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BFSI KPI Dashboard

Banking, Finance & Fintech

Document type: Plan / SOP / strategy / guide · Generated 29 Aug 2026

This guide explains what the tool produces, how to use the output, and what to watch for. The actual output (draft/report) is generated on the tool page.

Background

Defines a practical KPI set and review cadence for a financial-services business — for each KPI, the formula, why it matters and a benchmark hint — covering the metrics that actually run the business (AUM or loan book, disbursals, NPA %, persistence, revenue per client, CAC, cost-to-income, retention). Use this to build a dashboard. Set targets from your own history.

Purpose of this tool & output

Track the metrics that run the business

How the output is used

Use the dashboard to track the metrics that run the business — AUM, persistency, conversion and compliance.

Important cautions

AI-generated framework; set targets from your history.

Companion documents

- BFSI Business Plan Builder
- BFSI Business P&L Builder
- BFSI GST & Tax Guide
- Commission Reconciliation Tool
- BFSI Business Case / Loan Note
- Fee & Pricing Strategy

This is AI-assisted guidance. Verify with a qualified professional before any binding decision. Fees, authorities and processes vary by state and change over time — confirm with your state authority.