

Dashboarding

Fund Summary Reports

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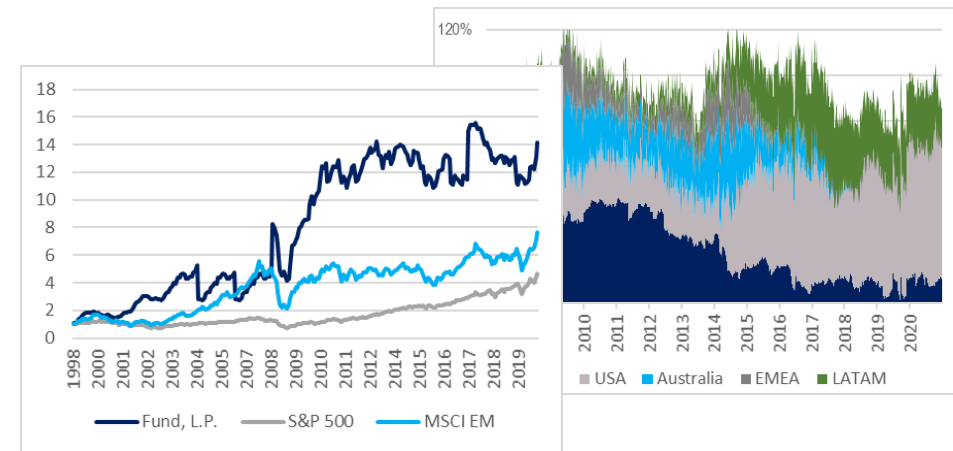
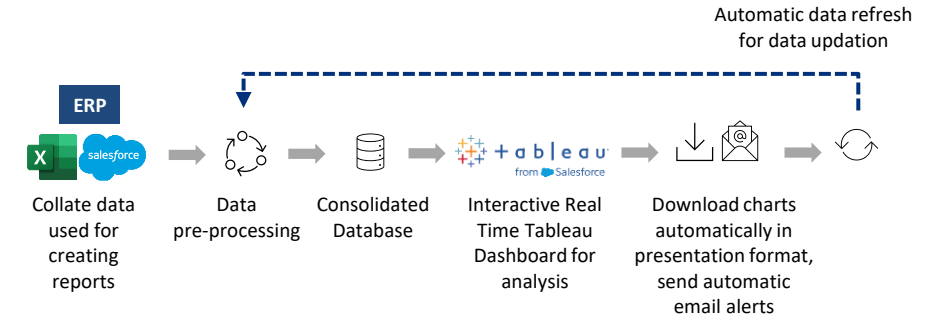
Request and Guidelines Provided

- Consolidate, Standardize and Store the data from multiple sources (ERP, Salesforce, Excel, etc.) through APIs into a database
- Develop a data-pipeline by applying business logic to generate IRR to keep the investors updated with their investments
 - Generate daily reports for internal tracking and monthly reports for sharing with investors

Methodology and Final Deliverable

- **Sourcing:** ETL process was designed in Python to consolidate and standardize the data from multiple sources using APIs into database
- **Storage:** MySQL database was created by designing Data Models to store raw data
- **Governance:** Data quality checks were performed during sourcing and data lineage was maintained
- **Engineering:** Built data pipelines by applying business logics and re-shaped the data for Tableau Input
- **Analysis & Reporting:** Periodic automated Tableau reports were generated in specified format for internal tracking and sharing with investors

Output Snapshot



Better reporting helped build stronger relationships with investors and ultimately attract more capital



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