

**DATA EXPLORATION AND
SUMMARY**

GENDER BASED ANALYSIS

OBJECTIVE ANALYSIS

**INVESTMENT DURATION AND
FREQUENCY**

REASON FOR INVESTMENTS

SOURCE OF INFORMATION

INSIGHTS



COGNIFYZ POWER BI INTERNSHIP

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GENDER

Female

Male

OBJECTIVE

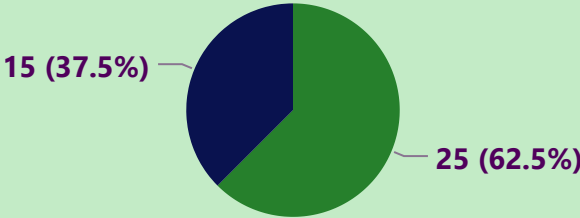
Capital Appreciation

Growth

Income

INVESTMENTS BY GENDER

● Male ● Female



AVERAGE OF AGE

27.80

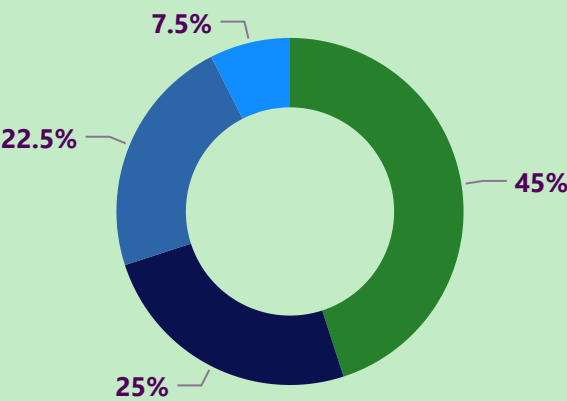
OBJECTIVES BY GENDER

● Female ● Male



INVESTMENTS BY AVENUE

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



DATA EXPLORATION AND SUMMARY

KEY INSIGHTS DRIVEN FROM THE ABOVE VISUALS:

Mutual Fund had the highest Count of Investment_ Avenues at 18, followed by Equity, Fixed Deposits, and Public Provident Fund. Mutual Fund accounted for 45.00% of Count of Investment_ Avenues. Total Count of gender was higher for Male (25) than Female (15). Retirement Plan in gender Male made up 35.00% of Count of gender. Average Count of gender was higher for Male (8.33) than Female (5). Count of gender for Male and Female diverged the most when the What are your savings objectives? was Health Care, when Male were 5 higher than Female.

AVERAGE OF GOLD

5.98

AVERAGE OF MUTUAL FUNDS

2.55

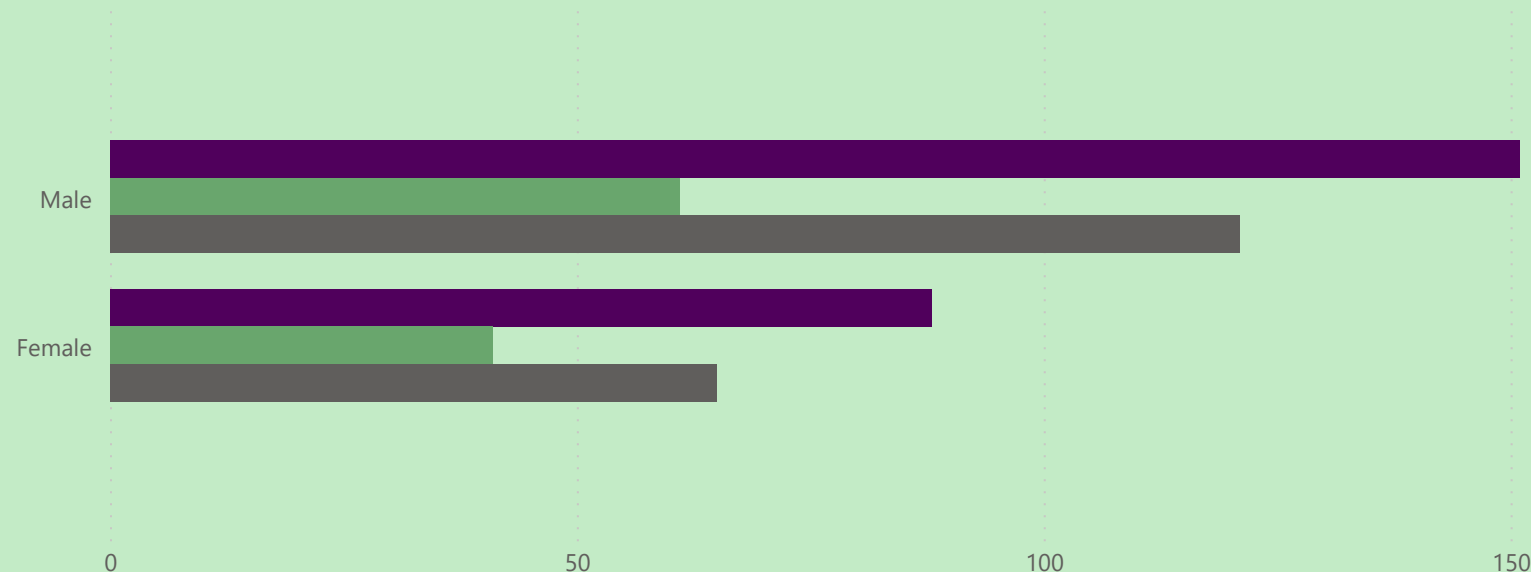
AVERAGE OF GOVERNMENT
BONDS

4.65

GENDER BASED ANALYSIS

Gold, Mutual_Funds and Government Bonds by Gender

● Sum of Gold ● Sum of Mutual_Funds ● Sum of Government_Bonds

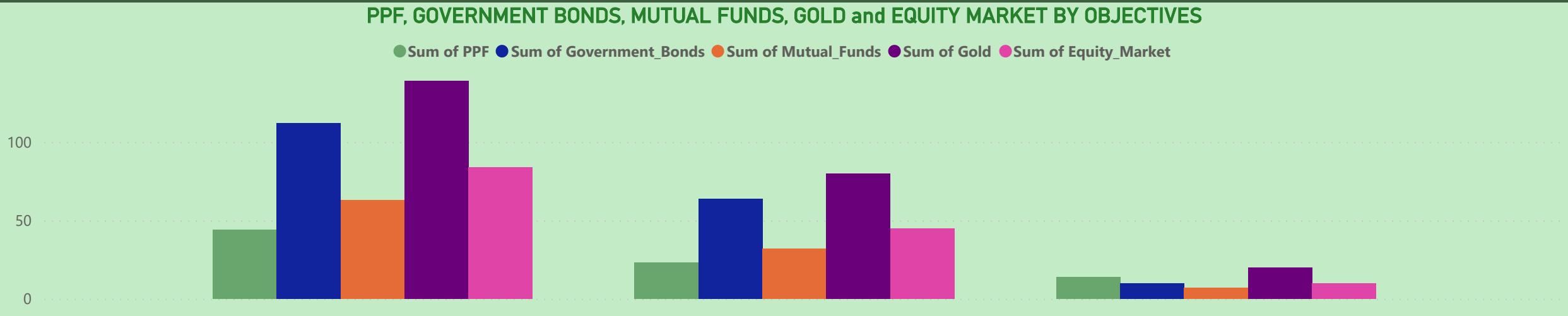


KEY INSIGHTS DRIVEN FROM THE ABOVE VISUALS:

Sum of Gold and total Sum of Mutual_Funds are positively correlated with each other. Male accounted for 63.18% of Sum of Gold. Female had 88 Sum of Gold, 41 Sum of Mutual_Funds, and 65 Sum of Government_Bonds. Male had 151 Sum of Gold, 61 Sum of Mutual_Funds, and 121 Sum of Government_Bonds.

Avenue	Capital Appreciation	Dividend	Liquidity	Total
Equity	18	4		22
Fixed Deposits	12	8		20
Mutual Fund	36	8	7	51
Public Provident Fund	7		2	9
Total	73	20	9	102

OBJECTIVE ANALYSIS



KEY INSIGHTS DRIVEN FROM THE ABOVE VISUALS:

At 44, Retirement Plan had the highest Sum of PPF and was 214.29% higher than Education, which had the lowest Sum of PPF at 14.Sum of PPF and total Sum of Government Bonds are positively correlated with each other. Retirement Plan accounted for 54.32% of Sum of PPF. Retirement Plan had 44 Sum of PPF, 112 Sum of Government Bonds, and 63 Sum of Mutual Funds. Health Care had 23 Sum of PPF, 64 Sum of Government Bonds, and 32 Sum of Mutual Funds. Education had 14 Sum of PPF, 10 Sum of Government Bonds, and 7 Sum of Mutual Funds.

GENDER

Female

Male

EXPECT

10%-20%

20%-30%

30%-40%

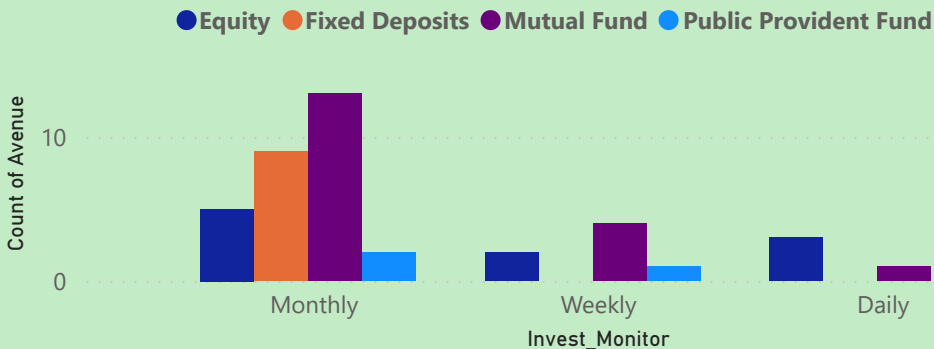
AGE

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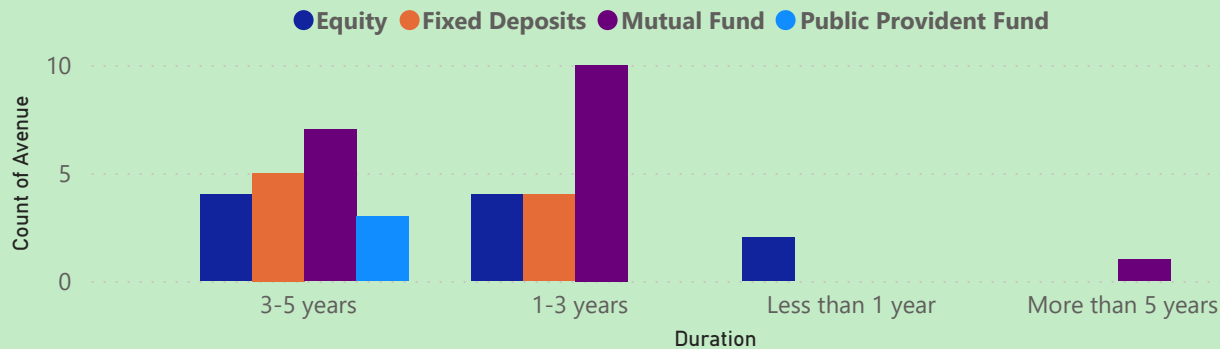
35

INVESTMENT DURATION AND FREQUENCY

Count of Avenue by Invest_Monitor and Avenue



Count of Avenue by Duration and Avenue



KEY INSIGHTS DRIVEN FROM THE ABOVE VISUALS:

Mutual Fund had the highest total Count of Avenue at 18, followed by Equity at 10 and Fixed Deposits at 9. 1-3 years in Avenue. Mutual Fund made up 25.00% of Count of Avenue. Mutual Fund had the highest average Count of Avenue at 6, followed by Fixed Deposits at 4.50 and Equity at 3.33.

GENDER

Female

Male

REASON FOR INVESTMENTS

Reason_Mutual

☐ Better Returns

☐ Fund Diversification

☐ Tax Benefits

Reason_Equity

☐ Capital Appreciation

☐ Dividend

☐ Liquidity

Reason_Bonds

☐ Assured Returns

☐ Safe Investment

☐ Tax Incentives

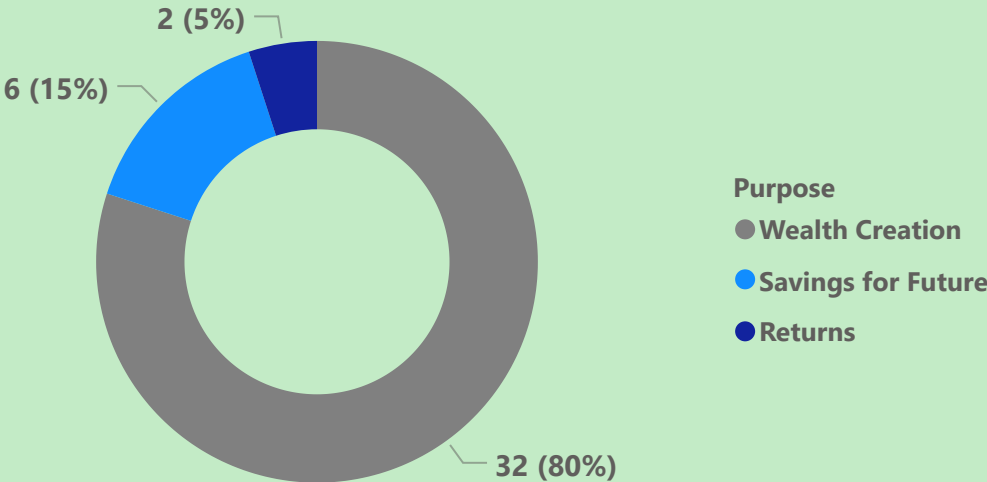
Reason_FD

☐ Fixed Returns

☐ High Interest Rates

☐ Risk Free

INVESTMENTS BY PURPOSE



KEY INSIGHTS DRIVEN FROM THE ABOVE VISUALS:
Count of Purpose for Wealth Creation (2) was higher than Returns (1).
Wealth Creation accounted for 66.67% of Count of Purpose.

GENDER

Female
Male

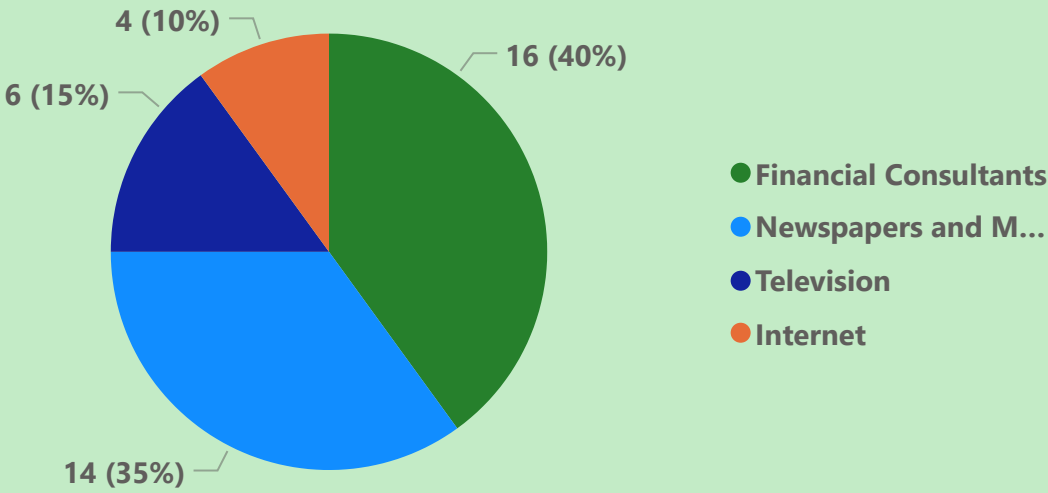
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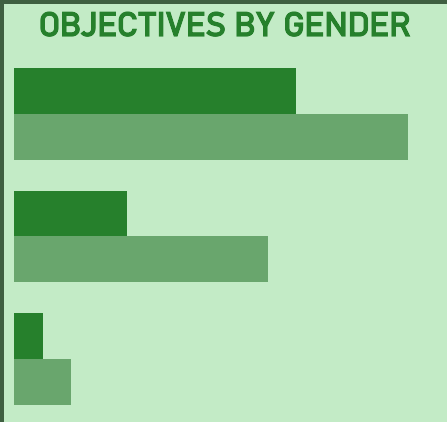
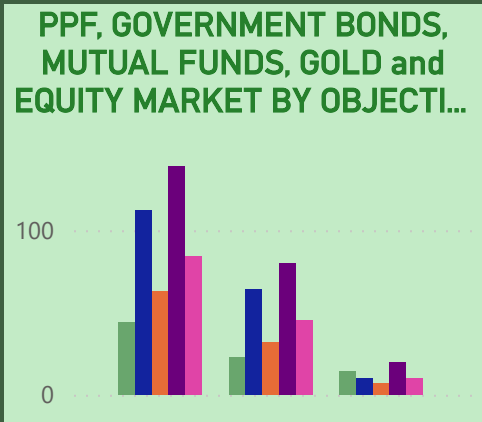
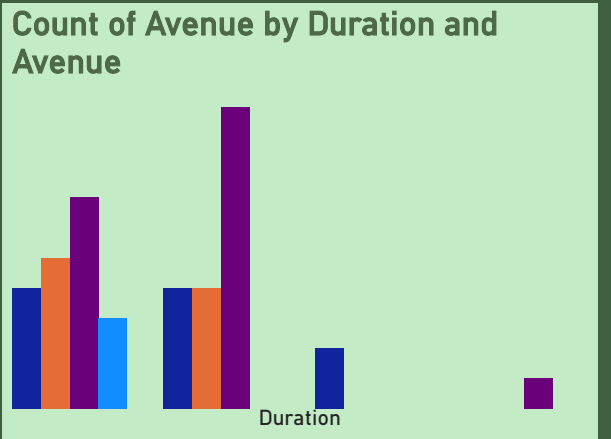
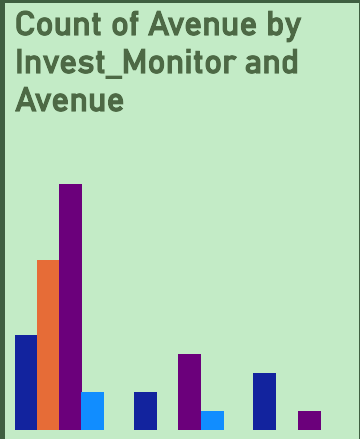
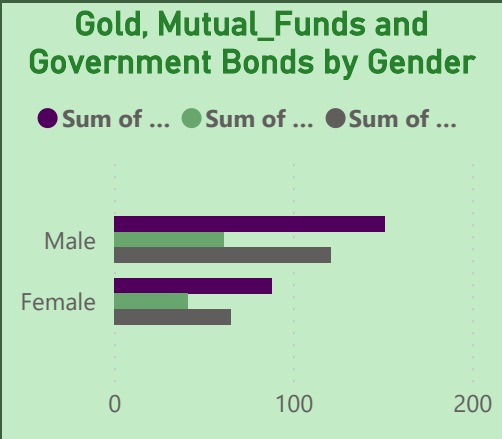
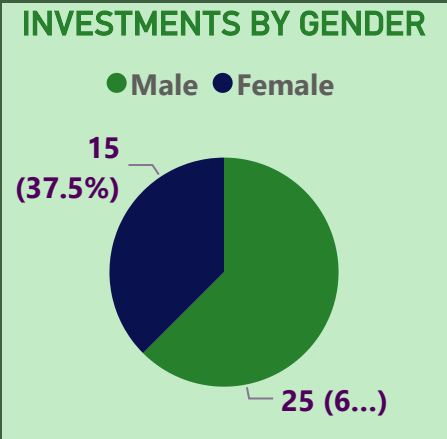
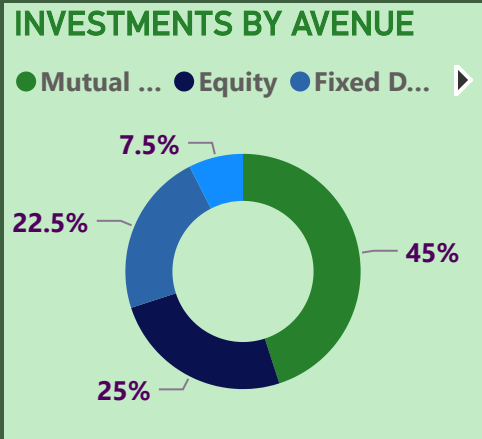
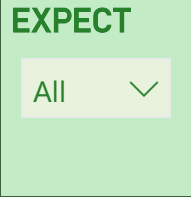
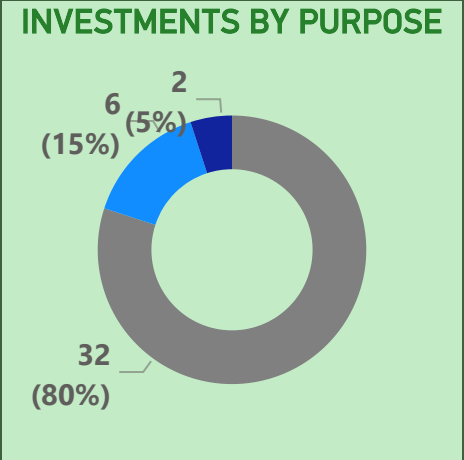
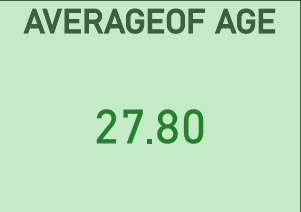
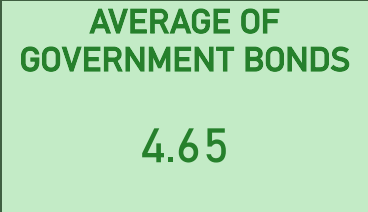
21	25	29	34
22	26	30	35
23	27	31	
24	28	32	

KEY INSIGHTS DRIVEN FROM THE ABOVE VISUALS:
Financial Consultants had the highest Count of Source at 16, followed by Newspapers and Magazines, Television, and Internet.
Financial Consultants accounted for 40.00% of Count of Source.

SOURCE OF INFORMATION

SOURCE BY INFORMATION





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