# Gold Layer: Tables and Views

## Gold Layer Tables (Prefix: tbl\_)

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| Table Name | Description |
| tbl\_client\_profile | Combines cleaned client information with derived fields (e.g., client tenure, age category). Used for segmentation, KYC, and personalization. |
| tbl\_account\_summary | Holds account-level aggregates such as total investment, account age, and status. Used in dashboards and client overviews. |
| tbl\_transaction\_fact | Denormalized transaction fact table used for analytics and KPIs, includes links to accounts and market data. |
| tbl\_security\_prices | Cleaned and validated market data with symbols, date, and price metrics. Used for NAV and investment performance calculations. |
| tbl\_aum\_snapshot | Daily snapshot of total assets under management per client/account. Supports historical trends and growth analysis. |

## Gold Layer Views (Prefix: v\_)

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| View Name | Description |
| v\_client\_investment\_summary | Aggregates client investments across all accounts, includes total value, account types, and risk profile. Used by advisors and reporting tools. |
| v\_transaction\_kpi | Calculates key metrics such as buy/sell volume, average trade value, and turnover rate. Supports trading performance analysis. |
| v\_client\_risk\_matrix | Displays clients categorized by risk rating and portfolio value, used for compliance and advisory services. |
| v\_account\_performance | Combines transactions and market data to show portfolio growth, realized/unrealized gains, and performance ratios. |
| v\_fee\_analysis | Extracts and calculates fees over time, by client or account. Useful for revenue reporting and optimization. |
| v\_data\_quality\_monitor | Displays failed data quality checks (e.g., missing client IDs, invalid dates) for operational monitoring. |