A screenshot of a chart

AI-generated content may be incorrect.

*Table 1: Summary Statistics of Personality Traits*

We found that risk tolerance is the most stable trait (range: 0.299–0.745; low dispersion), confirming its reliability for client profiling. In contrast, impact desire and impulsivity exhibit extreme variability (0.005–0.997 ranges with high standard deviations), necessitating client-specific calibration. All traits demonstrate balanced mean values (~0.5), indicating a representative sample suitable for generalised behavioural modelling.

A screenshot of a graph

AI-generated content may be incorrect.

Table 2: Correlation Metrix for Traits

The correlation analysis reveals a near-perfect positive relationship between risk tolerance and confidence (r\* = 0.92), indicating that risk-tolerant clients inherently exhibit higher self-assurance, reducing the need for additional confidence-building interventions. Conversely, composure shows only moderate association with confidence (r\* = 0.53) and negligible linkage to impact desire (r\* = 0.034), demonstrating its independence from achievement motivation—a critical insight for targeted behavioral modeling.

A graph of value in gbp

AI-generated content may be incorrect.

Histogram 1: Assets Allocation

This chart shows Crypto (£46,619) emerges as the overwhelming leader, more than Equities (£23,660) and Bonds (£21,939) combined. Real Estate (£16,246) and Commodities (£13,557) trail significantly, while Cash (£13,295) shows clients maintain minimal liquidity reserves.

**Data Integration & Methodology:**

The combined dataset merges everyone’s total GBP-denominated assets with their personality traits, enabling comprehensive behavioural finance analysis. 2 key visualisations reveal critical insights:

A screenshot of a computer

AI-generated content may be incorrect.

**Vis 1: Top 5 Client Asset Allocation**

The table highlights the top 5 asset allocations converted to GBP, showcasing a diverse range of investments including Bonds, Crypto, Real Estate, Cash, Equities, and Commodities. The highest values are associated with Bonds and Crypto, indicating a strong preference for these asset classes among the top entries. Notably, the values vary significantly across different currencies, with some assets like JPY and AUD being converted to GBP, reflecting the global nature of the portfolio. The consistent confidence, risk tolerance, and other psychological scores (e.g., composite, impulsivity) suggest a uniform evaluation framework applied across these assets. This data could be used to analyse investment trends, risk distribution, or the impact of currency fluctuations on portfolio value.

Vis 2: Risk Tolerance Vs. Asset Preference

A graph of different colored squares

AI-generated content may be incorrect.

**Vis 2: Boxplot of Personality Outlier**

We found that risk tolerance is the only trait with notable outliers, identifying a distinct high-risk client segment, while impact desire and impulsivity show unexpectedly tight clustering despite their theoretical ranges, suggesting natural behavioural boundaries in financial decision-makers. Composure and confidence exhibit balanced distributions, making them reliable segmentation variables.