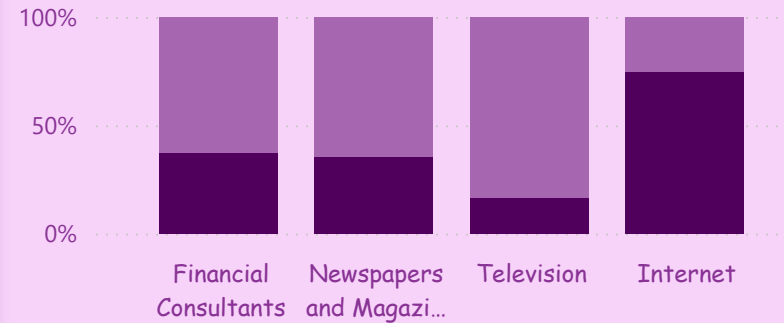


## Gender

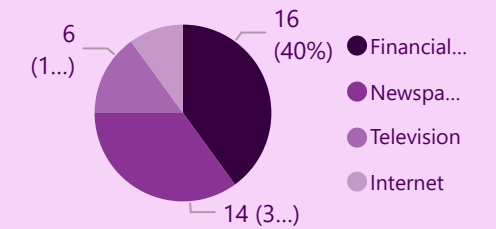
Female Male

## PPF By Source

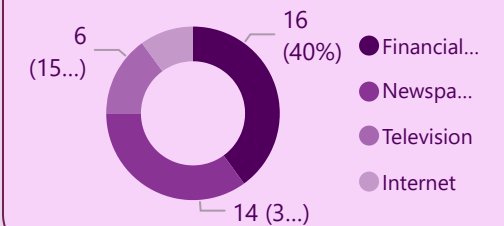
● Female ● Male



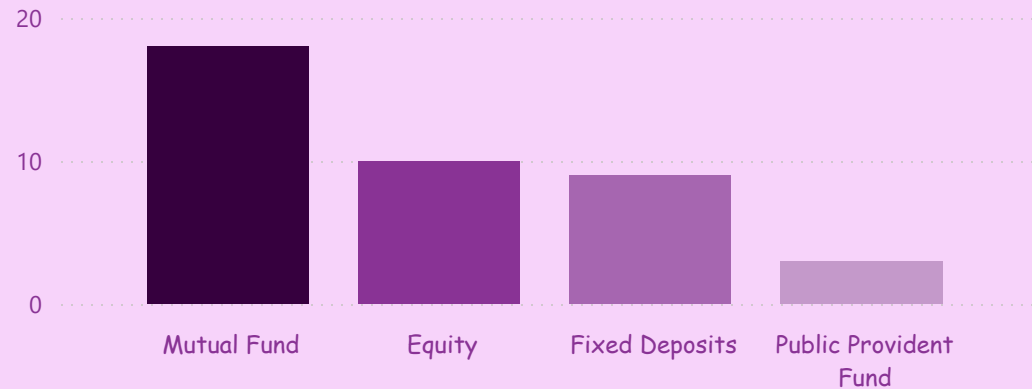
## Reason Mutual by Source



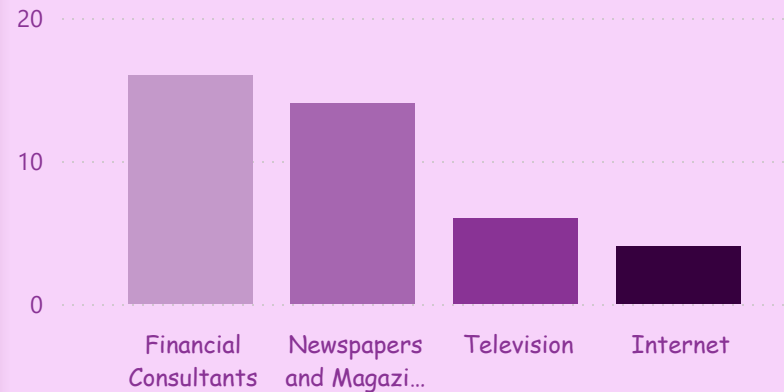
## Reason Equity by Source



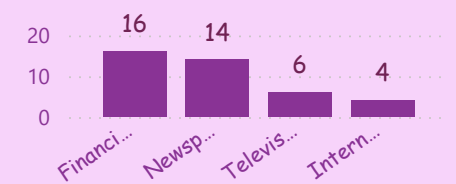
## Source by Avenue



## Avenue By Source



## Reason FD by source



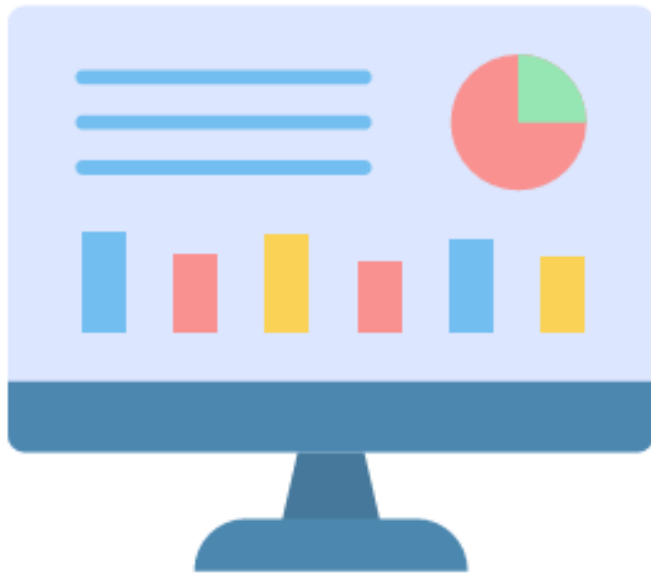
## Conclusion

In this task, I focused on analyzing the **Sources of Investment Information**, visualizing data to uncover trends and enhance our understanding of investor behaviors. This analysis provided valuable insights into where individuals gather their investment knowledge.

### Key Insights & Findings:

- .**Popular Sources:** Financial consultants are the top source, preferred by 16 investors, followed by newspapers and magazines with 14.
- .**Less Popular Sources:** Television (6) and the internet (4) are considered less popular information sources.
- .**Investment Preferences:** Mutual funds are the most preferred investment type, with 18 investors, followed by equity (10). Fixed deposits (9) and PPF (3) have lower interest, suggesting less appeal among investors.

# Task 7



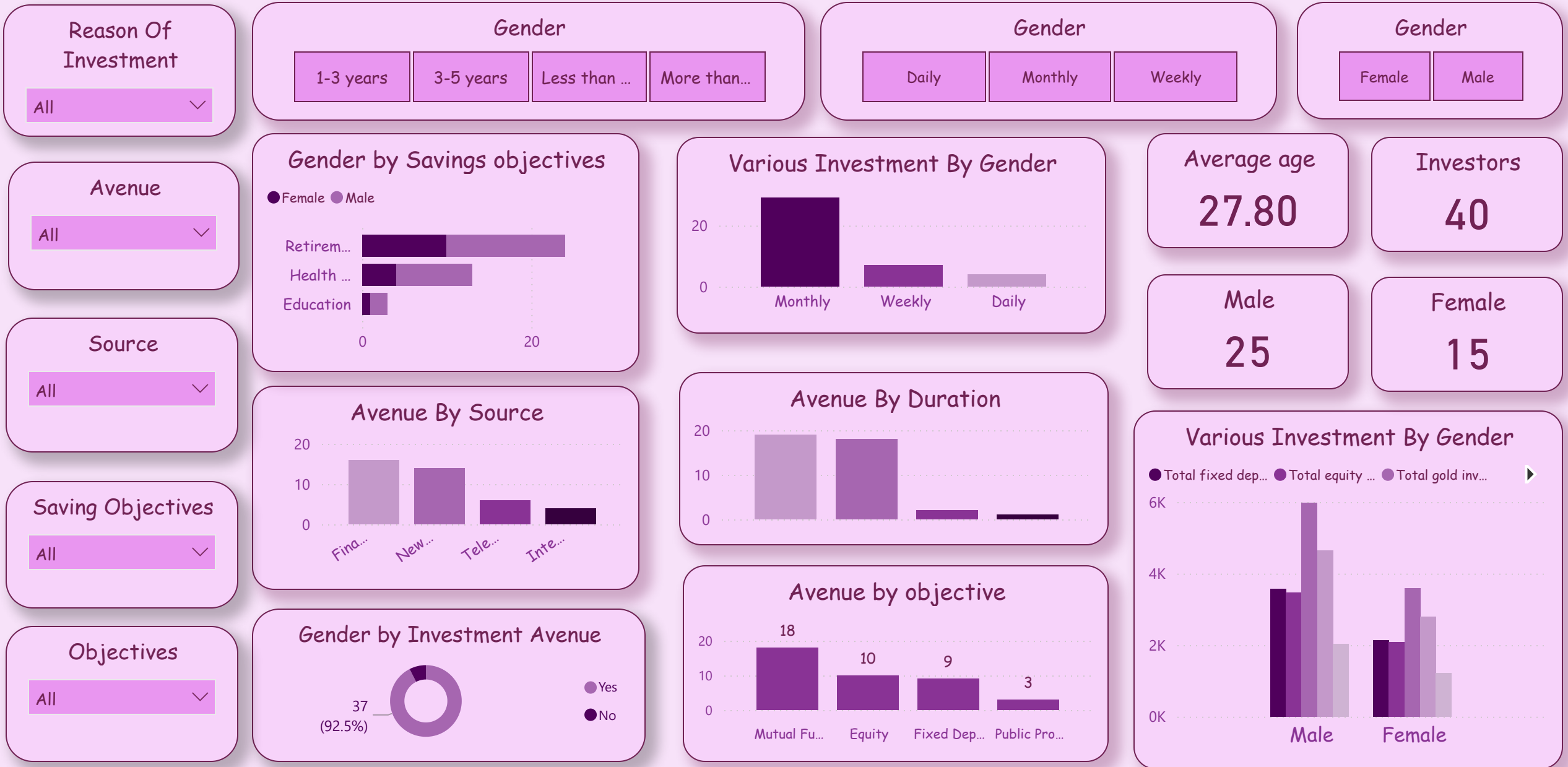
## **Task: Combine Insights into a Dashboard**

**Objective:** Create a comprehensive dashboard incorporating all insights.

### **Steps:**

- 1. Dashboard Design:** Design an intuitive dashboard layout in Power BI.
- 2. Incorporate Insights:** Include visualizations from all previous analyses in the dashboard.
- 3. Interactivity:** Add interactive elements for exploring the data further.
- 4. Key Findings:** Summarize major insights derived from the analysis.
- 5. Finalization:** Polish the dashboard for a professional appearance and user-friendly experience.

# Task 7: Combine Insights into a Dashboard



# Conclusion

I successfully integrated insights from all six tasks into a comprehensive dashboard, providing a holistic view of the data and key findings:

- ▲ **Task 1: Data Exploration and Summary** - This involved analyzing the dataset for overall trends in savings objectives and investment distribution.
  - ▲ **Task 2: Gender-Based Analysis** - I compared investment preferences between males and females, highlighting trends in equity, mutual funds, and government bonds.
  - ▲ **Task 3: Objective Analysis** - This focused on the relationship between savings objectives and various investment avenues, identifying capital appreciation as a leading goal.
  - ▲ **Task 4: Investment Duration and Frequency** - I analyzed how long investments are held and how often investors monitor their portfolios, revealing monthly monitoring as the most preferred frequency.
  - ▲ **Task 5: Reasons for Investment** - This involved analyzing the primary motivations behind investment decisions, with better returns emerging as the top reason.
  - ▲ **Task 6: Source of Information** - I visualized the sources investors use to gather information, with financial consultants and newspapers/magazines being the most popular choices.
- This dashboard combines all these insights into an interactive format, providing a clear view of key trends and behaviors in investment preferences and strategies.