

# TASK 7

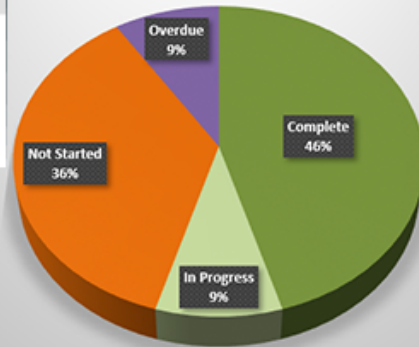


## Project Dashboard Template

PM ProjectManager

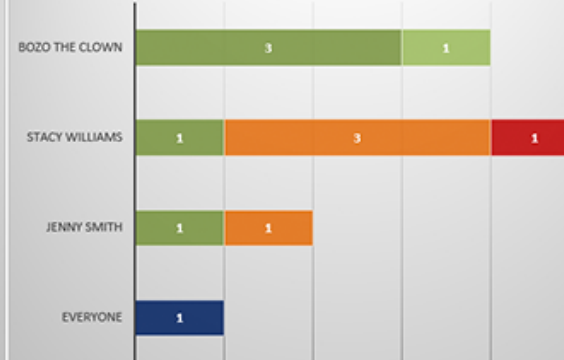
### Tasks

Complete In Progress Not Started Overdue

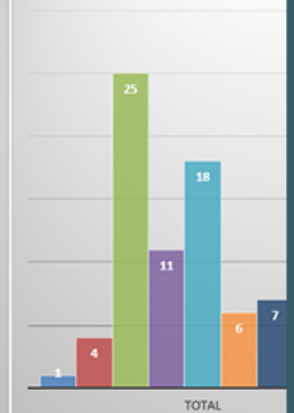


### Workload

Complete In Progress Not Started Overdue (blank)



### Task L



### Cost

Total



# TASK - COMBINE INSIGHTS INTO DASHBOARD

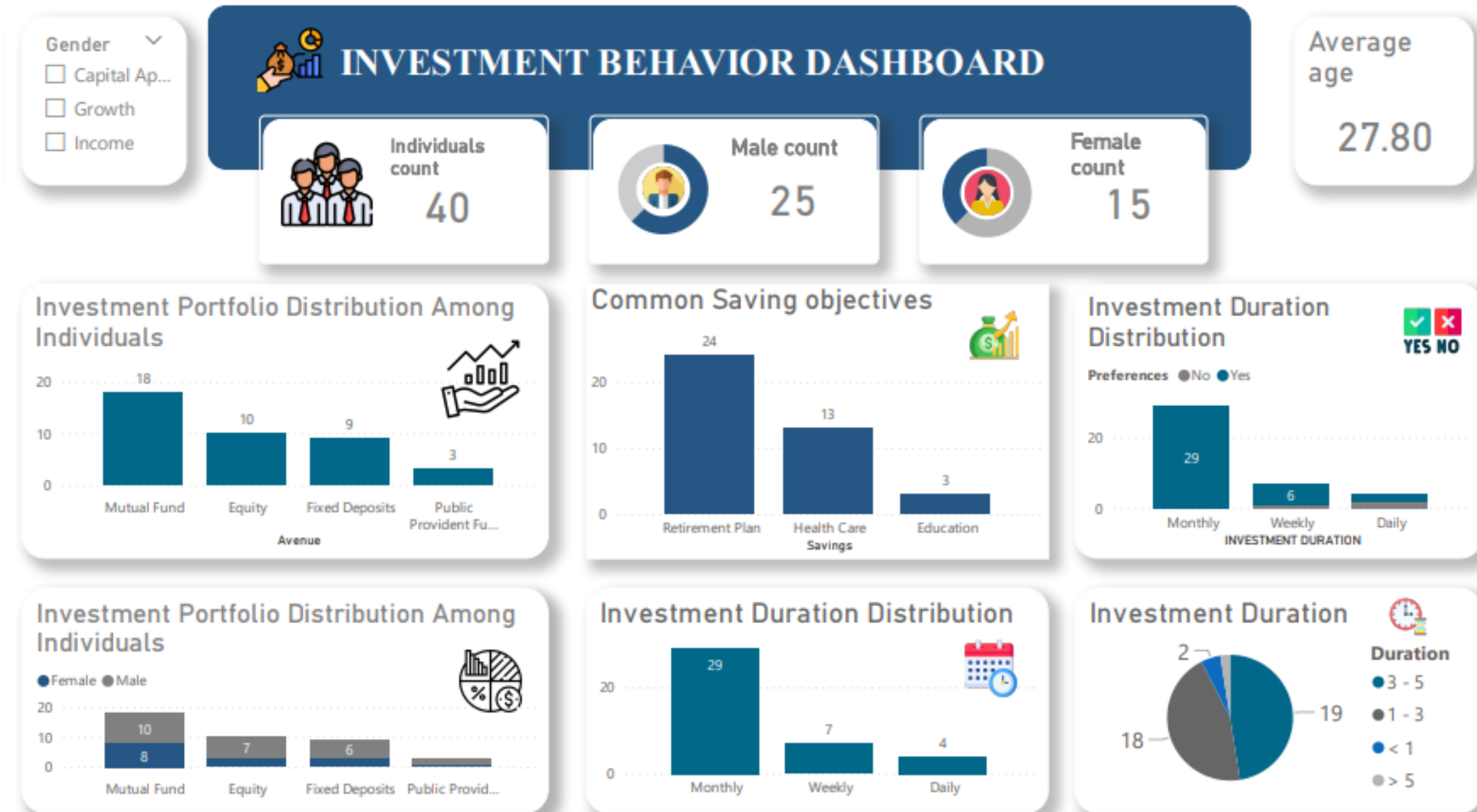
## OBJECTIVE

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.

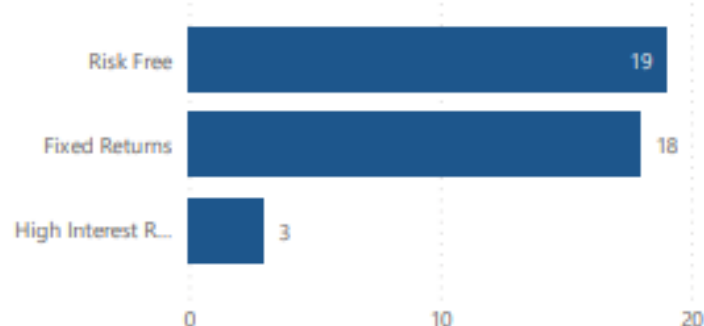
# STEP 1 : Dashboard Design: Design an intuitive dashboard layout in Power BI.



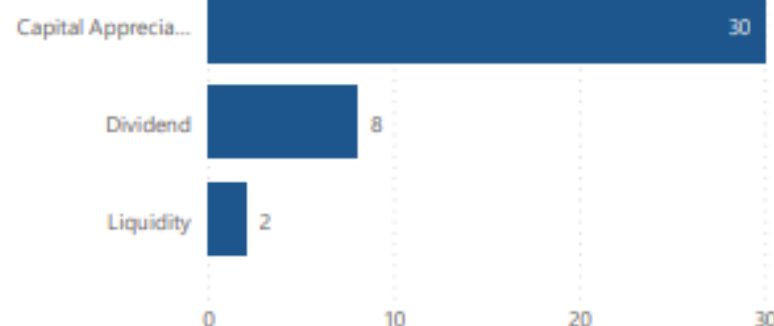


## INVESTMENT BEHAVIOR DASHBOARD

### Factors Influencing Fixed Deposit Investments



### Factors Influencing Equity Investments



Gender

☐ No

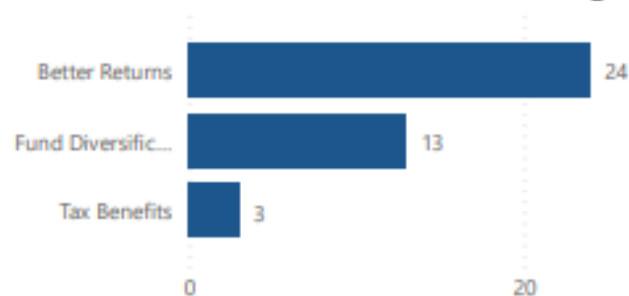
☐ Yes

Gender

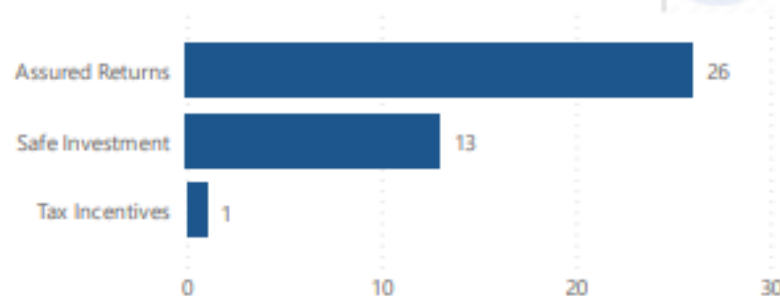
☐ Female

☐ Male

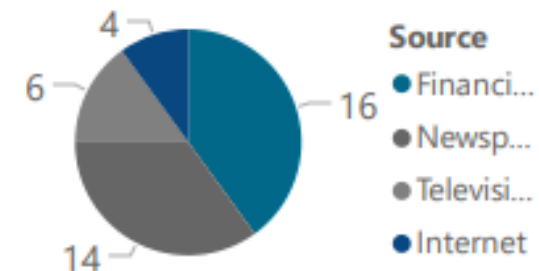
### Factors Influencing Mutual Fund Investments



### Factors Influencing Public provident Investments



### Source of Investment Information



## **STEP 2 : Incorporate Insights: Include visualizations from all previous analyses in the dashboard.**

### **INSIGHTS**

- 1.The distribution of investment among individuals is found to be higher in mutual funds, followed by equity.
- 2.The investment distribution among individuals is observed to be higher in mutual funds, followed by equity, with the majority being male investors
- 3.The common saving objective among the individuals is the retirement plan.
- 4.Most of the individuals preferred monthly investments.
- 5.Most individuals had an investment duration of 3 to 5 years.

## STEP 3 : Interactivity: Add interactive elements for exploring the data further.

Gender ▾

- ☐ Capital Ap...
- ☐ Growth
- ☐ Income

Gender ▾

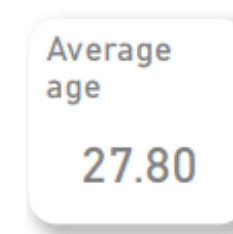
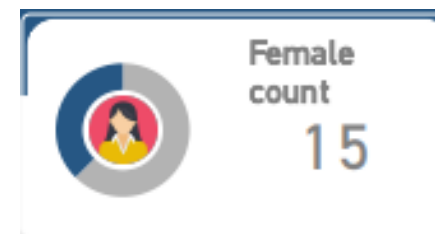
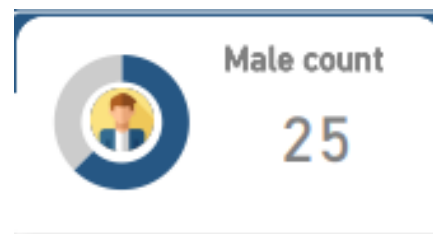
- ☐ No
- ☐ Yes

Gender ▾

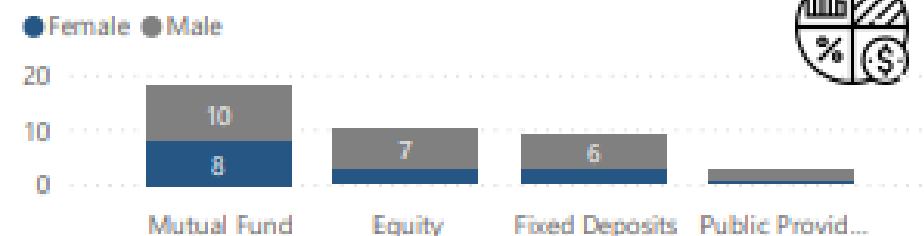
- ☐ Female
- ☐ Male

Source of Investment

# STEP 4: Key Findings: Summarize major insights derived from the analysis.

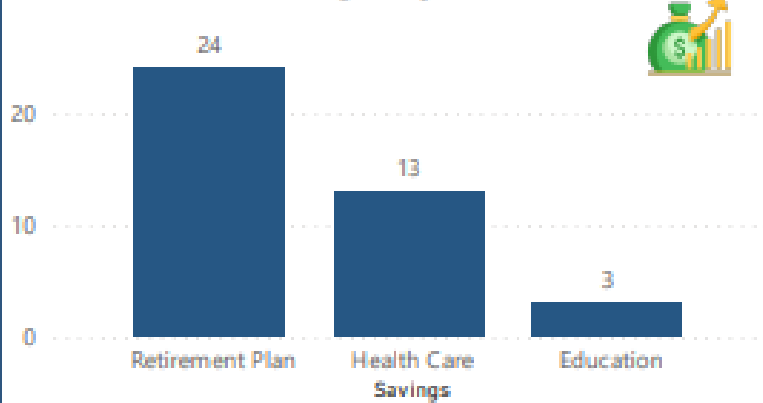


## Investment Portfolio Distribution Among Individuals



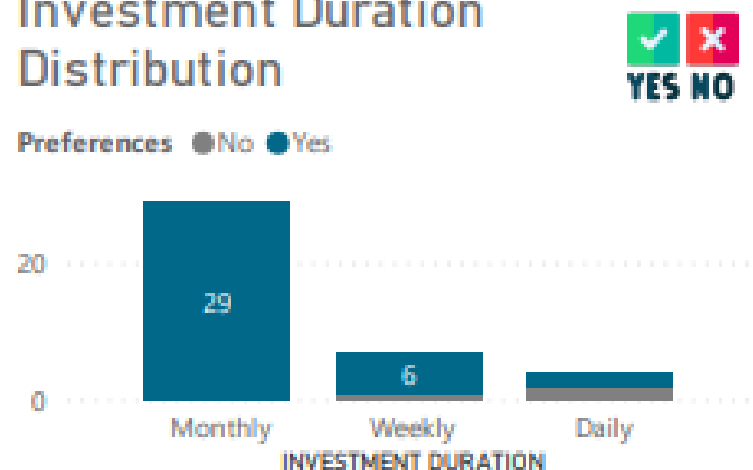
1.The distribution of investment among individuals is found to be higher in mutual funds, followed by equity and the majority are the male investors.

### Common Saving objectives



1. The common saving objective among the individuals is the retirement plan.

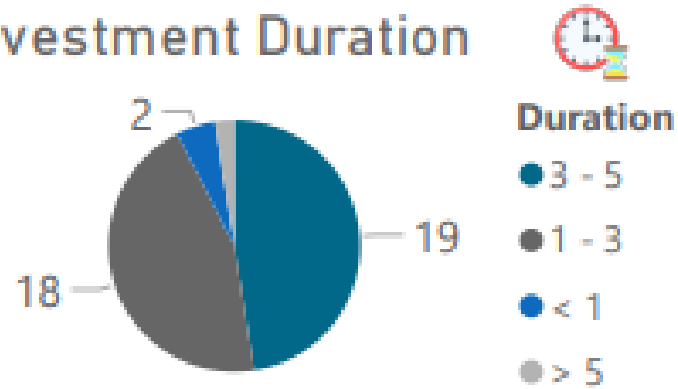
### Investment Duration Distribution



Monthly investments are highly chosen and preferred, receiving a favorable response

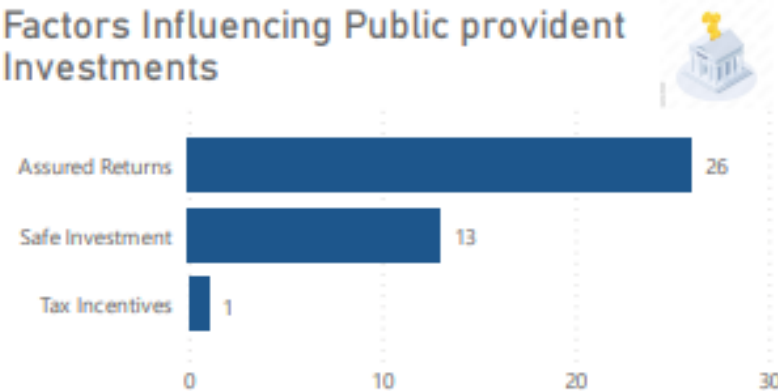


### Investment Duration



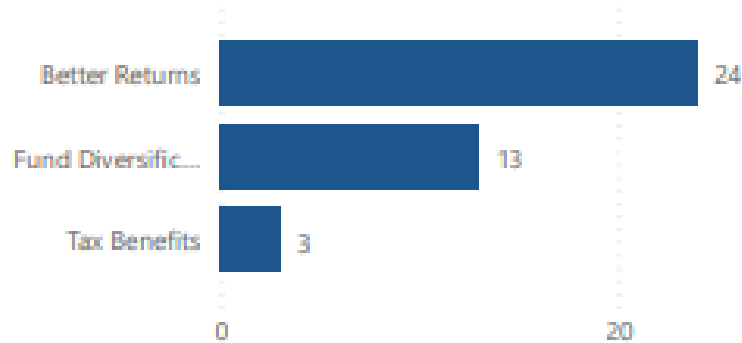
Most individuals had an investment duration of 3 to 5 years.

### Factors Influencing Public provident Investments



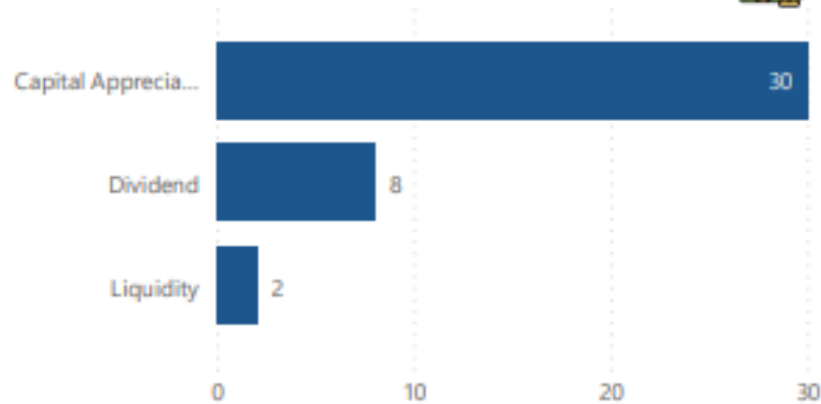
Individuals opt for public provident as an investment due to the perceived majority belief that they provide Assured returns

### Factors Influencing Mutual Fund Investments



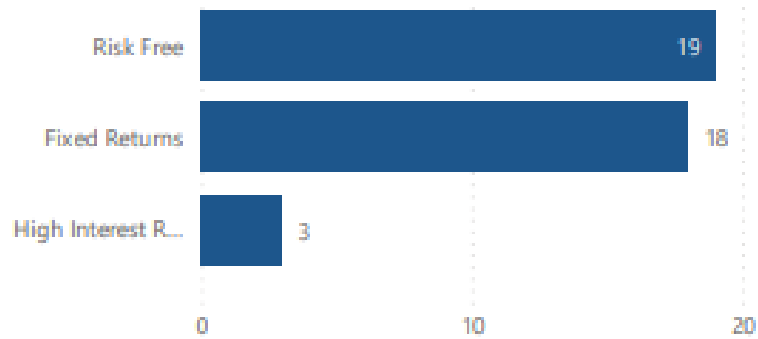
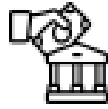
Individuals opt for mutual funds as an investment due to the perceived majority belief that they give better returns

### Factors Influencing Equity Investments



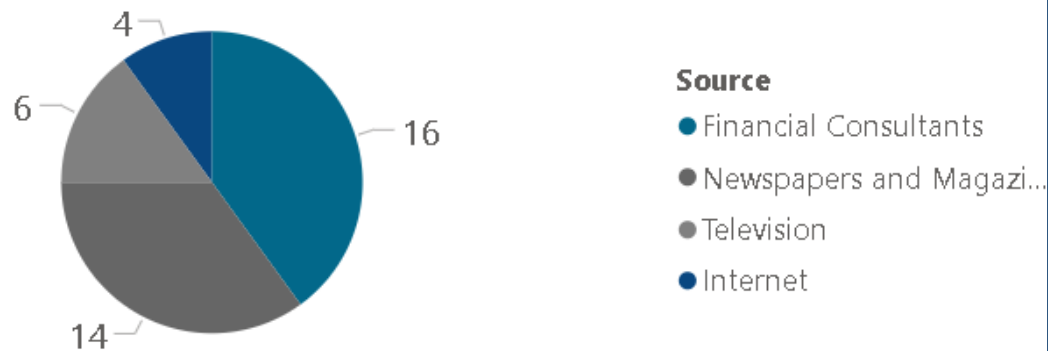
Individuals opt for equity as an investment due to the perceived majority belief that they have capital appreciation

### Factors Influencing Fixed Deposit Investments



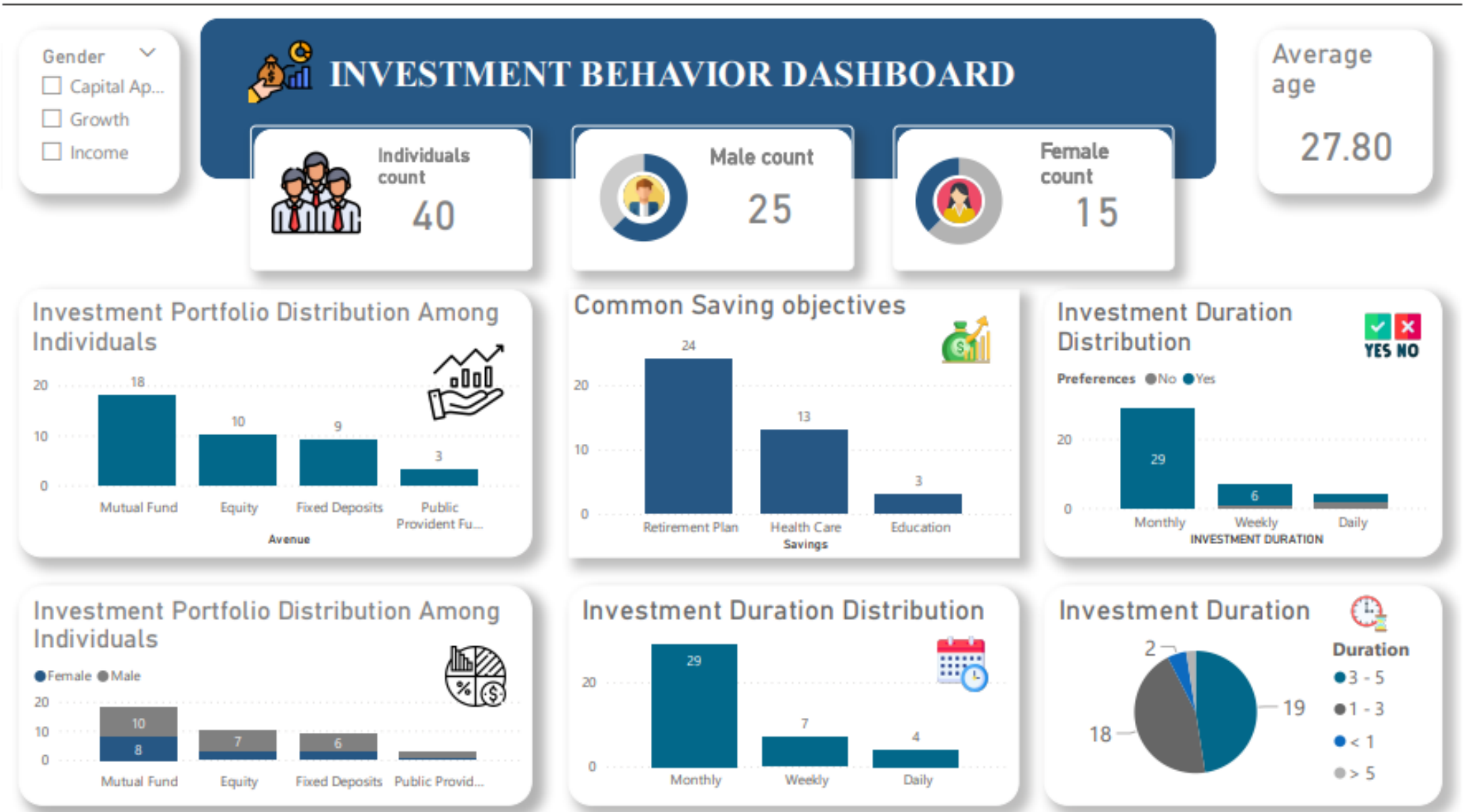
Individuals opt for fixed deposit as an investment due to the perceived majority belief that they are risk free

### SOURCE OF INVESTMENT INFORMATION



The primary source of investment information was mostly from financial consultants followed by newspaper and magazines

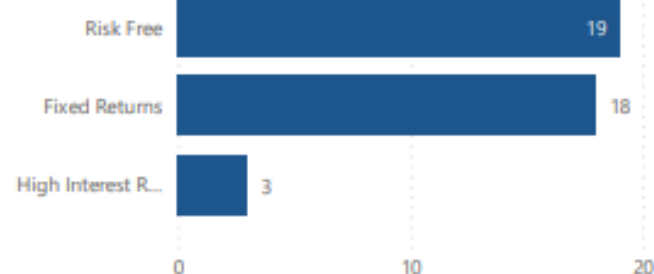
# STEP 5: Finalization: Polish the dashboard for a professional appearance and user-friendly experience.



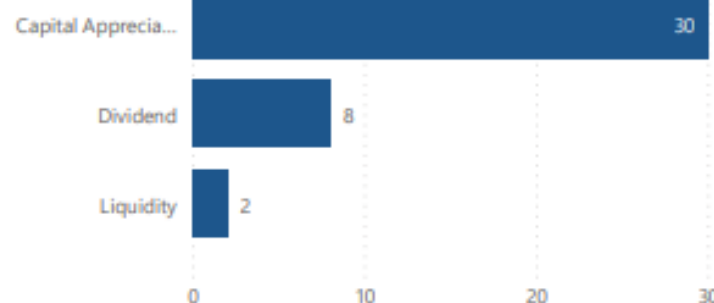


## INVESTMENT BEHAVIOR DASHBOARD

### Factors Influencing Fixed Deposit Investments



### Factors Influencing Equity Investments



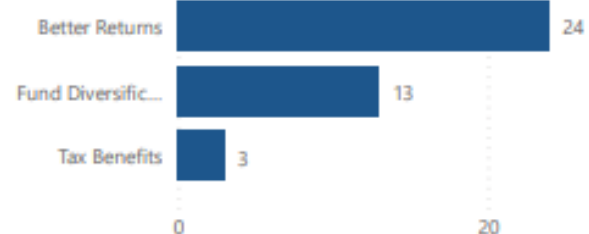
Gender

- ☐ No  
☐ Yes

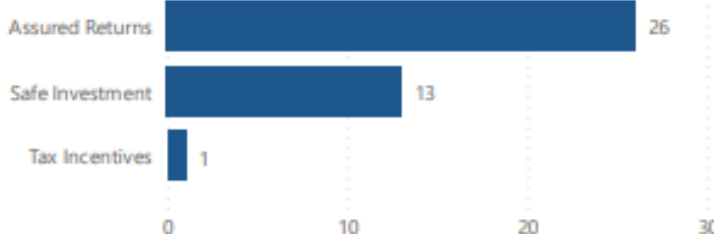
Gender

- ☐ Female  
☐ Male

### Factors Influencing Mutual Fund Investments



### Factors Influencing Public provident Investments



### Source of Investment Information

