Investment
Dashboard

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Investments Profile

Investments

- Obtaining useful insights from investment data to help investors make better decisions is the issue. Due to the abundance of data on companies, investors, funding rounds, and industry performance. It's necessary to optimize investment portfolios; forecast future results, identify success factors, and comprehend the current situation for everyday customers.

- Finding reliable information about investing in today's society is harder now than it has ever been. It has been highly saturated, especially with unreliable information; this can be shown through all social media platforms "60% of US investors under age 35 use social media as a source of investment information" (more information [here](#)). There are more people who get their investment insights from unreliable sources using social media than through financial advisors which their information is reliable. However, platform content is largely impacted by hidden algorithms, so postings with a lot of buzz may take precedence over quality. "In the first six months of 2023, the Federal Trade Commission reported losses totaling $2.7 billion from investment-related fraudulent scams initiated on social media in the US alone; 37% of those fraud losses were reported by investors aged 20-29" (more information [here](#)). These scams through social media have only gotten bigger.

- Due to this, we chose to create a company that would use their insights find companies that will increase revenue and this will also be available to customers so it every day people are able to understand what investments are good to make.

- Investments Inc. (INVT), a private investment corporation, and focuses on buying stock in businesses with promising future growth. INVT's primary objective is to acquire shares from reputable, financially stable companies in order to collaborate with them on growth. The company's main goal is to increase returns by making smart investments in these successful companies. As well as giving insight about these companies to customers. The analytics and advice of INVT is publicly available information used for themselves as well as their customers. These customers pay a monthly fee to get some insights of companies that INVT believes will increase their revenue.

- **1.1 Problem Statement**
- The number one most important concept when it comes to finance is investing, but how does the everyday person know where to invest? Why not follow the major titans of finance; time after time these institutes have preformed favorably.
- The main goal is to find useful insights from the provided dataset through descriptive, diagnostic, predictive, and prescriptive analytics. By offering data-driven suggestions that improve decision-making processes, optimize investment allocations, and discover high-potential opportunities while limiting risks, I am to exceed stakeholder expectations.

1.2 Problem Solution
- The aim is to provide stakeholders and potential investors with reliable insights through INVT to support informed decision-making. This involves analyzing information to understand funding patterns, identify high-potential investment opportunities, and allocate resources efficiently. Using a a user-friendly dashboard that is easy to use for continuous data exploration and decision assistance.

1.3 Research Method
- The research I will employ to learn more about useful insights into investments is descriptive analytics, diagnostic analytics, visual analytics, and top performers and trends. Descriptive analytics will be able to show the total funding amount, average funding per company, number of companies per state and industry, and distribution of funding throughout industries. Diagnostic analytics will show a correlation between the company's founding year and the amount of funding received. Visual analytics will show a creative dashboard that will visualize key metrics trends and predictions. And top performers and trends we'll show top performing companies throughout each industry in terms of funding.

Strategy

2.1 Strategy
- The strategy I will use is taking both my datasets and putting it into SQL and inner join these data sets. The script will show all the relevant information; only for companies that are in the US.
- From this sample dataset, I will use descriptive analytics, diagnostic analytics, visual analytics, and top performers and trends.
- These analytics are shown using a Tableau, and it will show stakeholders what companies are worth investing in. As well as which companies have performed so well that investors keep paying more capital.
- Finally, the findings will be presented in results
- **2.2 Strategy's Thoroughness**
- From Descriptive Analytics, stakeholders will be able to display the total funding amount, average funding per company, number of companies per state and industry, and funding distribution across industries
- From Diagnostic analytics, a correlation between the founding year and the amount of funding received.
- From Visual analytics, an innovative dashboard that shows key performance indicators, trends, and predictions. Additionally, I displayed trends and top-performing companies in terms of fundraising across all industries.

Results

3.1 Main Results
- The main results is the most funded companies are in the cleantech, and mobile. Biotech, mobile, and software are the most heavily funded sectors.

3.2 Top Funded Companies
- The top funded companies in order are Better Place at 725 million, Good Technology, KAYAK, Pearl Therapeutics, PayPal, Aperto Networks, Infinia, Yammer, Dexterra, Kovio. BetterPlace has $444 million more funding than 2nd place. Better Place has had 5 rounds of funding and they have a massive price.
- 6.8% of all funding for the cleantech sector comes from Better Place
- This company is the best to invest in because other investing companies have invested in this, which means they believe that Better Place's stock will increase. I also believe this because of all the analysis on this company and the fact that the sector is cleantech which specializes in cleaner technologies like EV's; cleantech can help save the environment and this is a company that people can buy on top of the fact that they have a massive amount of funding.

Effects
Describe the anticipated effects of your strategy

3.1 Main Results
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3.3 Top Funded Sectors
- Biotech, mobile, and software are all highly funded sectors and this trend reflects their significant potential for growth and impact. These three sectors make sense and these are something worth investing in.
- Biotech is constantly moving working on groundbreaking technologies and treatments. If there is a groundbreaking discovery this is now an unsaturated market so there is a lot of potential for high returns.
- Mobile will always have more people use more devices, especially the younger generation. Any apps, telecommunications, hardware, and technologies related to mobile is more revenue for the sector
- Software will always have something new to codes and company's want to use. Companies pay a premium for the specific software. Software has reoccurring revenue from these companies; and high scalability

3.4 Anticipated Effects
- The anticipated effects is that the more total funding a company has the higher the price amount would be.
- When there is more total funding for a company, there's usually a few rounds of investments
- California has the highest number of companies with 553.

3.5 Other Effects
- Biotech's increasing financing can accelerate the development of new medications and therapeutic approaches, resulting in significant advances in medical science and better patient outcomes. As well as the economic growth of these advancements can create new jobs.
- Another effect I found surprising is when I did a inner join not all companies are in each of the 50 states. This was very surprising because there is a empty space in the Midwest.

4.1 Measuring's effect on data

- The dashboard's comprehensive analytics and clear visualizations will help simplify the process of making well-informed investment decisions. I will measure its effectiveness by examining investment results and hearing from users about how the dashboard influences their choices.
- Using the dashboard, I hope to optimize investment allocation to maximize returns while minimizing risk. Key indicators will be tracked in order to assess its success.
- By analyzing sector performance and financing trends, the dashboard will assist me in identifying the greatest investment possibilities. By seeing how successfully investments in these possibilities perform and yield returns, I will be able to determine how effective it is.

Conclusion

- In conclusion, by highlighting the variables that influence returns and the best places to put money, the dashboard will assist stakeholders and potential investors in making more informed decisions. To make sure we're enhancing our investing methods and identifying the best prospects for improved results, we'll monitor performance using important measures.