

## Mutual Fund Analysis

The analysis should focus on

### Objectives

- Analyze a dataset and obtain data-driven actionable insights using either Power BI
- Include navigation buttons or a page navigator that moves the user from one page to the next.
- Create multiple pages and use the same color (light blue and white) White for the background so it is easy on the eye.
- Use slicers so it is easy to see what is going on.
- Find the avg for each year
- What is the standard deviation for each return?
- Where is the marketing heading?
- Where is the marketing heading?
- Pick your 5 you recommend. See the attached photo
- 2 you recommend.

### PRESENTATION ASSIGNMENT SCENARIO

You are currently employed as an associate at a financial advising firm. Five minutes ago, Jenny, who is a managing director at the firm, visited with you about new clients that solicited advice. The clients are Jane and Tom. They reached out to your firm, because they have not been financially frugal for most of their lives. Recently, Jane convinced Tom to sell several of his toys and start thinking about retirement. As you and Jenny talk about Tom and Jane's financial situation, you learn that Tom works as an assistant manager at a local grocery store. He is 45 years old and is happily married to Jane who is age 42. Jane works part time for a local dentist. Both individuals are educated and have bachelor's degrees. They also have five children (ages 2 to 20).

Six months ago, Jane and Tom spoke with a close friend who helped them get their spending under control. They currently budget their finances and are living within their means. They are now focused on preparing for retirement since they only have \$25,000 saved thus far. Incidentally, although Tom and Jane are not mutual fund experts, both of them are familiar with mutual funds and eager to build up their savings. When they contacted Jenny, they had one primary question that needed to be answered. It was this: "What funds do you recommend we invest in to prepare for retirement?"

After a brief discussion about Tom and Jane, Jenny told you that you would be responsible for conducting the fund analysis and putting together a presentation for the couple. She also said, "Although there are a lot of directions you could go with this, I recommend that you address the following three points:

1. Discuss the **direction the market will head over the next year given the market** volatility we have seen post COVID-19;
2. **Present five key fund categories that you believe have high potential;** and
3. **Recommend two Mutual Funds / ETFs** within each of **the five fund categories** that Tom and Jane could invest in. You are allowed to recommend two mutual funds or two ETFs or one of each for each of the five fund categories."