



DATA ANALYSIS BY USING POWER BI

# TASK LIST



**Welcome to our exciting PowerBI internship program! To complete this internship, you will have to complete all 7 tasks. We've designed these tasks to cater to your convenience and ensure an engaging and rewarding experience.**

# 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 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 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 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 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 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 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.

