Customer & Portfolio Overview Dashboard

The primary goal of the Customer & Portfolio Overview Dashboard is to provide an at-a-glance understanding of customer demographics, investment distribution, risk tolerance, and performance metrics to support decision-making and strategic planning.

1. **Total Customers, Average ROI, Total Portfolio Value (KPI Cards)**
   These metrics serve as high-level summary indicators.
2. **Portfolio Value by Asset Type (Horizontal Bar Chart)**
   Displays the total value of customer investments broken down by asset type
3. **Customers by Account Type (Donut Chart)**
   Shows the split between Investment and Retirement accounts.
4. **Portfolio Value by Location (Treemap)**
   Represents the value of portfolios across different U.S. states.
5. **Portfolio Value by Asset Type and Risk Level (Stacked Column Chart)**
   Breaks down the portfolio value by both asset type and associated risk levels
6. **Customer Detail Table**
   Includes Customer_ID, Sum of ROI, Risk_Level, and Sum of Current_Value.
7. **Customers by Age Group (Bar Chart)**
   Segments customers into <30, 30-50, and >50 age groups.
8. **Slicers**
   Location, Risk Tolerance, Account Type, Asset Type, Risk Level.

Transaction & Customer Behavior Analysis

The primary goal of the Transaction & Customer Behavior Analysis Dashboard is to provide a clear, interactive view of customer transaction behavior, financial volume, and trends over time to support performance monitoring and strategic insights.

1. **Total Transactions, Sum of Amount, Average Transaction Value (KPI Cards)**
   These metrics serve as top-level summary indicators to show how active the customer base is, the total value transacted, and the typical size of each transaction.
2. **Transaction Trend (Line Chart)**
   Displays the monthly trend of total transactions throughout 2024.
3. **Transaction Type by Month (Clustered Bar Chart)**
   Shows the number of Buy vs. Sell transactions broken down month-by-month.
4. **Transactions by Type (Pie Chart)**
   Shows the overall percentage of Buy vs. Sell transactions.

5. **Customer Transaction Summary Table (Table)**
   Includes Customer_ID, Sum of Amount, and Earliest Transaction Date.
6. **Slicers**
   Location, Risk Tolerance, Transaction Type, Account Type, Date Range.