

## **Executive Summary**

To assist with client's long-term investing plans, the project's purpose is to better understand their financial investment preferences in the form of term deposits and mutual funds, among other things. Income securities that have a low degree of risk, but a greater rate of return than the principle is invested in is what I am talking about. Banks and other financial organisations provide investment options that span a broad variety of financial entities. The report is expected to benefit investors in two ways: first, it will tell investors which instruments to invest in to help mitigate the risk of losing money while also increasing the return on the money invested; and second, investors will profit because the report will provide information on which instruments to invest in in order to reduce the threat of losing money while also increasing the return on the money invested. Through extensive research, this study examines a wide range of financial institutions, and investors will be able to make the best possible investment selection as a result. A questionnaire was given to fifty random participants so that they may answer questions and supply the information required for the study. Analyzing the data gathered during primary research was important in order to perform descriptive and correlation analyses, as well as visualisations, as well as other statistical analyses like hypothesis testing in order to fulfil the aims mentioned in the study. As a secondary research study, an academic review of past works was used to confirm the results of the original research. Conclusion: on the basis of study, the results showed that customers know Mahindra makes excellent products, and the possibility of investment preference is also noteworthy, as shown by the survey results.