

FINAL REPORT – Investment Analysis Using Power BI

Cognifyz Technologies – Power BI Internship

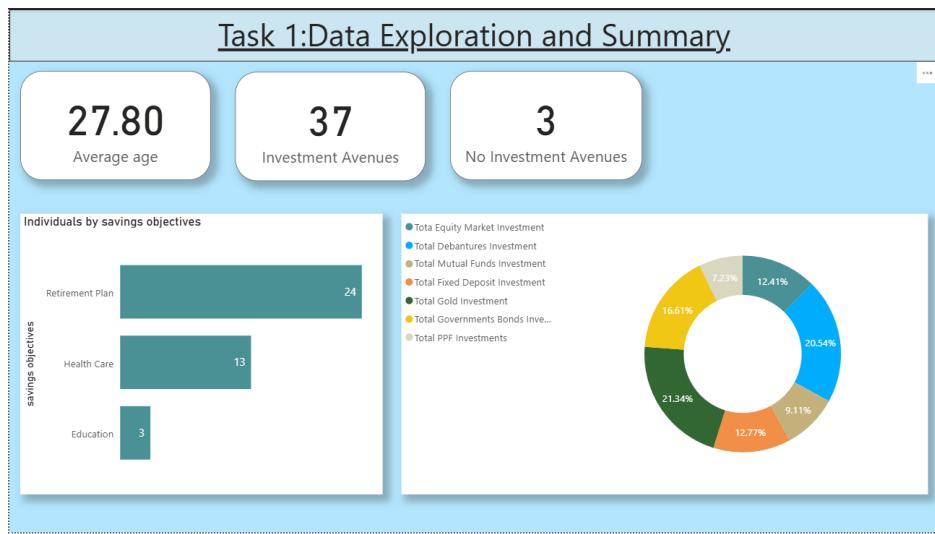
Task 1 – Data Exploration and Summary

Objective:

To understand the dataset structure, identify data types, compute basic statistics, and visualize summary metrics.

Explanation:

- The dataset was imported into Power BI using *Get Data → Text/CSV*.
- Each column's data type was validated (Age → Whole Number, Income → Decimal Number, etc.).
- DAX measures were created to compute key values such as **Average Age**, **Investment Count**, and **Savings Objectives**.
- Visuals such as *Pie Charts*, *Bar Charts*, and *Cards* were used to represent:
 - Age distribution
 - Investment categories
 - Savings objectives



Task 2 – Gender-Based Analysis

Objective:

Analyze differences between male and female investors across investment avenues.

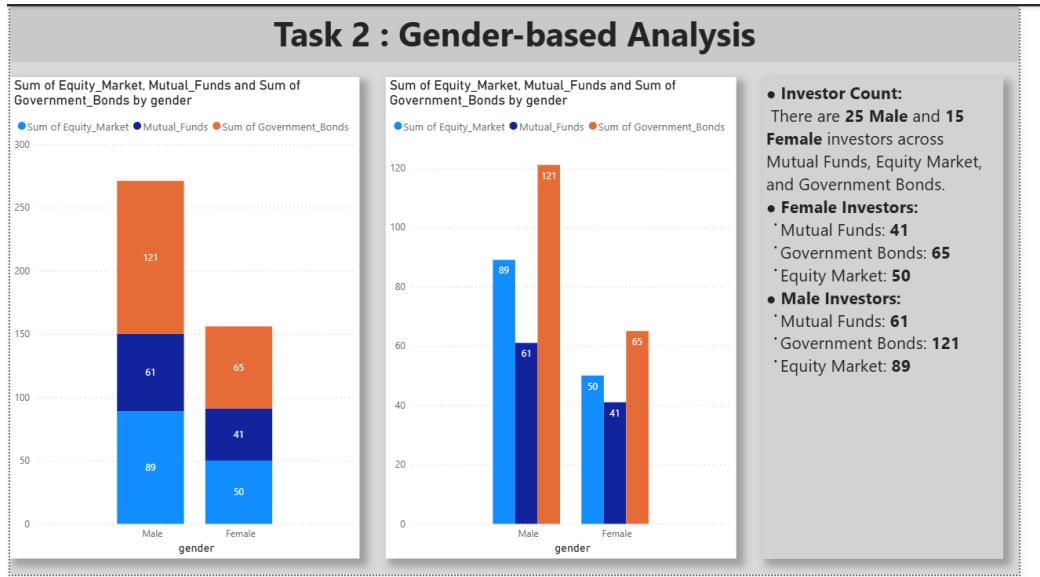
Explanation:

- A **bar chart** and **clustered column chart** were created to compare Male vs. Female across:
 - Mutual Funds
 - Equity Market
 - Government Bonds
- A slicer was added for Gender to enable dynamic filtering.

Key Insights:

- Male investors have significantly higher investment counts across all three categories.
- Government Bonds have the highest investment count for both genders.

- Female investment distribution is more balanced compared to males.



Task 3 – Objective Analysis

Objective:

Understand how savings objectives influence investment choices.

Explanation:

- Relationship between Savings Objective and Investment Avenue was analyzed.
- Used **Clustered Column Chart** to map objectives (Growth, Income, Capital Appreciation) to investment types.
- Additional analysis performed using DAX and filtering.

Key Insights:

- Capital Appreciation investors prefer **Mutual Funds** and **Equity**.
- Income-focused investors show interest in **Fixed Deposits**.
- PPF and FD are chosen more for stable growth.



Task 4 – Investment Duration & Monitoring Frequency

Objective:

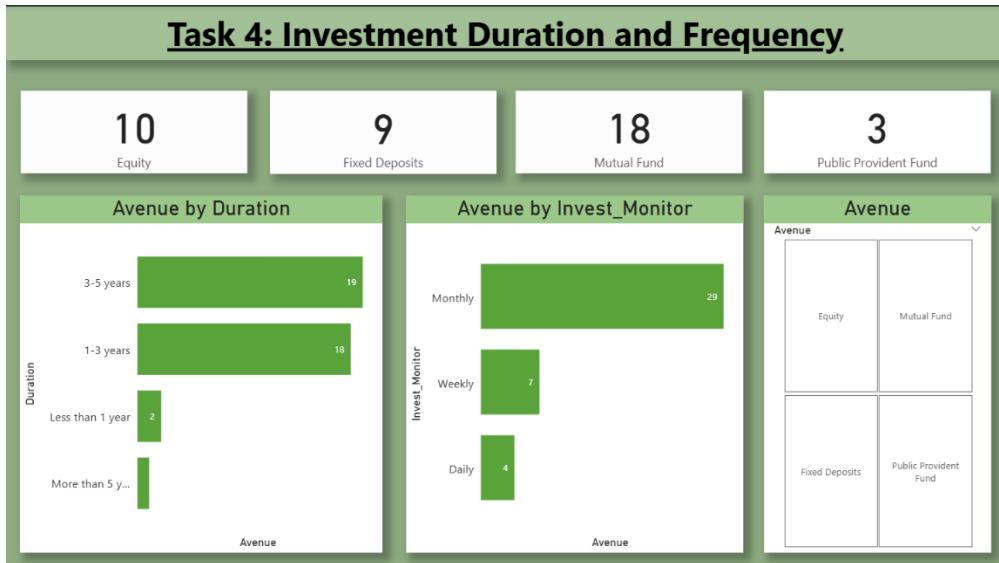
Examine how long investors stay invested and how frequently they monitor their portfolio.

Explanation:

- A **Column Chart** was used to display investment duration categories:
 - Less than 1 year
 - 1–3 years
 - 3–5 years
 - Above 5 years
- A **Bar Chart** visualized monitoring frequency:
 - Daily
 - Weekly
 - Monthly

Key Insights:

- Majority prefer **3–5 years** and **1–3 years** duration.
- Monthly monitoring is most common.
- Mutual Funds dominate across duration and monitoring categories.



Task 5 – Reasons for Investment

Objective:

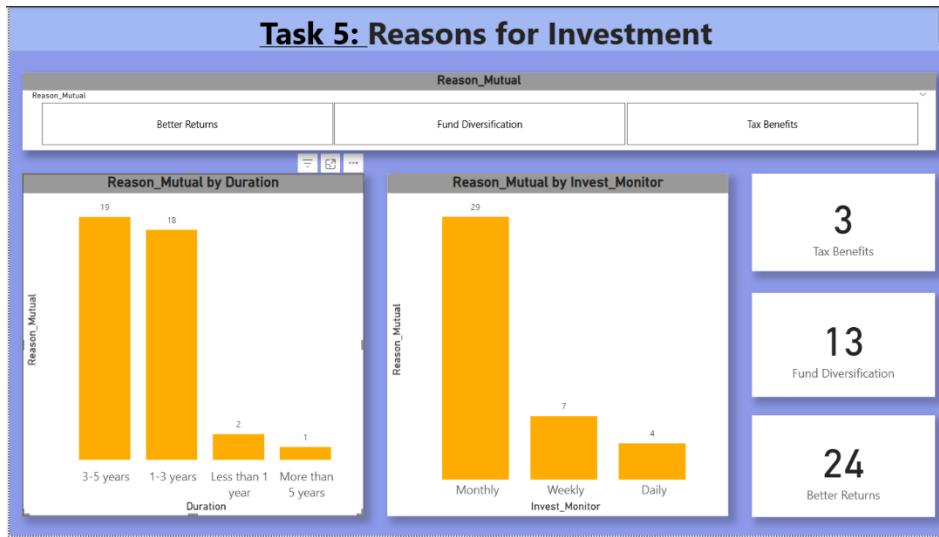
Identify the main motivations behind investment decisions.

Explanation:

- A **Pie Chart / Bar Chart** was created to highlight reasons:
 - Better Returns
 - Tax Benefits
 - Retirement Planning

Key Insights:

- Better Returns is the top motivation across all investor groups.
- Tax Benefits and Retirement Planning follow behind.



Task 6 – Source of Information

Objective:

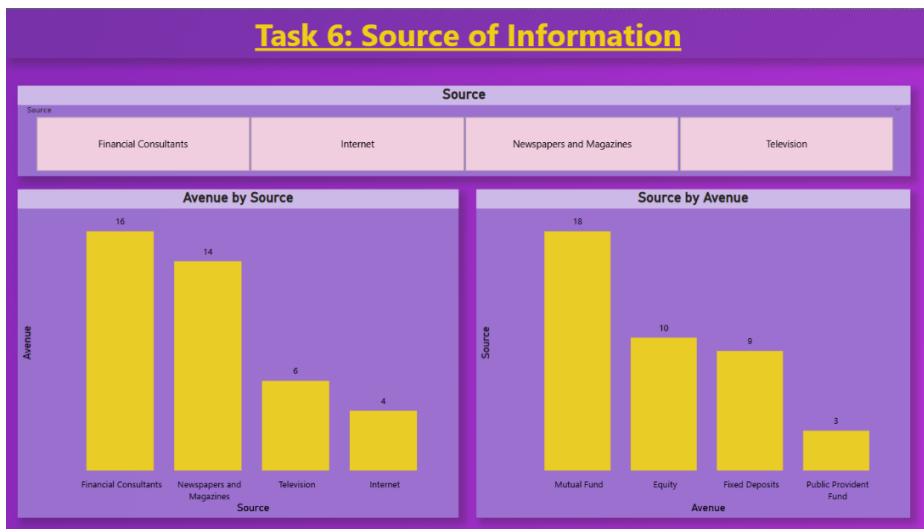
Analyze where investors obtain financial and investment knowledge.

Explanation:

- A column chart was used to compare sources such as:
 - Financial Consultants
 - Internet
 - Newspapers/Magazines
 - Friends & Family
- Visuals were mapped with Investment Avenues for deeper comparison.

Key Insights:

- **Financial Consultants** are the most trusted source.
- Digital media is surprisingly less preferred.
- PPF and FD rely heavily on consultant guidance.



Task 7 – Final Dashboard

Objective:

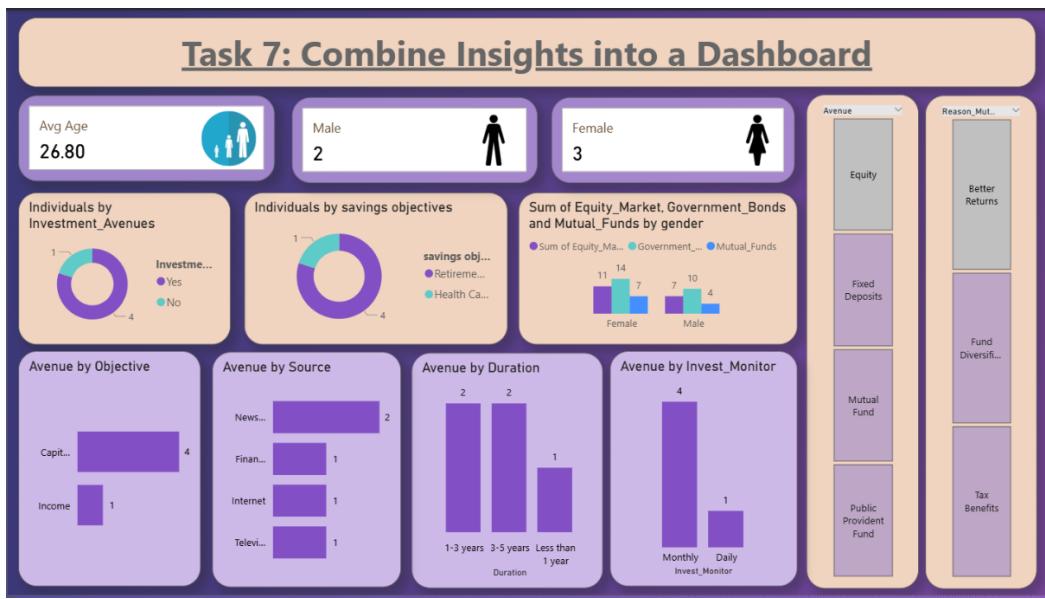
Combine all insights into a single interactive dashboard.

Explanation:

- Unified visuals from all tasks were placed into a professional dashboard.
- Slicers were added for **Gender**, **Investment Avenue**, and **Savings Objective**.
- Cards displayed KPIs such as:
 - Total Investors
 - Most Preferred Investment Avenue
 - Average Age

Key Insights:

- Mutual Funds are the highest-preferred investment type.
- Male investors dominate the dataset.
- Capital Appreciation is the most common savings objective.



Conclusion

- Investors prefer moderate to long-term investments (1–5 years).
- Mutual Funds and Equity attract investors with growth and appreciation goals.
- Financial consultants play a major role in investment decisions.
- Dashboard provides clear, interactive analysis of investor behavior.

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