ISSN (Online): 2455-3662
EPRA International Journal of Multidisciplinary Research (IJMR) - Peer Reviewed Journal
Volume: 11| Issue: 4| April 2025|| Journal DOI: 10.36713/epra2013 || SJIF Impact Factor 2025: 8.691 || ISI Value: 1.188

AN INVESTIGATION OF MUTUAL FUNDS AND GOLD PERFORMANCE TRENDS USES POWER BI

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ABSTRACT

Through this research paper, we analyse mutual fund and gold price performance by using Power BI Visualization tools. The Financial Market remains in continuous motion because investors actively research for ways to improve their investment portfolios. An Investigation analyses mutual fund and gold price history to discover patterns together with relational data and suitable investment approaches. The study uses Power BI analytical tools to create interactive dashboards that provide data-based investment choices.

Power BI enables users to visualize business intelligence data effectively while providing meaningful insights from extensive datasets. Power BI serves as the fundamental investigation area regarding its ability to convert complex financial data into simple analysis products for investors with varying proficiency capabilities. Through its interactive display features, Power BI allows users to discover market instability patterns and risk evaluation criteria as well as financial trend assessments using graphs and statistical tools.

INTRODUCTION

Investors must decide between different investment categories that provide stable returns alongside risk-reduction benefits. Mutual fund investments provide spread-out risks, and gold maintains its status as a risk-reducing asset. Previous performance indicators help investors make better investment choices. Power BI's visualization tools empower investors to analyse complex financial data with ease, even without specialized expertise. This research analyses mutual fund financial patterns alongside gold patterns to study their market behaviour alongside risk and return variables indicators.

A mutual fund combines many investors' funds in a professional management structure, which then enables investments across different assets such as stocks, bonds, and other securities. The different types of mutual funds' assets investors identified using three primary categories: equity, debt and hybrid and index funds. Mutual fund investors choose funds based on their financial goals, risk tolerance, and expected returns. People have used gold as a protection against both inflation and unpredictable economic situations due to its historical standing. When financial crises occur, markets typically drive-up gold prices as investors view this metal as a valuable choice for such turbulent periods.

More organizations depend on data-based investment choices, so they require better analytical tools. The traditional method of investment research depends mainly on static report presentations and statistical models but delivers information that might be difficult to understand. Power BI represents complex financial data through interactive dashboards, enabling users to better understand information and make more informed decisions.

RESEARCH GAP

Many investigations focus on mutual funds and gold investments, yet there is limited research regarding the use of Power BI for financial field trend analysis. Financial research primarily depends on statistical models instead of using interactive visual representation according to traditional practices. Data analytics meets visualization through Power BI which delivers improved insights according to the finding of this paper.

Existing financial analysis mostly deals with static numerical data graphs, which need expert interpretation to derive meaning. Power BI integration provides real-time data updates, allowing investors to monitor trends as they evolve. The current research shows how Power BI enables dynamic market analysis through its financial tools, which overcome previous analytical gaps. The analysis of mutual fund and gold performance appears separately in research studies, yet most literature avoids describing their connection through an integrated investment approach.

OBJECTIVE

The main purpose of this research involves studying mutual fund and gold price developments through Power BI. Specific Goals Include:

- Examining historical trends and statistical relationships between mutual fund investments and gold holdings.
- Assessing investment options by evaluating the risk-to-return ratio to support informed decision-making.
- Demonstrated the capabilities of Power BI in effectively visualizing financial data.
- Analysing investor behaviour in response to market fluctuations and economic cycles.

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- Exploring the combined use of mutual funds and gold as an investment strategy to enhance financial stability.

METHODOLOGY

The research methodology incorporates a numerical data collection method for analysis.

- Historical price data on mutual funds and gold will be collected from credible financial sources, including financial institutions, stock exchanges, and economic reports.
- The data-cleaning process ensures accuracy by improving data quality through anomaly removal, value correction, and dataset normalization for reliable performance comparisons.
- Power BI is utilized to create interactive dashboards that visualize trends, performance evaluations, and correlations using line charts, bar graphs, scatter plots, and pie charts.
- The evaluation assesses key performance indicators such as returns, volatility, and risk adjusted returns in relation to market fluctuations.
- Statistical trend analysis is conducted using moving averages, standard deviations, and correlation coefficient analysis through various statistical models.
- Visualised insights help derive conclusions that guide investors in optimizing their asset allocation strategies based on observed trends.

RESULTS

The financial data presented in Power BI visualizations shows trends as follows:

- Long term growth in mutual funds appears stable while markets apply periodic volatility to fund performance. Equity mutual funds deliver higher returns accompanied by enhanced volatility while debts funds provide stable performance at moderate level of returns
- Investors should consider gold investments when they want to protect their portfolios from stock market volatility because the two financial instruments move in opposite directions. The price of gold increases when stock markets collapse thus making it a resilient investment for financial instability.
- Investors can achieve optimal returns by diversifying across classes, as this leads to better risk adjusted outcomes.
- Combining mutual fund investments with gold enhances financial stability, especially during periods of market volatility.
- Power BI provides real time interactive performance insights, allowing investors to monitor their assets make informed decisions.
- Users benefit from dynamic dashboards that enable time-based data filtering, fund comparisons, and tracking gold prices reactions to global events.
- This research examines how mutual fund and gold investments exhibit periodic trends across the year. The investment decisions of investors become influenced by gold prices movements which reach peak levels during national festivities and weeding events across particular countries.

CONCLUSION

The study shows how Power BI efficiently displays financial trends that enable investors to understand mutual fund and gold investment performance better. This research highlights the importance of data driven decision making policies and demonstrates how dynamic visual displays enhance investment strategy development. Power BI delivers real-time updates for large datasets which enables investors and financial analysts to find it an essential tool for their work.

The combination of appropriate mutual funds investments alongside gold produces an effective risk reduction strategy which enhances financial outcomes. Mutual fund investment create expansion but physical gold serves as an asset protection when market volatilities occur.

Future research should explore cryptocurrency investments, real estate, and bonds using predictive analytics to anticipate financial market trends. Additionally, enhancing Power BI's analytics capabilities with AI technology could further improve financial decision making.

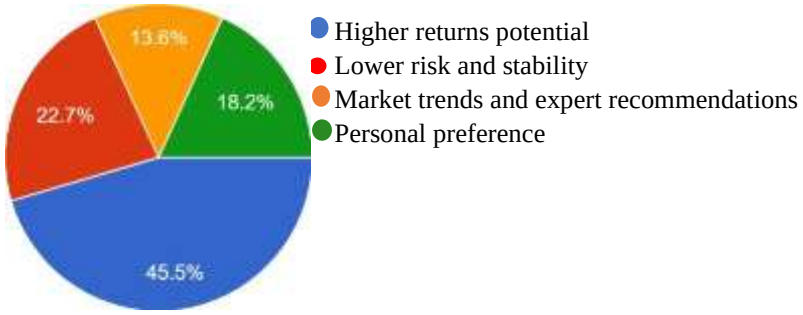
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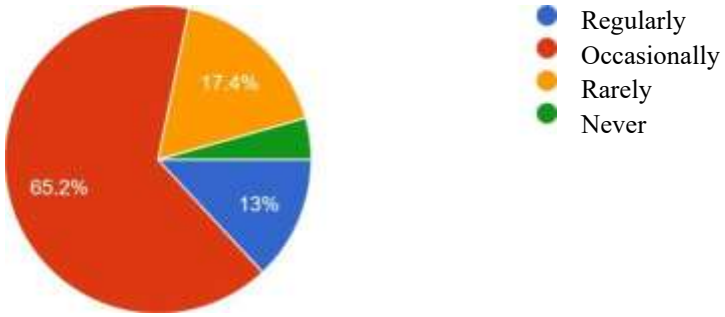
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"Visual Representation of Investor Preferences and Investment Trends"

What is your primary reason for choosing either mutual funds or gold



How often do you analyze financial trends using visualization tools like Power Bl



Which investment option do you believe provides better long-term returns

