CAPSTONE PROJECT

FINANCIAL PERFORMANCE ANALYSIS
A CASE STUDY ON PROFITABILITY AND SALES TRENDS IN WESTERN ECONOMIES

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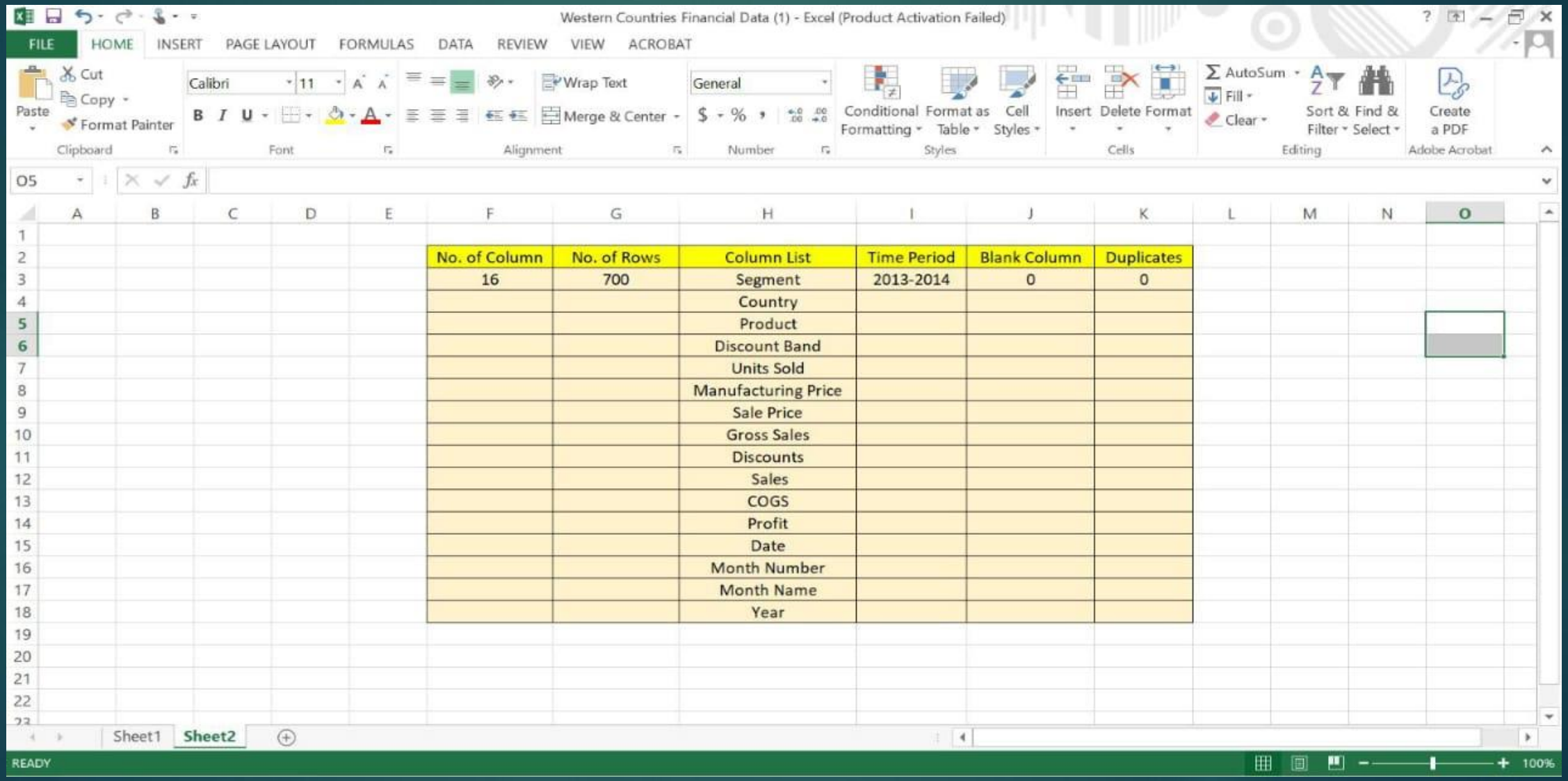
Explore the data using Excel, understand the data and prepare a short summary about the dataset.

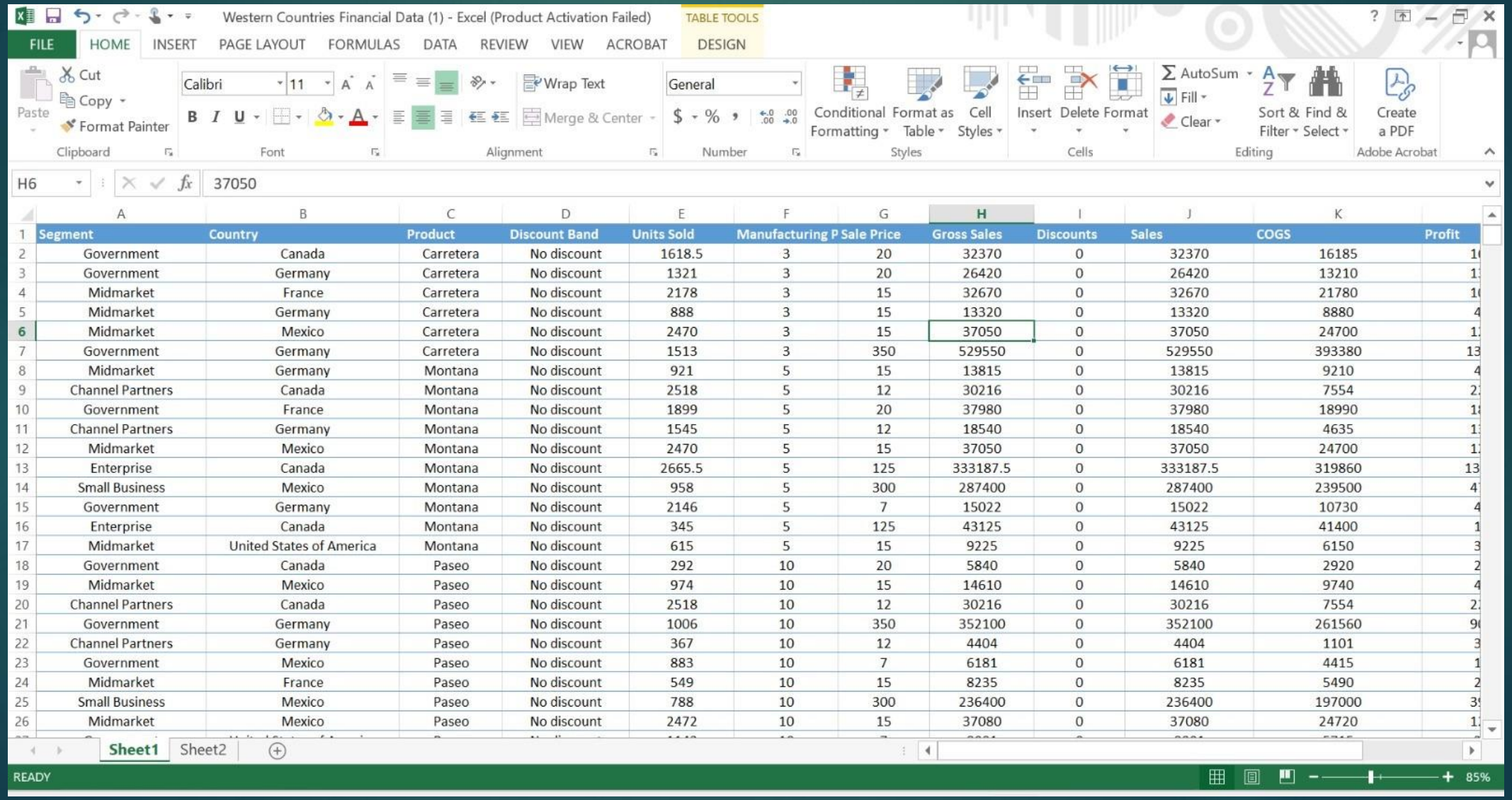
This dataset shows product sales in different countries for the year 2013-2014. It includes details like segments, product name, unit sold, sales price, and profit. It helps track how much was sold, how much it cost to make, and the profit earned. Each row is a sales transaction with its date and country. It can be used to analyze sales trends, performance, and probability.

EXPLORE THE DATA USING EXCEL, UNDERSTAND THE DATA AND PREPARE A SHORT SUMMARY ABOUT THE DATASET.



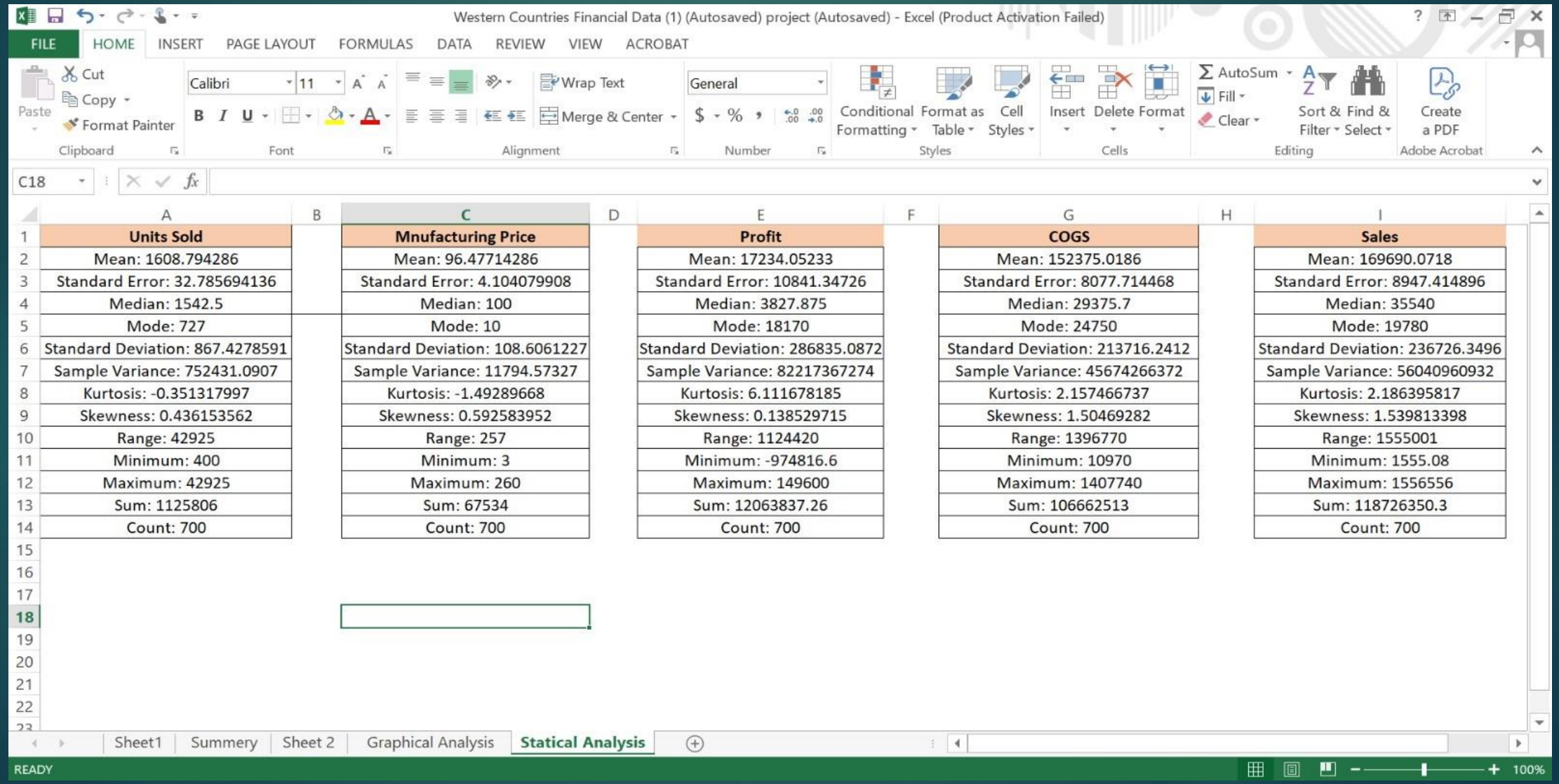
No. of Column	No. of Rows	Column List	Time Period	Blank Column	Duplicates
16	700	Segment	2013-2014	0	0
		Country			
		Product			
		Discount Band			
		Units Sold			
		Manufacturing Price			
		Sale Price			
		Gross Sales			
		Discounts			
		Sales			
		COGS			
		Profit			
		Date			
		Month Number			
		Month Name			
		Year			

PERFORM DATA CLEANING IF REQUIRED AND THEN DO STATISTICAL ANALYSIS ON DATA USING STATISTICAL TOOLS



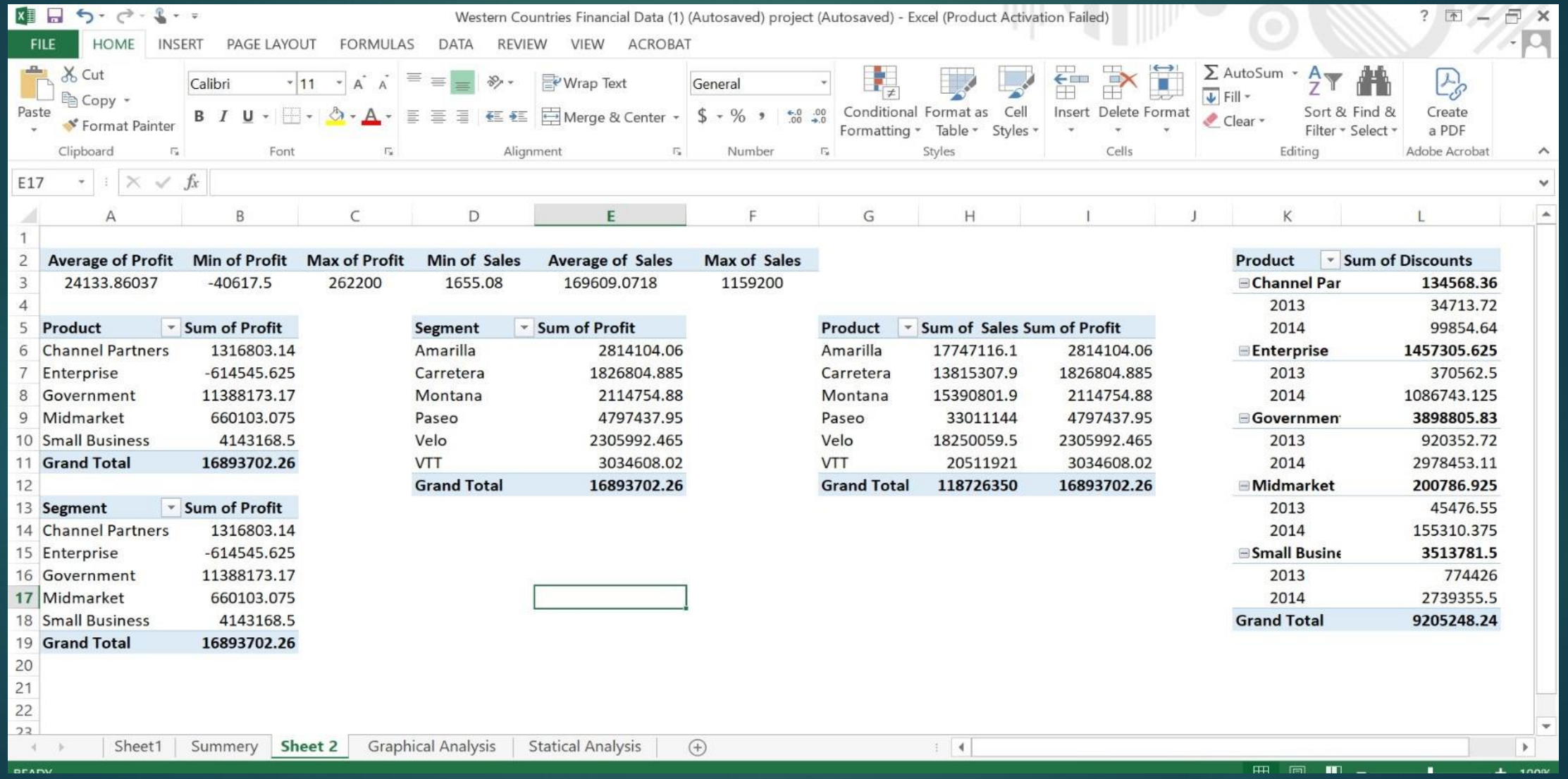
	A	B	C	D	E	F	G	H	I	J	K	
1	Segment	Country	Product	Discount Band	Units Sold	Manufacturing P	Sale Price	Gross Sales	Discounts	Sales	COGS	Profit
2	Government	Canada	Carretera	No discount	1618.5	3	20	32370	0	32370	16185	1(
3	Government	Germany	Carretera	No discount	1321	3	20	26420	0	26420	13210	1:
4	Midmarket	France	Carretera	No discount	2178	3	15	32670	0	32670	21780	1(
5	Midmarket	Germany	Carretera	No discount	888	3	15	13320	0	13320	8880	4
6	Midmarket	Mexico	Carretera	No discount	2470	3	15	37050	0	37050	24700	1:
7	Government	Germany	Carretera	No discount	1513	3	350	529550	0	529550	393380	13
8	Midmarket	Germany	Montana	No discount	921	5	15	13815	0	13815	9210	4
9	Channel Partners	Canada	Montana	No discount	2518	5	12	30216	0	30216	7554	2:
10	Government	France	Montana	No discount	1899	5	20	37980	0	37980	18990	1:
11	Channel Partners	Germany	Montana	No discount	1545	5	12	18540	0	18540	4635	1:
12	Midmarket	Mexico	Montana	No discount	2470	5	15	37050	0	37050	24700	1:
13	Enterprise	Canada	Montana	No discount	2665.5	5	125	333187.5	0	333187.5	319860	13
14	Small Business	Mexico	Montana	No discount	958	5	300	287400	0	287400	239500	4:
15	Government	Germany	Montana	No discount	2146	5	7	15022	0	15022	10730	4
16	Enterprise	Canada	Montana	No discount	345	5	125	43125	0	43125	41400	1
17	Midmarket	United States of America	Montana	No discount	615	5	15	9225	0	9225	6150	3
18	Government	Canada	Paseo	No discount	292	10	20	5840	0	5840	2920	2
19	Midmarket	Mexico	Paseo	No discount	974	10	15	14610	0	14610	9740	4
20	Channel Partners	Canada	Paseo	No discount	2518	10	12	30216	0	30216	7554	2:
21	Government	Germany	Paseo	No discount	1006	10	350	352100	0	352100	261560	9(
22	Channel Partners	Germany	Paseo	No discount	367	10	12	4404	0	4404	1101	3
23	Government	Mexico	Paseo	No discount	883	10	7	6181	0	6181	4415	1
24	Midmarket	France	Paseo	No discount	549	10	15	8235	0	8235	5490	2
25	Small Business	Mexico	Paseo	No discount	788	10	300	236400	0	236400	197000	3:
26	Midmarket	Mexico	Paseo	No discount	2472	10	15	37080	0	37080	24720	1:

PERFORM DATA CLEANING IF REQUIRED AND THEN DO STATISTICAL ANALYSIS ON DATA USING STATISTICAL TOOLS



	A	C	E	G	I
1	**Units Sold**	**Mnufacturing Price**	**Profit**	**COGS**	**Sales**
2	Mean: 1608.794286	Mean: 96.47714286	Mean: 17234.05233	Mean: 152375.0186	Mean: 169690.0718
3	Standard Error: 32.785694136	Standard Error: 4.104079908	Standard Error: 10841.34726	Standard Error: 8077.714468	Standard Error: 8947.414896
4	Median: 1542.5	Median: 100	Median: 3827.875	Median: 29375.7	Median: 35540
5	Mode: 727	Mode: 10	Mode: 18170	Mode: 24750	Mode: 19780
6	Standard Deviation: 867.4278591	Standard Deviation: 108.6061227	Standard Deviation: 286835.0872	Standard Deviation: 213716.2412	Standard Deviation: 236726.3496
7	Sample Variance: 752431.0907	Sample Variance: 11794.57327	Sample Variance: 82217367274	Sample Variance: 45674266372	Sample Variance: 56040960932
8	Kurtosis: -0.351317997	Kurtosis: -1.49289668	Kurtosis: 6.111678185	Kurtosis: 2.157466737	Kurtosis: 2.186395817
9	Skewness: 0.436153562	Skewness: 0.592583952	Skewness: 0.138529715	Skewness: 1.50469282	Skewness: 1.539813398
10	Range: 42925	Range: 257	Range: 1124420	Range: 1396770	Range: 1555001
11	Minimum: 400	Minimum: 3	Minimum: -974816.6	Minimum: 10970	Minimum: 1555.08
12	Maximum: 42925	Maximum: 260	Maximum: 149600	Maximum: 1407740	Maximum: 1556556
13	Sum: 1125806	Sum: 67534	Sum: 12063837.26	Sum: 106662513	Sum: 118726350.3
14	Count: 700	Count: 700	Count: 700	Count: 700	Count: 700

PERFORM DATA CLEANING IF REQUIRED AND THEN DO STATISTICAL ANALYSIS ON DATA USING STATISTICAL TOOLS.



Average of Profit	Min of Profit	Max of Profit	Min of Sales	Average of Sales	Max of Sales
24133.86037	-40617.5	262200	1655.08	169609.0718	1159200

Product	Sum of Profit
Channel Partners	1316803.14
Enterprise	-614545.625
Government	11388173.17
Midmarket	660103.075
Small Business	4143168.5
Grand Total	16893702.26

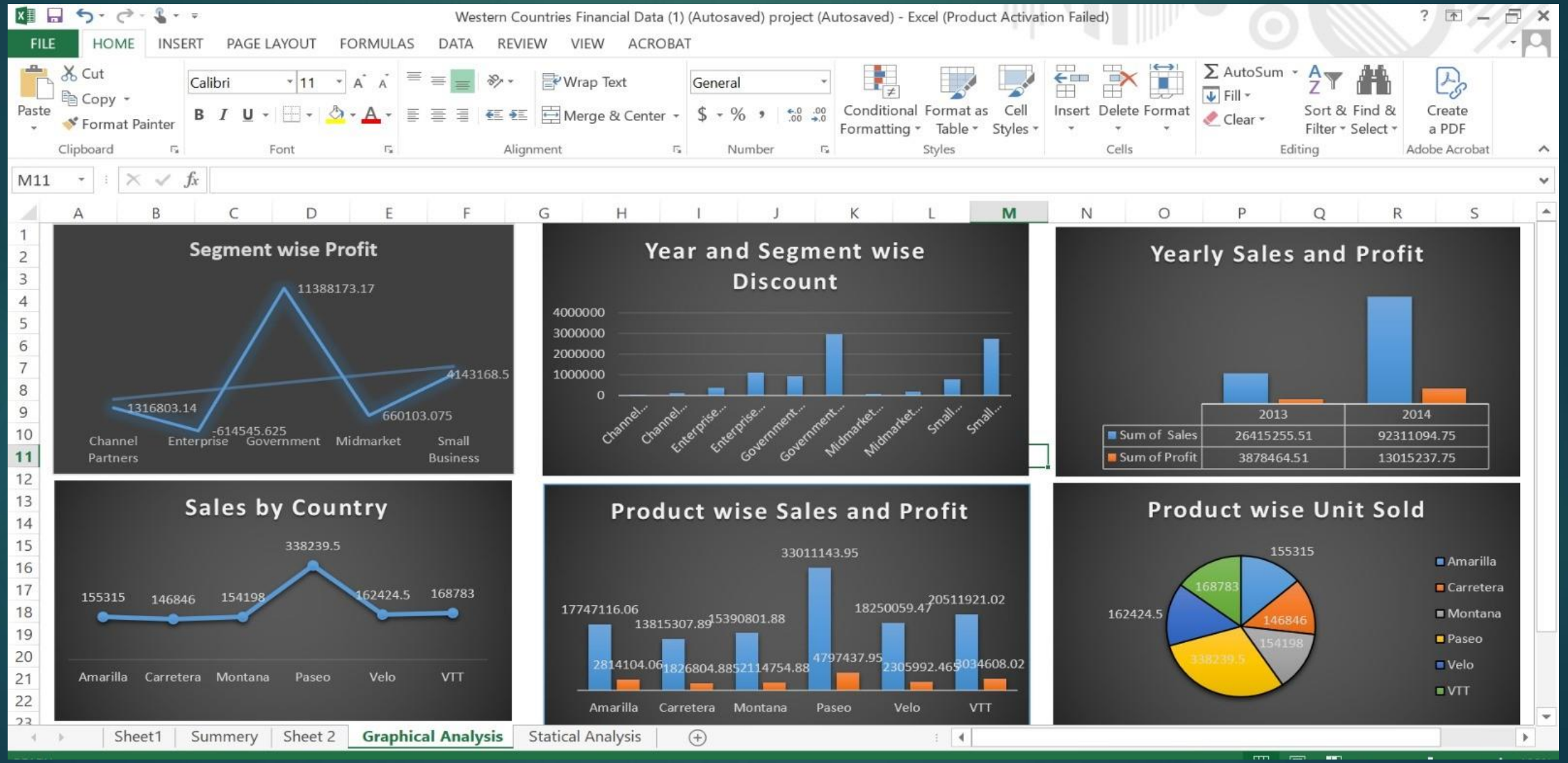
Segment	Sum of Profit
Channel Partners	1316803.14
Enterprise	-614545.625
Government	11388173.17
Midmarket	660103.075
Small Business	4143168.5
Grand Total	16893702.26

Segment	Sum of Profit
Amarilla	2814104.06
Carretera	1826804.885
Montana	2114754.88
Paseo	4797437.95
Velo	2305992.465
VTT	3034608.02
Grand Total	16893702.26

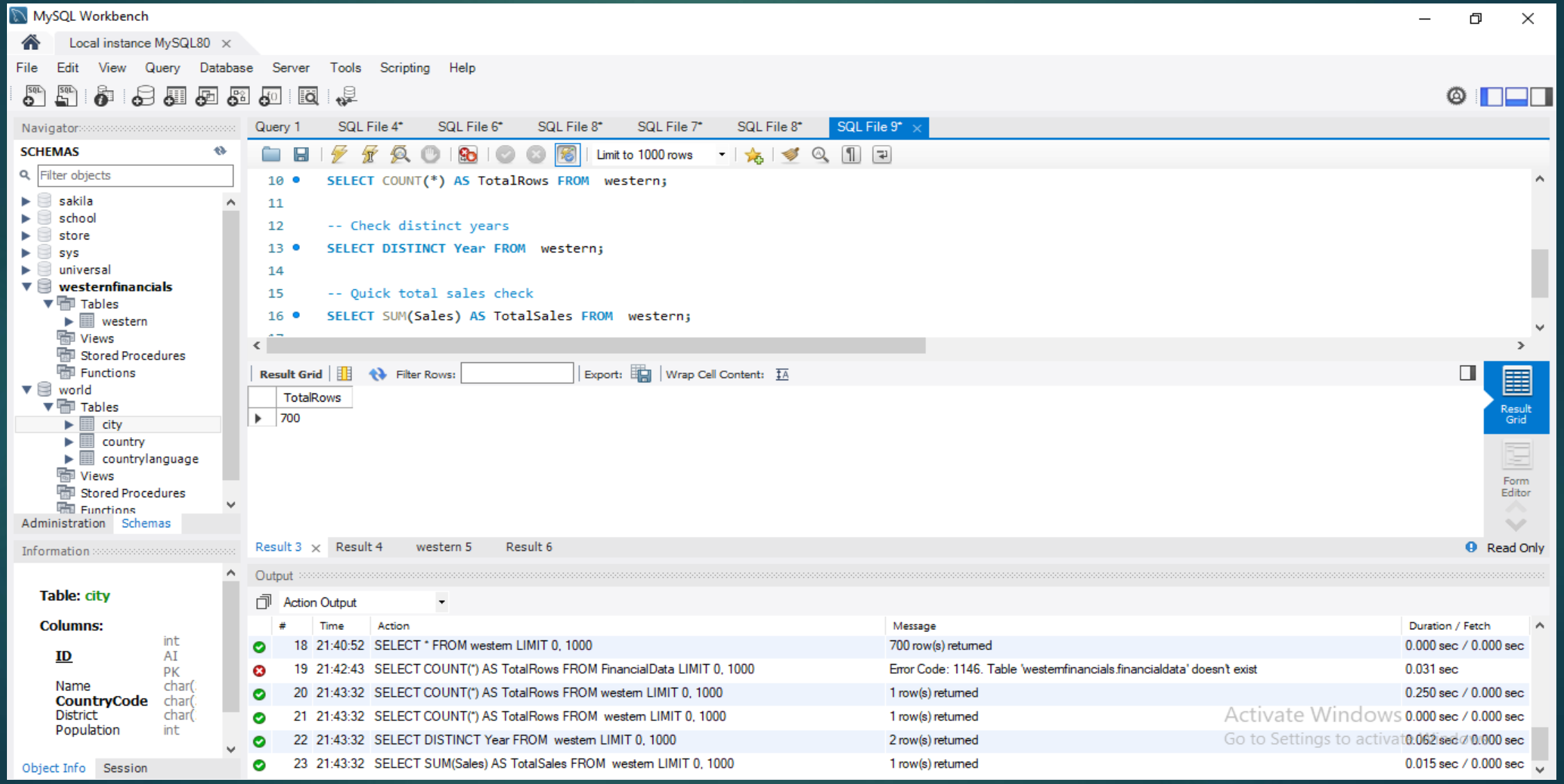
Product	Sum of Sales	Sum of Profit
Amarilla	17747116.1	2814104.06
Carretera	13815307.9	1826804.885
Montana	15390801.9	2114754.88
Paseo	33011144	4797437.95
Velo	18250059.5	2305992.465
VTT	20511921	3034608.02
Grand Total	118726350	16893702.26

Product	Sum of Discounts
Channel Par	134568.36
2013	34713.72
2014	99854.64
Enterprise	1457305.625
2013	370562.5
2014	1086743.125
Governmen	3898805.83
2013	920352.72
2014	2978453.11
Midmarket	200786.925
2013	45476.55
2014	155310.375
Small Busine	3513781.5
2013	774426
2014	2739355.5
Grand Total	9205248.24

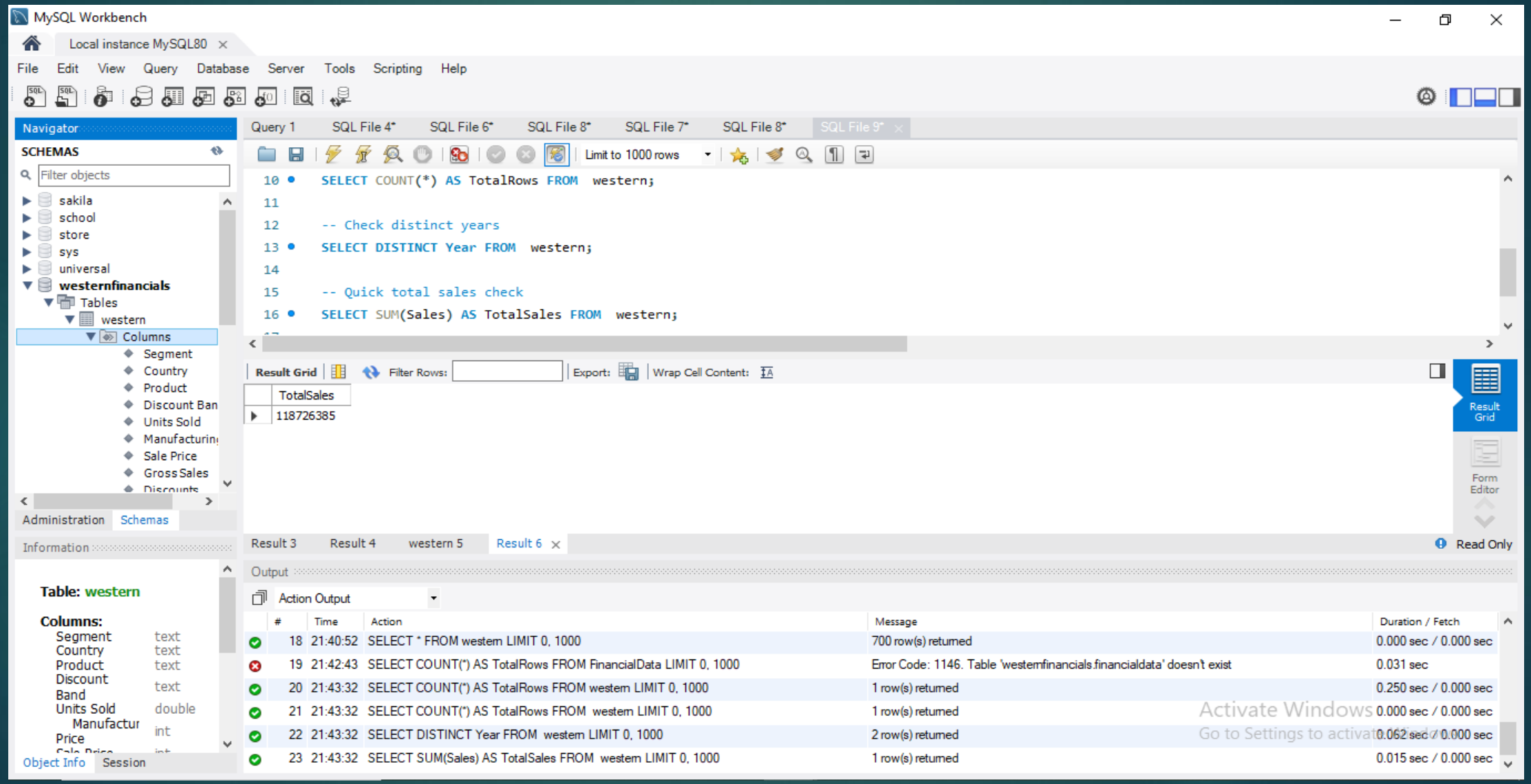
PERFORM GRAPHICAL ANALYSIS ON THE DATA USING EXCEL AND DERIVE INSIGHTS FROM IT.

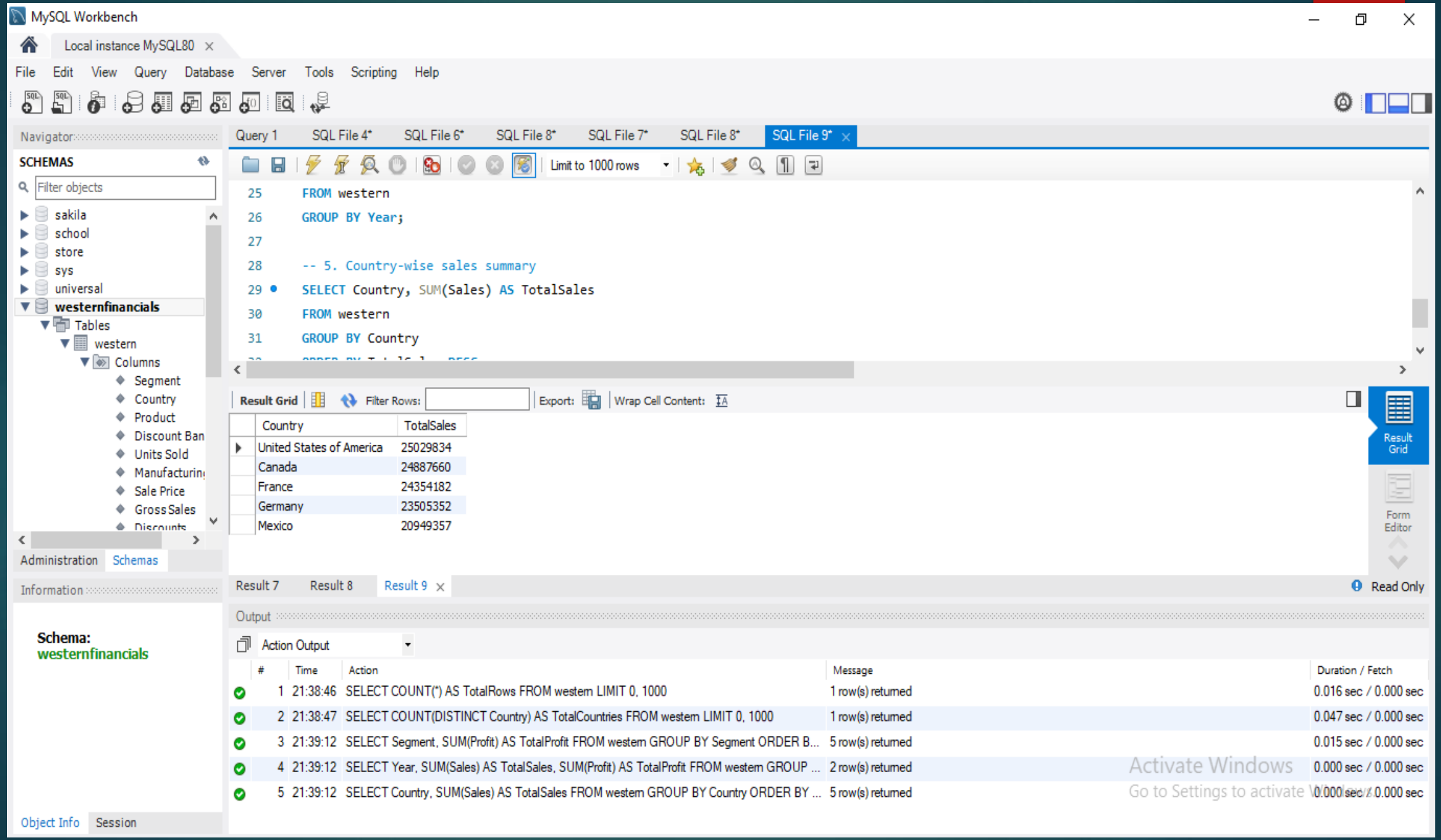


INSERT THE GIVEN DATA INTO THE SQL SERVER BY MAKING A DATABASE AND DEFINING THE REQUIRED PARAMETERS FOR THE CONSTRUCTION OF DATABASE AND DATABASE TABLES.



VERIFY IF THE DATA IS PROPERLY IMPORTED INTO THE SQL DATABASE (TRY RUNNING FEW QUERIES).




MySQL Workbench
Local instance MySQL80
File Edit View Query Database Server Tools Scripting Help
Navigator
SCHEMAS
Filter objects
sakila
school
store
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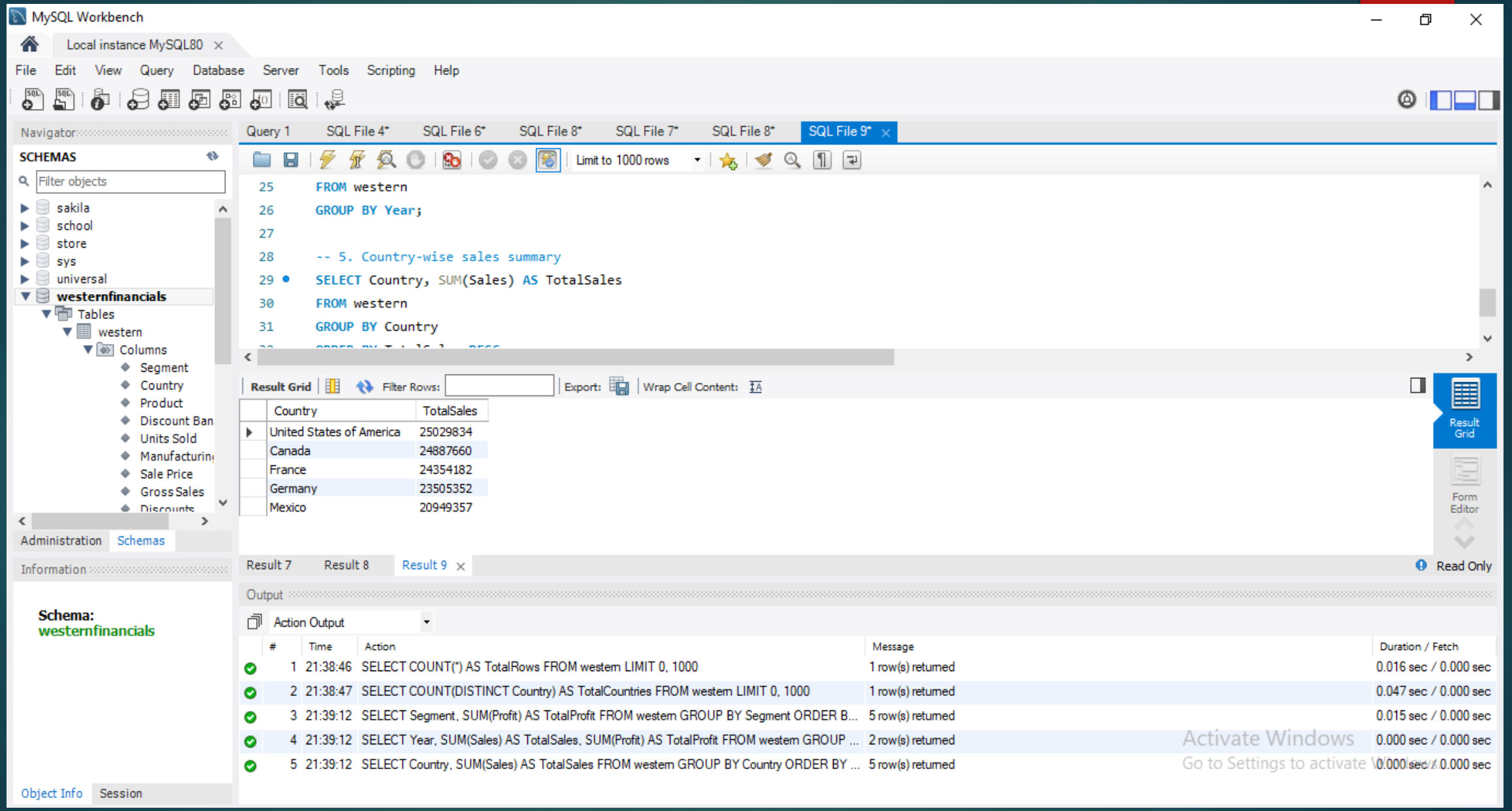
universal
westernfinancials
Tables
western
Columns
Segment
Country
Product
Discount Ban
Units Sold
Manufacturin
Sale Price
Gross Sales
Discounts
Administration Schemas
Information
Schema:
westernfinancials
Object Info Session
Query 1 SQL File 4* SQL File 6* SQL File 8* SQL File 7* SQL File 8* SQL File 9*
Limit to 1000 rows
25 FROM western
26 GROUP BY Year;
27
28 -- 5. Country-wise sales summary
29 SELECT Country, SUM(Sales) AS TotalSales
30 FROM western
31 GROUP BY Country
Result Grid Filter Rows: Export: Wrap Cell Content:
Country TotalSales
United States of America 25029834
Canada 24887660
France 24354182
Germany 23505352
Mexico 20949357
Result Grid
Form Editor
Result 7 Result 8 Result 9
Read Only
Output
Action Output
Time Action Message Duration / Fetch
1 21:38:46 SELECT COUNT(*) AS TotalRows FROM western LIMIT 0, 1000 1 row(s) returned 0.016 sec / 0.000 sec
2 21:38:47 SELECT COUNT(DISTINCT Country) AS TotalCountries FROM western LIMIT 0, 1000 1 row(s) returned 0.047 sec / 0.000 sec
3 21:39:12 SELECT Segment, SUM(Profit) AS TotalProfit FROM western GROUP BY Segment ORDER B... 5 row(s) returned 0.015 sec / 0.000 sec
4 21:39:12 SELECT Year, SUM(Sales) AS TotalSales, SUM(Profit) AS TotalProfit FROM western GROUP ... 2 row(s) returned 0.000 sec / 0.000 sec
5 21:39:12 SELECT Country, SUM(Sales) AS TotalSales FROM western GROUP BY Country ORDER BY ... 5 row(s) returned 0.000 sec / 0.000 sec
Activate Windows
Go to Settings to activate Windows.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Limit to 1000 rows
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30 FROM western
31 GROUP BY Country
Result Grid Filter Rows: Export: Wrap Cell Content:
Country TotalSales
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Canada 24887660
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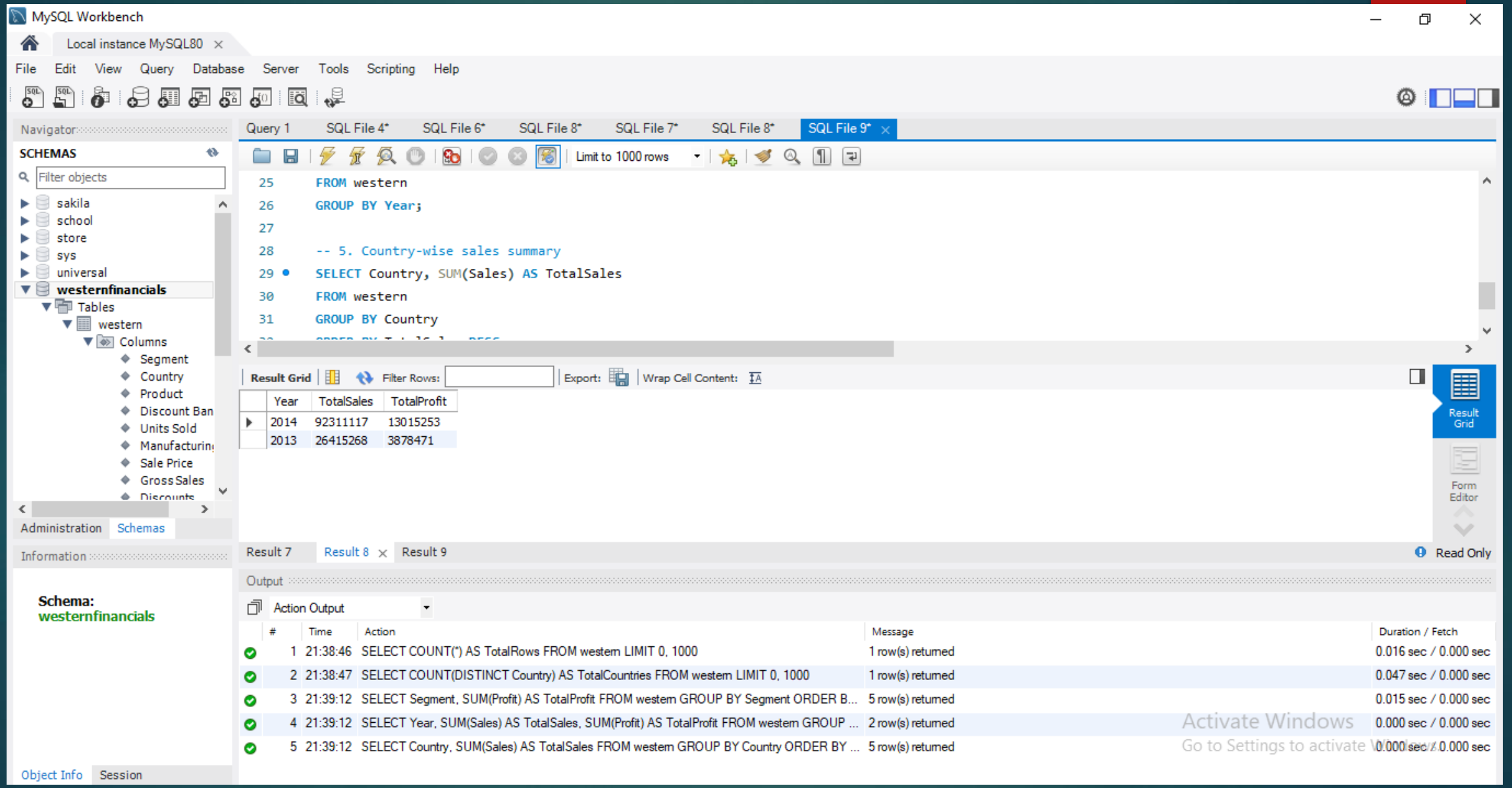
MySQL Workbench
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File Edit View Query Database Server Tools Scripting Help
Navigator
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Filter objects
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Sale Price
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Discounts
Administration Schemas
Information
Schema:
westernfinancials
Object Info Session
Query 1 SQL File 4* SQL File 6* SQL File 8* SQL File 7* SQL File 8* SQL File 9*
Limit to 1000 rows
25 FROM western
26 GROUP BY Year;
27
28 -- 5. Country-wise sales summary
29 SELECT Country, SUM(Sales) AS TotalSales
30 FROM western
31 GROUP BY Country
Result Grid Filter Rows: Export: Wrap Cell Content:
Year TotalSales TotalProfit
2014 92311117 13015253
2013 26415268 3878471
Result Grid
Form Editor
Result 7 Result 8 Result 9
Read Only
Output
Action Output
Time Action Message Duration / Fetch
1 21:38:46 SELECT COUNT(*) AS TotalRows FROM western LIMIT 0, 1000 1 row(s) returned 0.016 sec / 0.000 sec
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5 21:39:12 SELECT Country, SUM(Sales) AS TotalSales FROM western GROUP BY Country ORDER BY ... 5 row(s) returned 0.000 sec / 0.000 sec
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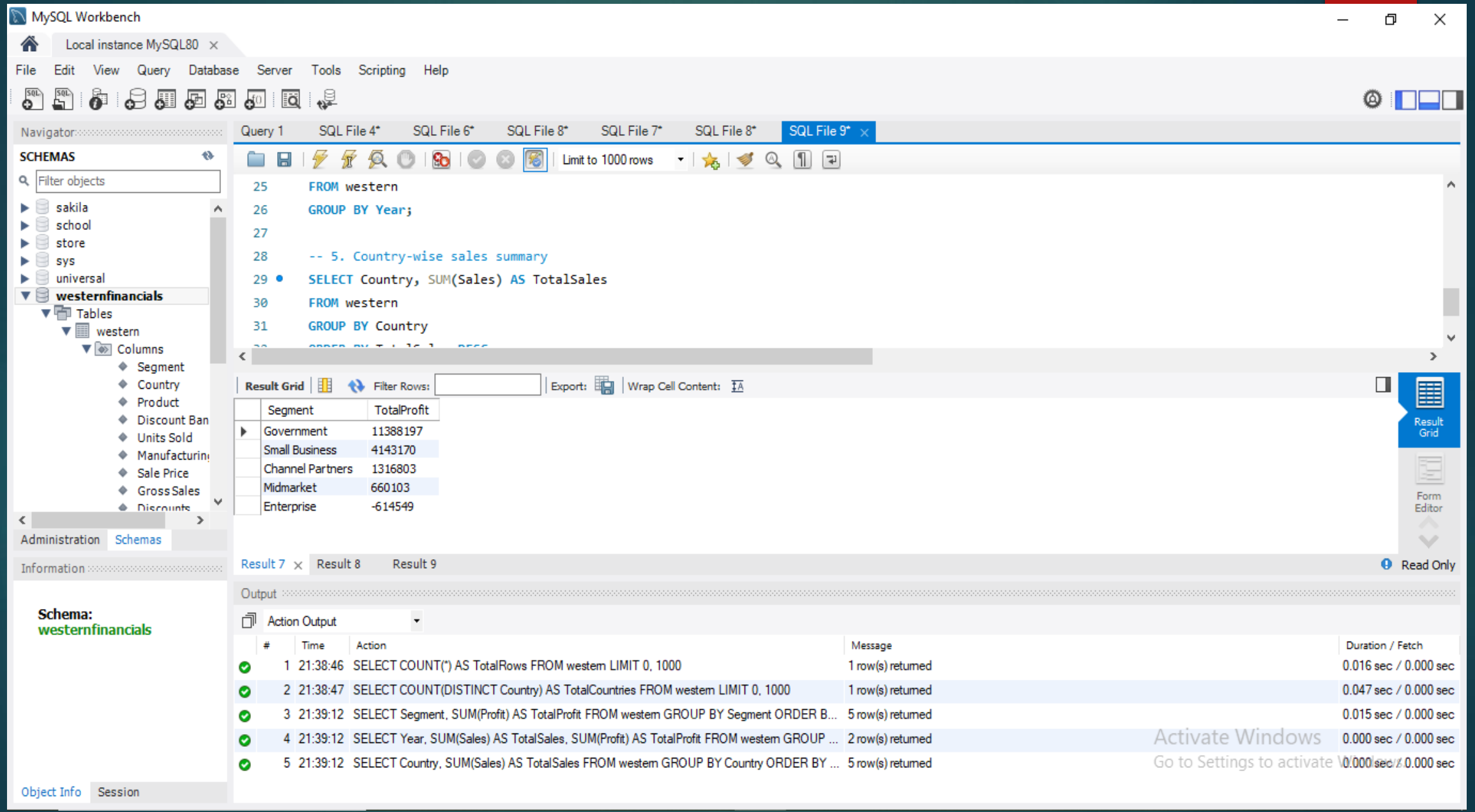
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Schema:
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Object Info Session
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Limit to 1000 rows
25 FROM western
26 GROUP BY Year;
27
28 -- 5. Country-wise sales summary
29 SELECT Country, SUM(Sales) AS TotalSales
30 FROM western
31 GROUP BY Country
Result Grid Filter Rows: Export: Wrap Cell Content:
Segment TotalProfit
Government 11388197
Small Business 4143170
Channel Partners 1316803
Midmarket 660103
Enterprise -614549
Result Grid
Form Editor
Result 7 Result 8 Result 9
Read Only
Output
Action Output
Time Action Message Duration / Fetch
1 21:38:46 SELECT COUNT(*) AS TotalRows FROM western LIMIT 0, 1000 1 row(s) returned 0.016 sec / 0.000 sec
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4 21:39:12 SELECT Year, SUM(Sales) AS TotalSales, SUM(Profit) AS TotalProfit FROM western GROUP ... 2 row(s) returned 0.000 sec / 0.000 sec
5 21:39:12 SELECT Country, SUM(Sales) AS TotalSales FROM western GROUP BY Country ORDER BY ... 5 row(s) returned 0.000 sec / 0.000 sec
Activate Windows
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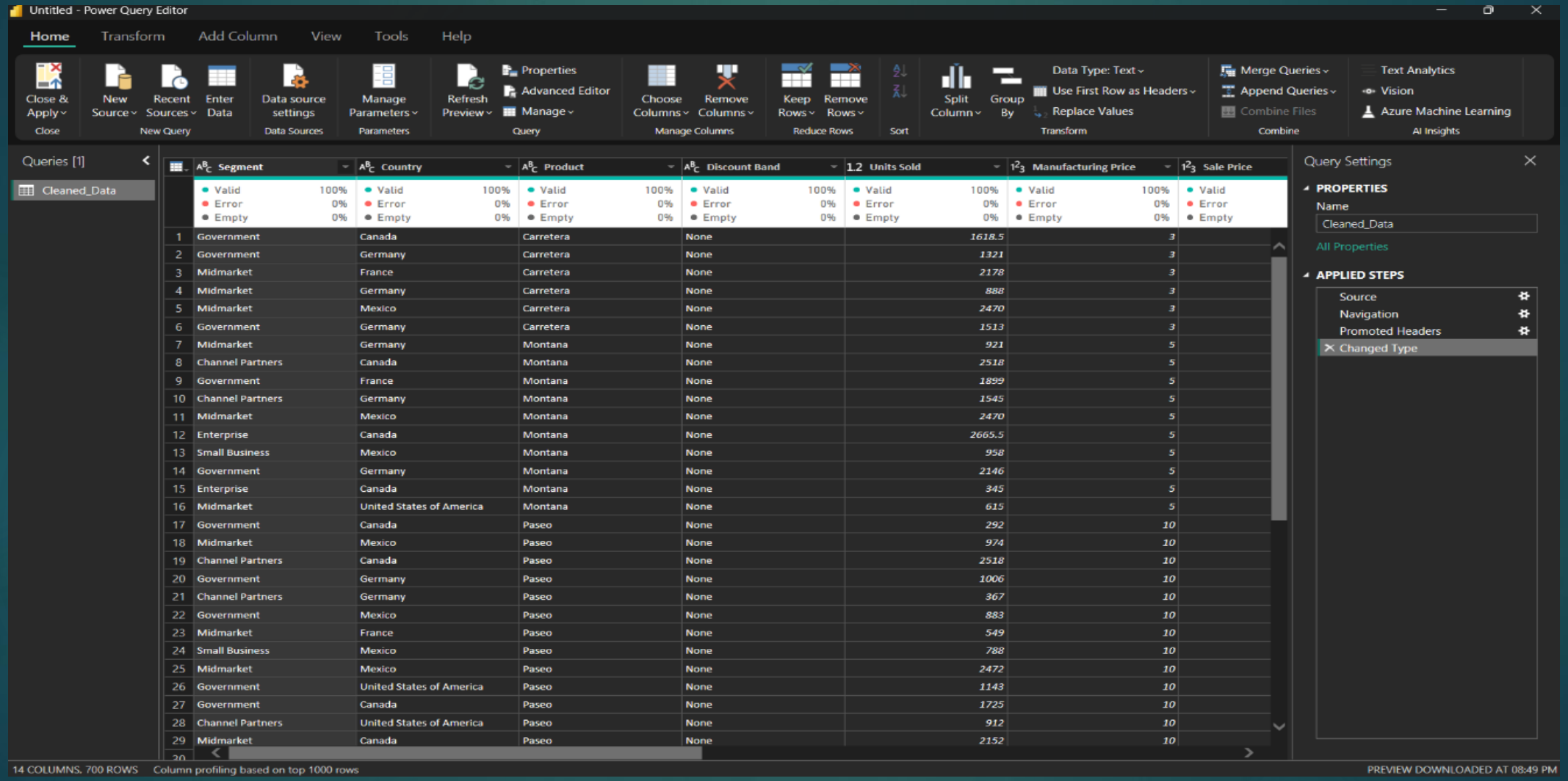
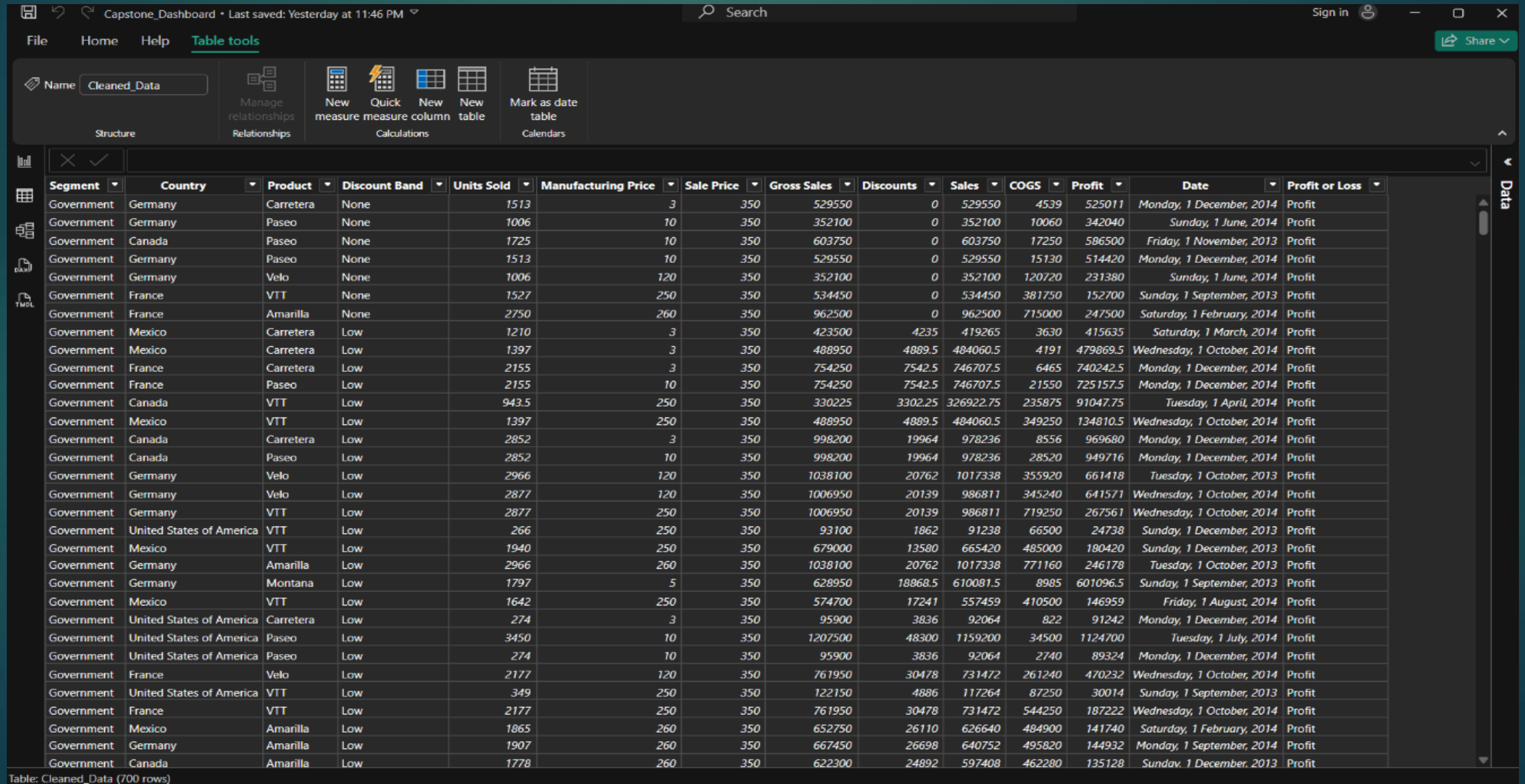
IMPORT THE DATA FROM THE SQL DATABASE INTO POWER BI, VERIFY IF THE DATA IS PROPERLY IMPORTED OR NOT.



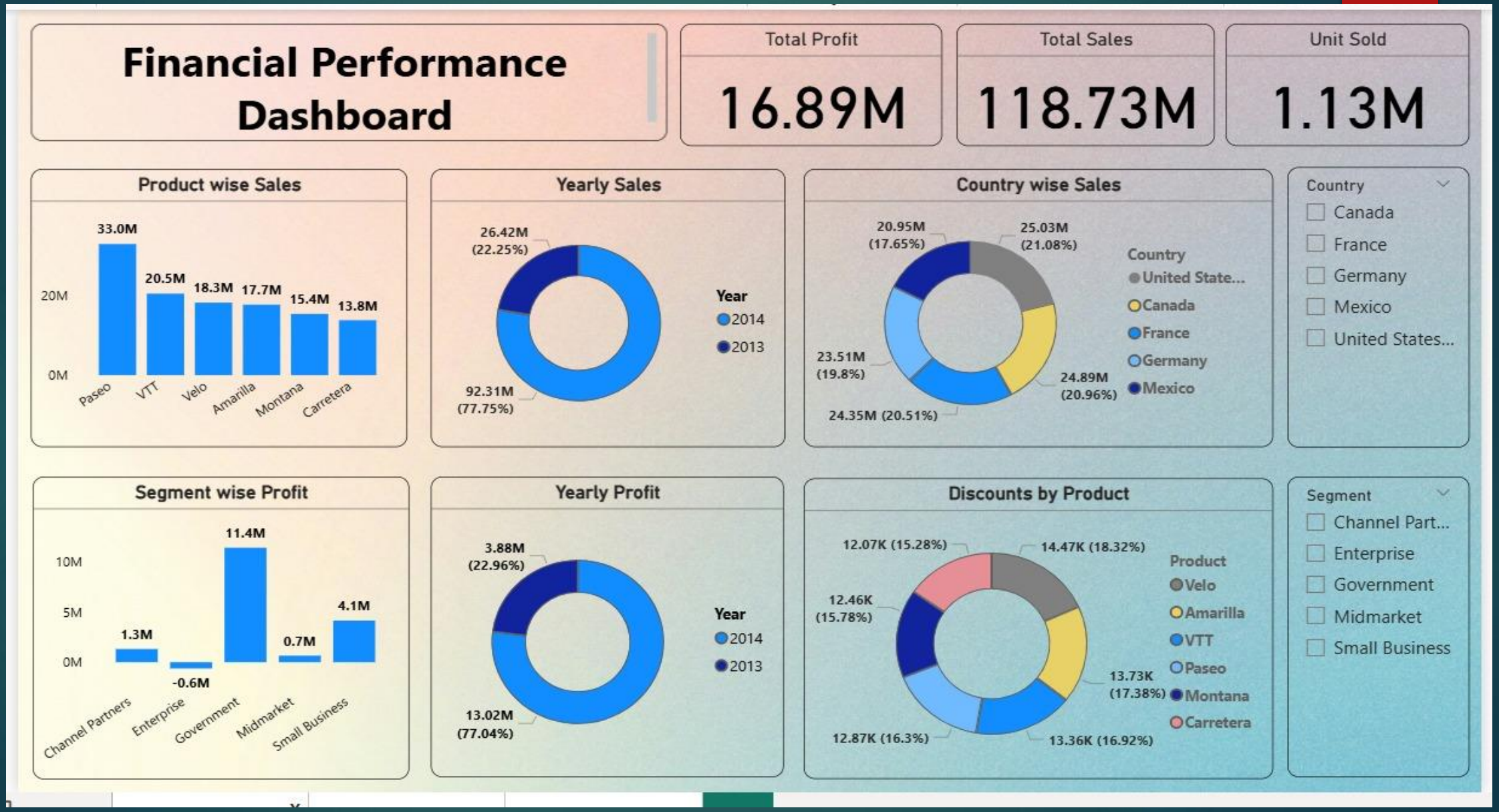
PERFORM DATA CLEANING AND OTHER POSSIBLE OPERATIONS ON DATA USING QUERY EDITOR, CREATE MEASURES IF NECESSARY AND USE THEM TO VISUALIZE THE DATA AND MAKE AN INTERACTIVE VISUALIZATION.



Segment	Country	Product	Discount Band	Units Sold	Manufacturing Price	Sale Price	Gross Sales	Discounts	Sales	COGS	Profit	Date	Profit or Loss
Government	Germany	Carretera	None	1513	3	350	529550	0	529550	4539	525011	Monday, 1 December, 2014	Profit
Government	Germany	Paseo	None	1006	10	350	352100	0	352100	10060	342040	Sunday, 1 June, 2014	Profit
Government	Canada	Paseo	None	1725	10	350	603750	0	603750	17250	586500	Friday, 1 November, 2013	Profit
Government	Germany	Paseo	None	1513	10	350	529550	0	529550	15130	514420	Monday, 1 December, 2014	Profit
Government	Germany	Velo	None	1006	120	350	352100	0	352100	120720	231380	Sunday, 1 June, 2014	Profit
Government	France	VTT	None	1527	250	350	534450	0	534450	381750	152700	Sunday, 1 September, 2013	Profit
Government	France	Amarilla	None	2750	260	350	962500	0	962500	715000	247500	Saturday, 1 February, 2014	Profit
Government	Mexico	Carretera	Low	1210	3	350	423500	4235	419265	3630	415635	Saturday, 1 March, 2014	Profit
Government	Mexico	Carretera	Low	1397	3	350	488950	4889.5	484060.5	4191	479869.5	Wednesday, 1 October, 2014	Profit
Government	France	Carretera	Low	2155	3	350	754250	7542.5	746707.5	6465	740242.5	Monday, 1 December, 2014	Profit
Government	France	Paseo	Low	2155	10	350	754250	7542.5	746707.5	21550	725157.5	Monday, 1 December, 2014	Profit
Government	Canada	VTT	Low	943.5	250	350	330225	3302.25	326922.75	235875	91047.75	Tuesday, 1 April, 2014	Profit
Government	Mexico	VTT	Low	1397	250	350	488950	4889.5	484060.5	349250	134810.5	Wednesday, 1 October, 2014	Profit
Government	Canada	Carretera	Low	2852	3	350	998200	19964	978236	8556	969680	Monday, 1 December, 2014	Profit
Government	Canada	Paseo	Low	2852	10	350	998200	19964	978236	28520	949716	Monday, 1 December, 2014	Profit
Government	Germany	Velo	Low	2966	120	350	1038100	20762	1017338	355920	661418	Tuesday, 1 October, 2013	Profit
Government	Germany	Velo	Low	2877	120	350	1006950	20139	986811	345240	641571	Wednesday, 1 October, 2014	Profit
Government	Germany	VTT	Low	2877	250	350	1006950	20139	986811	719250	267561	Wednesday, 1 October, 2014	Profit
Government	United States of America	VTT	Low	266	250	350	93100	1862	91238	66500	24738	Sunday, 1 December, 2013	Profit
Government	Mexico	VTT	Low	1940	250	350	679000	13580	665420	485000	180420	Sunday, 1 December, 2013	Profit
Government	Germany	Amarilla	Low	2966	260	350	1038100	20762	1017338	771160	246178	Tuesday, 1 October, 2013	Profit
Government	Germany	Montana	Low	1797	5	350	628950	18868.5	610081.5	8985	601096.5	Sunday, 1 September, 2013	Profit
Government	Mexico	VTT	Low	1642	250	350	574700	17241	557459	410500	146959	Friday, 1 August, 2014	Profit
Government	United States of America	Carretera	Low	274	3	350	95900	3836	92064	822	91242	Monday, 1 December, 2014	Profit
Government	United States of America	Paseo	Low	3450	10	350	1207500	48300	1159200	34500	1124700	Tuesday, 1 July, 2014	Profit
Government	United States of America	Paseo	Low	274	10	350	95900	3836	92064	2740	89324	Monday, 1 December, 2014	Profit
Government	France	Velo	Low	2177	120	350	761950	30478	731472	261240	470232	Wednesday, 1 October, 2014	Profit
Government	United States of America	VTT	Low	349	250	350	122150	4886	117264	87250	30014	Sunday, 1 September, 2013	Profit
Government	France	VTT	Low	2177	250	350	761950	30478	731472	544250	187222	Wednesday, 1 October, 2014	Profit
Government	Mexico	Amarilla	Low	1865	260	350	652750	26110	626640	484900	141740	Saturday, 1 February, 2014	Profit
Government	Germany	Amarilla	Low	1907	260	350	667450	26698	640752	495820	144932	Monday, 1 September, 2014	Profit
Government	Canada	Amarilla	Low	1778	260	350	622300	24892	597408	462280	135128	Sunday, 1 December, 2013	Profit

Table: Cleaned_Data (700 rows)

MAKE A DETAILED INTERACTIVE DASHBOARD BY USING VISUALIZATION TOOLS SUCH AS POWER BI AND ANSWER THE FOLLOWING QUESTIONS:



Segment
Channel Partners
Enterprise
Government
Midmarket
Small Business
Sales by Product and Segment
Segment Channel Partners Enterprise Government Midmarket Small Business
15M
10M
5M
0M
Paseo
VTT
Velo
Amarilla
Montana
Carretera
Profit by Product and Segment
Segment Channel Partners Enterprise Government Midmarket Small Business
3M
2M
1M
0M
Paseo
VTT
Amarilla
Velo
Montana
Carretera

No. of units sold year over year
Total Units Sold YoY%
Total Units Sold
Total Units Sold YoY% and ...
10000K%
5000K%
0K%
53K
65K
96K
51K
79K
61K
102K
55K
68K
69K
103K
53K
52K
56K
105K
57K
0K%
0K%
0K%
0K%
December
November
October
September
April
August
December
February
January
July
June
March
May
November
October
September
2013
2014
Bottom 3 Product by Sales
20M
15M
10M
5M
0M
Amarilla
Montana
Carretera
Sales and Profit by Quarter
Sum of Sales
Sum of Profit
60M
40M
20M
0M
52M
23M
25M
19M
8M
3M
3M
4M
Qtr 1
Qtr 2
Qtr 3
Qtr 4
Top 2 Country by Sales
25M
25M
20M
10M
0M
United States of America
Canada
Quarter
Qtr 1
Qtr 2
Qtr 3
Qtr 4
Year
2013
2014

Create a Visually Pleasing Dashboard Report by Following the Rules of Making the Dashboard

Objective:

The purpose of this dashboard is to analyze the company's sales, profit, and units sold across different years, countries, products, and segments. It helps identify top-performing areas, underperforming products, and overall year-over-year growth trends.

Dashboard Highlights:

Overall Performance (KPIs)
Total Sales: 118.73M
Total Profit: 16.89MTotal Units Sold: 1.13M
These KPIs give a quick snapshot of the company's overall financial health.

Create a Visually Pleasing Dashboard Report by Following the Rules of Making the Dashboard

Product Analysis

Top Product by Sales: Paseo (33M)
Bottom 3 Products by Sales: Amarilla, Montana, Carretera
Product-wise Discounts: Clear distribution of discounts applied across six products.

Segment Analysis

Most Profitable Segment: Small Business (4.1M profit)
Least Profitable Segment: Government (-0.6M loss)
Segment vs Product breakdown shows clear differences in contribution across categories.

Yearly Trends

Sales jumped significantly from 2013 → 2014, with total sales increasing by ~249% YoY.
Yearly Sales: 2013 – 26.42M | 2014 – 92.31M
Yearly Profit: 2013 – 3.88M | 2014 – 13.02M

Create a visually pleasing dashboard report by following the rules of making the dashboard

Country Analysis

Top 2 Countries by Sales: United States & Canada (25M each)
Germany & Mexico contributed more profit margins.

Quarterly Analysis

Q4 had the highest performance with 52M sales and 8M profit, showing strong seasonal demand.

Units Sold Year over Year (YoY)

Units sold fluctuated monthly but showed consistent growth in 2014 compared to 2013.
Peak months: October & December (2014) with over 100K units sold.

Create a Visually Pleasing Dashboard Report by Following the Rules of Making the Dashboard

Design Approach

KPIs at the top for quick overview (Sales, Profit, Units Sold).
Bar & Line charts for product, segment, and country analysis.
Donut charts for yearly & discount distribution.
Interactive filters for Year, Segment, and Country to allow dynamic analysis.

Conclusion & Insights

Growth: Sales surged in 2014, with YoY growth of ~249%.
Products: Paseo dominates in sales, while Amarilla & VTT need improvement.
Segments: Small Business is most profitable; Government segment is underperforming.
Geography: USA & Canada are largest sales contributors; Germany & Mexico yield high profitability.
Seasonality: Q4 is the strongest quarter, indicating year-end demand spikes.

Derive Conclusion and Inferences from the Dashboard

Key Conclusions

1:- Overall Growth

The company achieved Total Sales of 118.73M, Total Profit of 16.89M, and sold 1.13M units across 2013–2014.
A ~249% surge in sales in 2014 compared to 2013 highlights significant business expansion.

2:- Product Insights

Paseo is the top-selling product (33M) and a major revenue driver.
Amarilla, Montana, and Carretera are the bottom 3 products with lowest sales, needing strategic review.
Discounts were spread fairly evenly across products, but they didn’t always translate into higher profits.

Derive Conclusion and Inferences from the Dashboard

3:- Segment Insights

Small Business is the most profitable segment (4.1M profit).
Government segment incurred losses (-0.6M), making it a critical area for improvement.
Midmarket and Channel Partners show mixed performance, needing optimized pricing and strategies.

4:- Geographical Insights

USA & Canada contributed the highest sales (25M each).
Germany & Mexico delivered strong profitability despite smaller sales volumes, showing better efficiency.

Derive Conclusion and Inferences from the Dashboard

5:- Yearly & Quarterly Trends

Sales and profit peaked in Q4 (52M sales, 8M profit), suggesting strong year-end demand.

Monthly unit sales highlight October & December as peak months (>100K units sold).

Derive Conclusion and Inferences from the Dashboard

Inferences for Business Strategy

Product Strategy: Focus on high-demand products like Paseo and review underperforming ones (Amarilla, Montana, Carretera) for pricing, promotion, or discontinuation.

Segment Strategy: Strengthen efforts in Small Business while restructuring or limiting exposure to the Government segment to reduce losses.

Geographic Strategy: Increase investments in USA & Canada to sustain sales momentum and expand strategies in Germany & Mexico to capitalize on profitability.

Seasonality Planning: Leverage strong Q4 demand with targeted marketing campaigns, inventory stock-up, and promotional offers.

Discount Optimization: Reassess discount strategies to ensure they directly contribute to profit growth rather than only driving sales volume.

Derive Conclusion and Inferences from the Dashboard

Final Takeaway:

The dashboard provides end-to-end visibility of financial health, enabling management to take data-driven decisions. By focusing on profitable regions and segments, optimizing underperforming products, and leveraging seasonal demand, the company can sustain growth and increase profitability in the coming years.

Thank you