Power BI Dashboard for Fidelity Investments

1. Data Source and Import

The data was sourced from the Excel file shared by Fidelity containing three sheets:
- Customer_Data: Demographic and account-level information for each customer.
- Portfolio_Data: Details on asset types, values, ROI, and risk levels.
- Transactions: Historical transaction data including amounts and dates.

Using Power BI Desktop, each sheet was imported individually. Relationships were established using the common field Customer_ID across all three tables to ensure data integration.

2. Data Modeling and DAX Measures

Each column's data type was verified and corrected as needed
Below DAX measures were created:
- Total Portfolio Value = SUM(Portfolio_Data[Current_Value])
- Total Transactions = SUM(Transactions[Amount])
- Average ROI = AVERAGE(Portfolio_Data[ROI])
- Count of Customers = DISTINCTCOUNT(Customer_Data[Customer_ID])

3. Dashboard Layout and Visualizations

The dashboard was designed on a single page to be clean and focused. The Fidelity logo and brand colors were applied to maintain corporate visual identity.

Key Visuals Included:
- KPI Cards: Show overall totals and averages for high-level insight.
- Bar Chart (Asset Type): Helps compare investment distribution across Stocks, Bonds, ETFs, etc.
- Line Chart (Transaction Trends): Visualizes transaction patterns over time for seasonality or spikes.
- Bar Chart (Age Group): Understands the age distribution of customers.
- Pie Chart (Location): Visualizes the geographic spread of customers.
- Table (ROI by Asset Type): Allows asset-type performance comparison with both value and ROI.
- Top 5 Customers: Highlights most valuable customers by portfolio size.

Slicers for Location, Risk Tolerance, and Date help users dynamically filter and explore the dataset.

The chosen metrics provide a complete snapshot of Fidelity's customer portfolio performance:

- Portfolio Value and ROI: Measure overall investment strength and effectiveness.
- Transaction Totals and Trends: Show user engagement and fund movement.
- Customer Demographics: Age and location distributions help understand the customer base.
- Asset Type Comparison: Helps assess investment strategies and risk diversification.
- Top Customers: Supports targeting and personalized service for high-value clients.