

Task I : Data Exploration and Summary

27.80

Average of age

37

Yes Investment Avenues

3

NO Investment Avenues

Retirement Plan

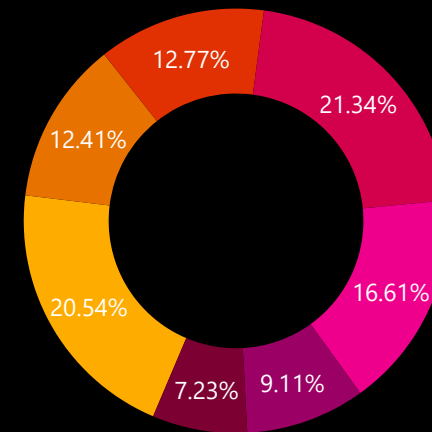
24

Health Care

13

Education

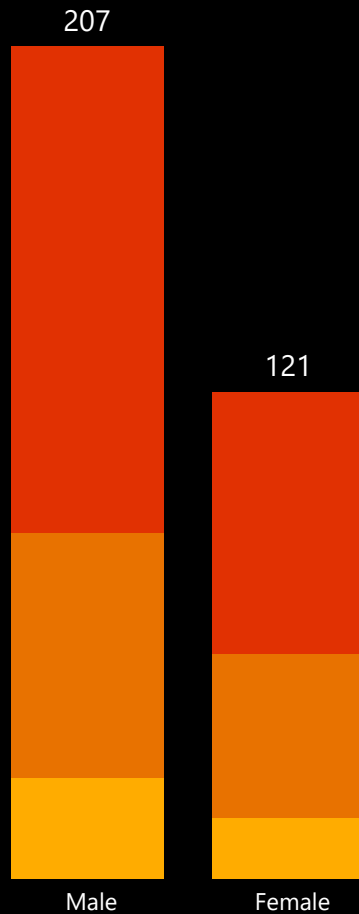
3



● Debtentures ● Equity ... ● Fixed De... ● Gold ● Govern... ● Mutual F... ● PPF Invest...

Task II : Gender Based Analysis

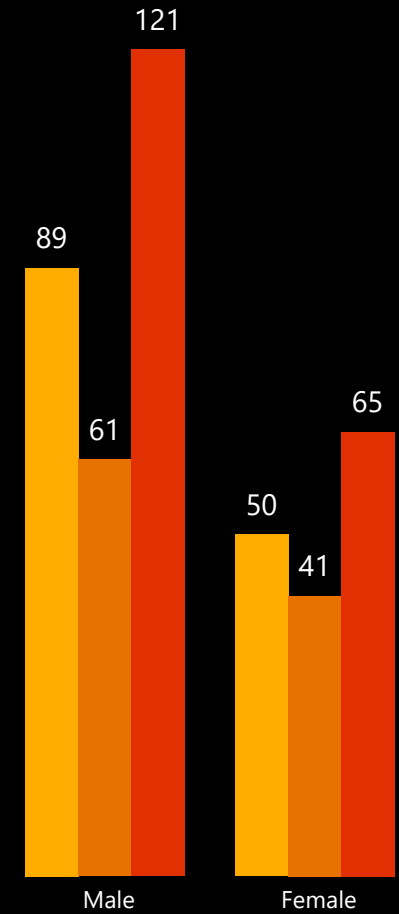
● Equity_Market ● Mutual_Funds ● Government_Bonds



Key Insights:

- In the Mutual Fund, Equity Market, and Government Bonds there are 25 Male and 15 Female investors.
- In the case of Female Investors, the sum of investment amount of Mutual Funds is 41, Government bonds is 65, and Equity Market is 50.
- In the case of Male Investors, the sum of investment amount of Mutual Funds is 61,

● Equity_Market ● Mutual_Funds ● Government_Bonds



Task III: Objective Analysis

-1

Pearson Correlation

Equity

Mutual Fund

Fixed Deposits

Public Provident Fund

Avenue by Objective

26

Capital Appreciation

11

Growth

3

Income

Task IV: Investment Duration and Frequency

(Blank)

Equity

(Blank)

Fixed Deposits

(Blank)

Mutual Fund

3

Public Provident Fund

Count of Avenue by Duration

Duration

3-5 years



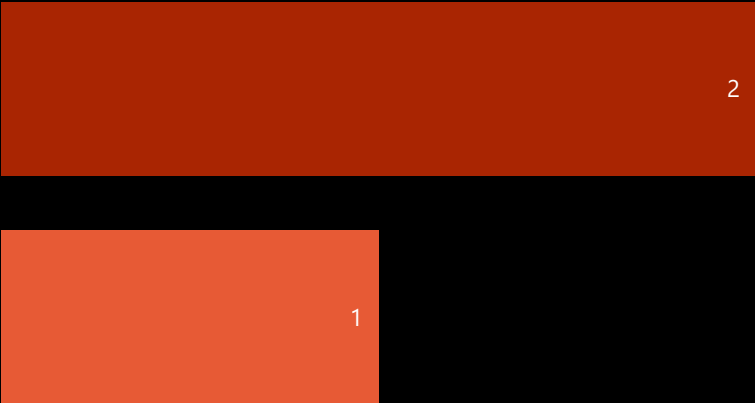
Count of Avenue

Count of Avenue by Invest_Monitor

Invest_Monitor

Monthly

Weekly



Count of Avenue

Equity

Fixed Deposits

Mutual Fund

Public Provident
Fund

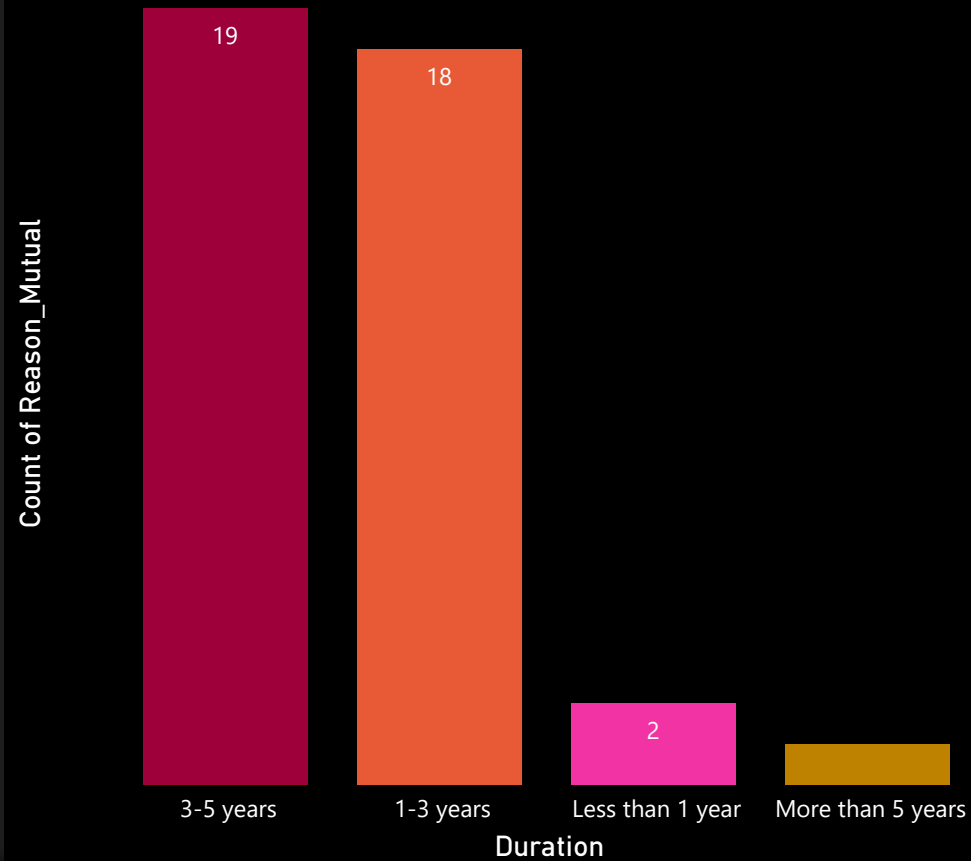
Task V: Reasons of Investment

Better Returns

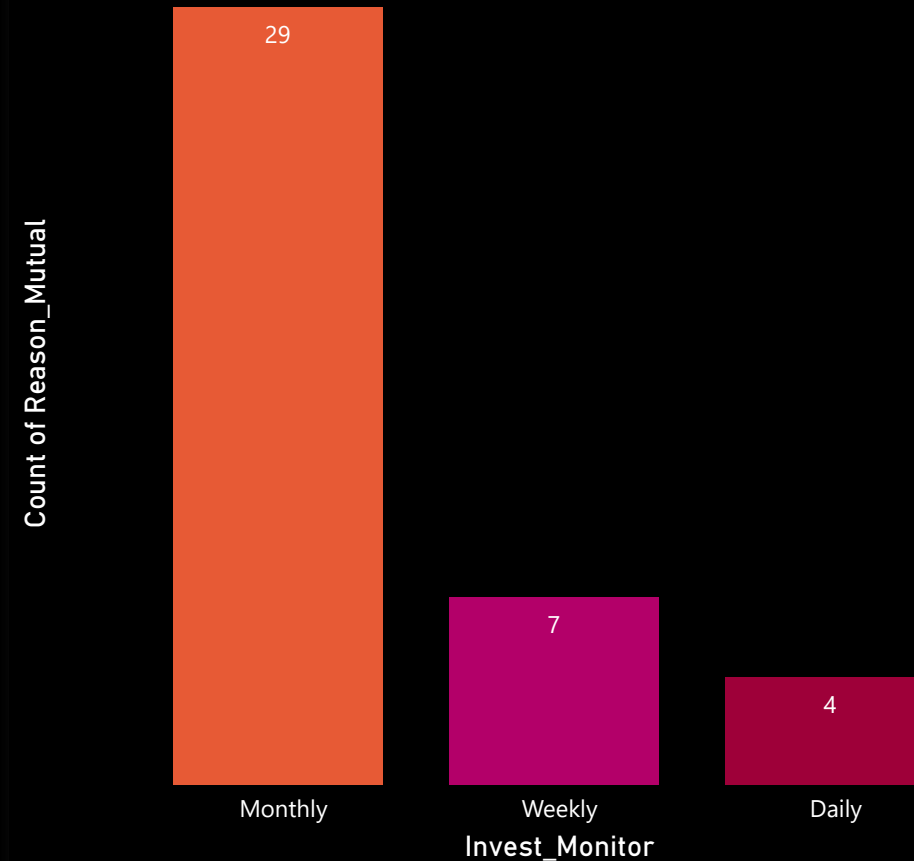
Fund Diversification

Tax Benefits

Count of Reason_Mutual by Duration



Count of Reason_Mutual by Invest_Monitor



3

Tax Benefits

13

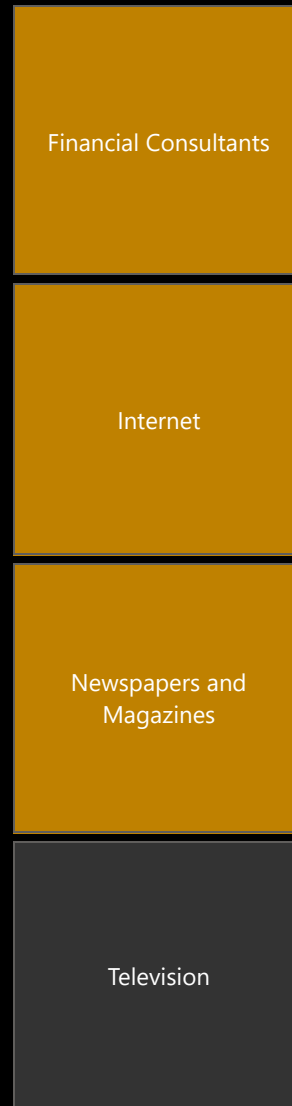
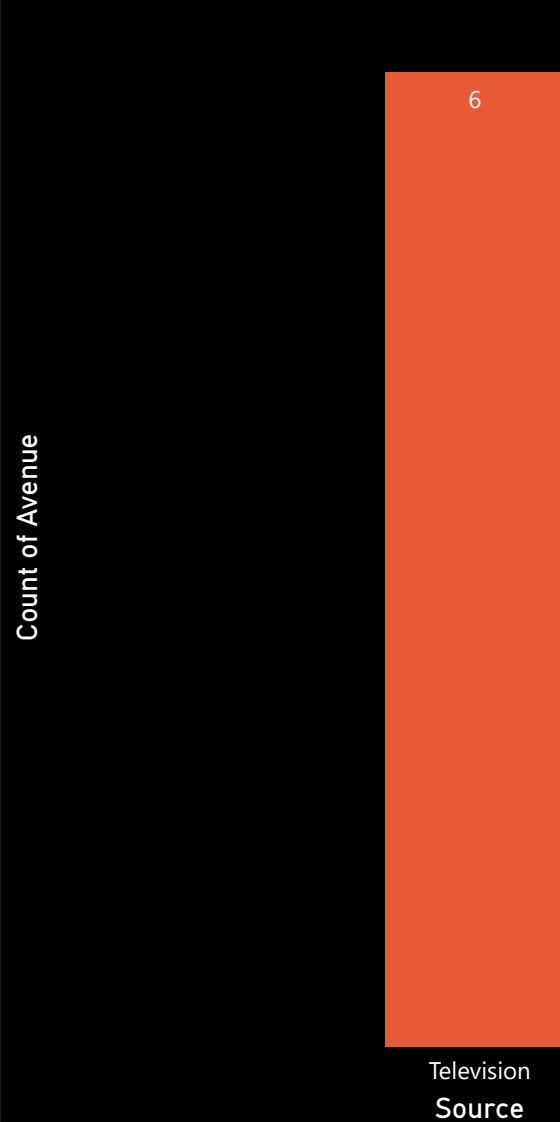
Fund Diversification

24

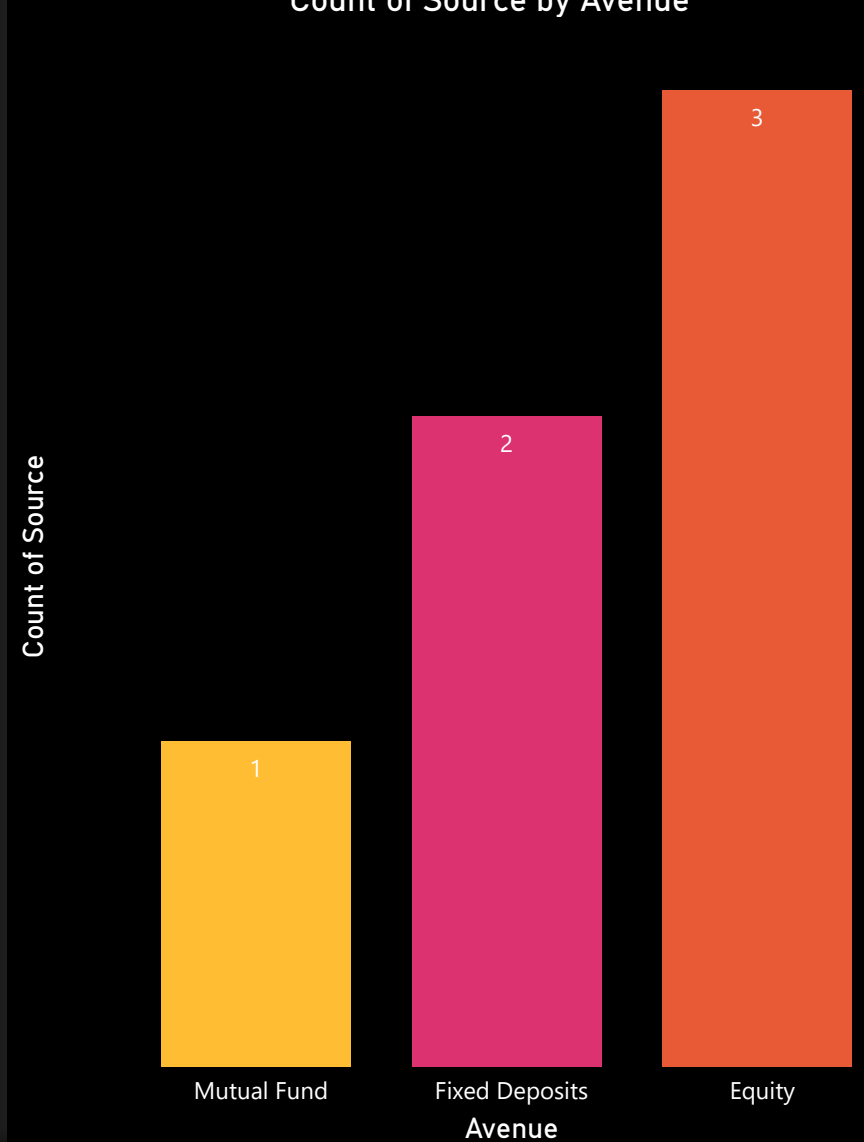
Better Returns

Task VI: Source of Information

Count of Avenue by Source



Count of Source by Avenue



Task VII: Combine Insights into a Dashboard

Equity

Fixed
Deposits

Mutual
Fund

Public
Provident
Fund

AVG Age
27.80



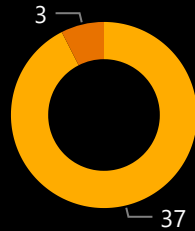
Male



Female

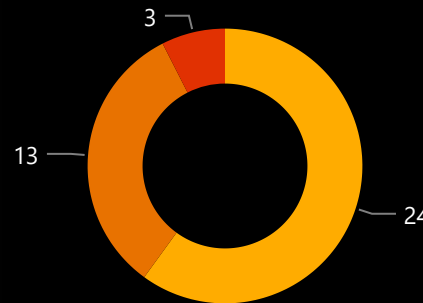


Better
Returns



Investment...

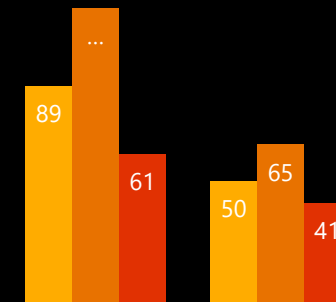
- Yes
- No



savings obj...

- Retiremen...
- Health Care
- Education

Equity_Market Government_Bonds Mutual_Funds



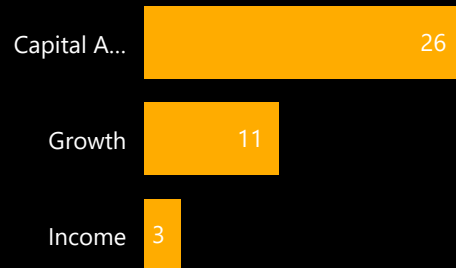
Male

Female

Fund Diversifi...

Count of Avenue by Objective

Objective



Count of Avenue

Count of Avenue by Source

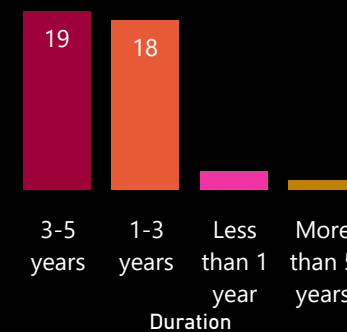
Source



Count of Avenue

Count of Avenue by Duration

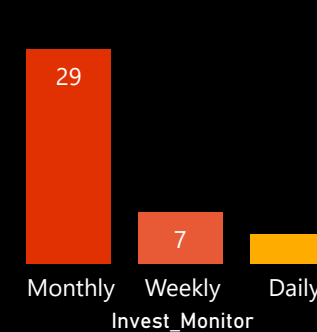
Count of Avenue



Duration

Count of Avenue by Invest_Monitor

Count of Avenue



Invest_Monitor

Tax
Benefits