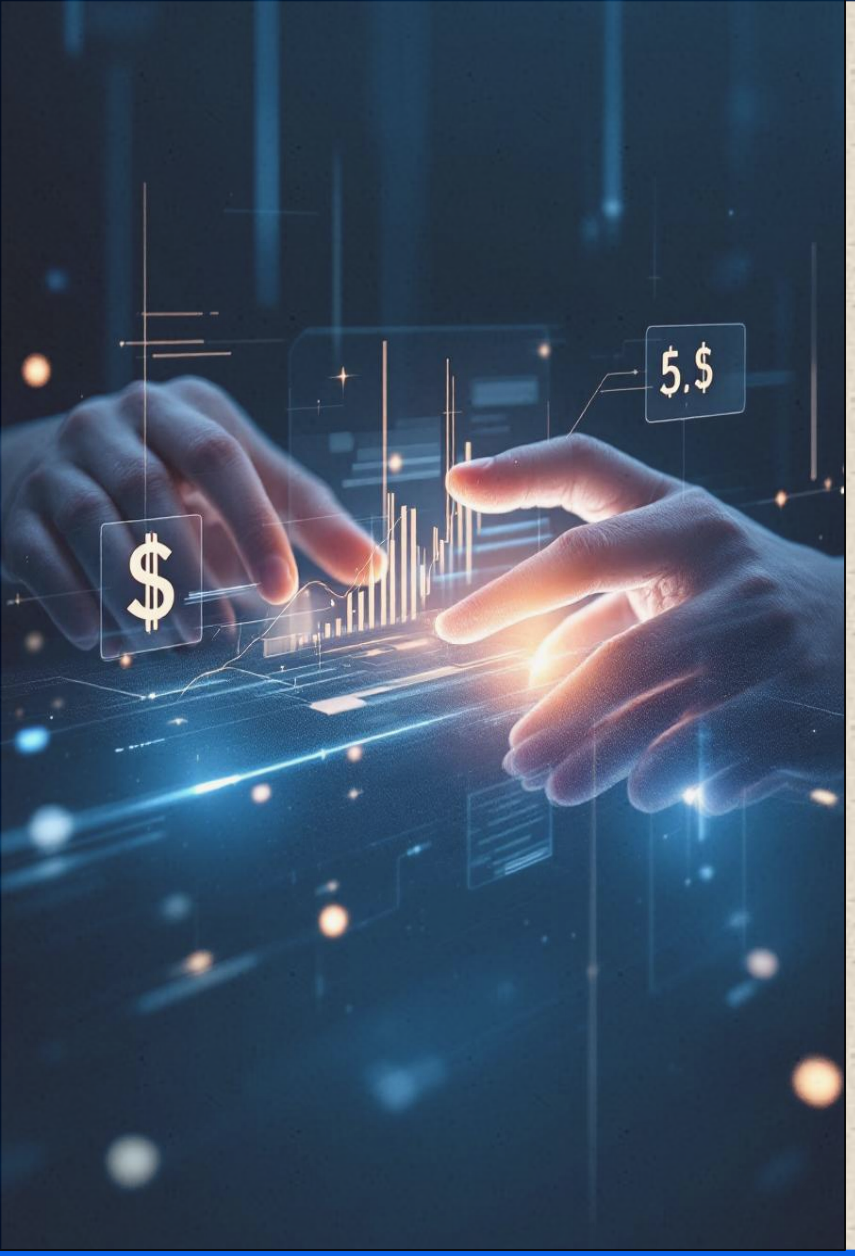


Personal Finance Dashboard using Power BI

A Data Analytics Project

Hrishikesh Sarma

hrishikesh2005sarma@gmail.com

linkedin.com/in/hrishikesh-sarma-67b58528a/

Project Description

Managing personal finances is often challenging without proper tracking. This project leverages Power BI to design an interactive dashboard that monitors key metrics such as income, expenses, and savings, helping users make smarter financial decisions.

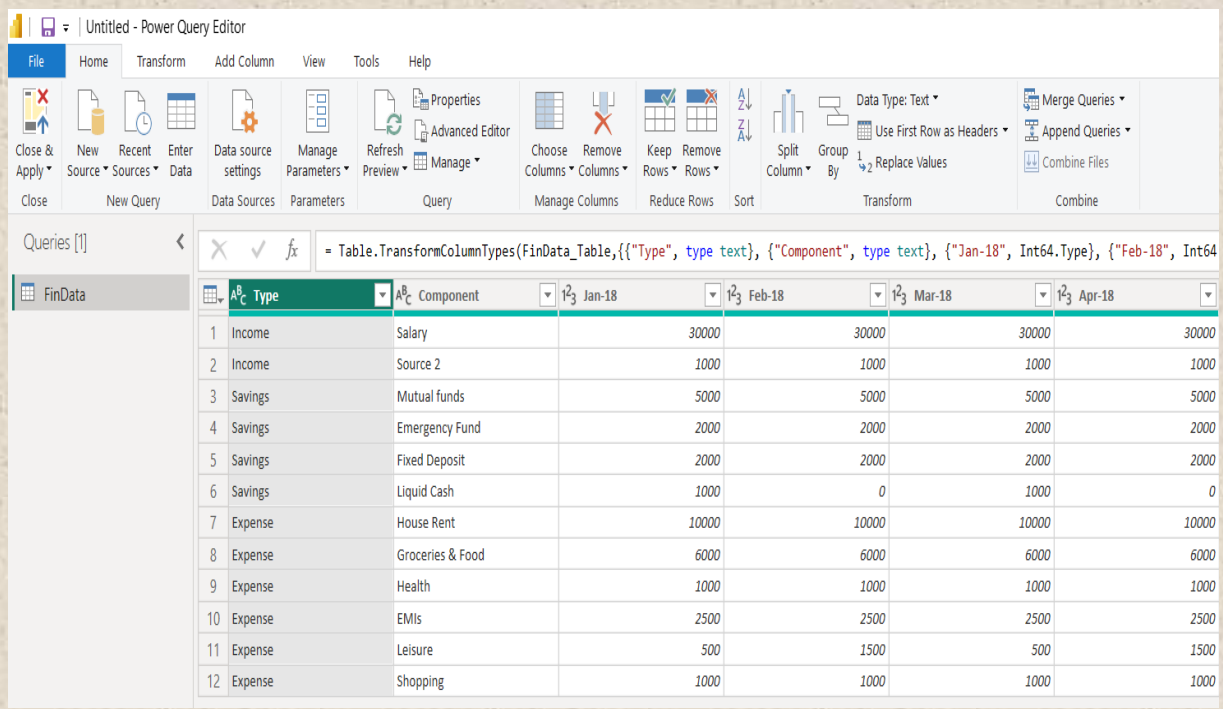
Project Objectives

KPIs & Tracking → Income, Expense %, Savings %, Net Worth.

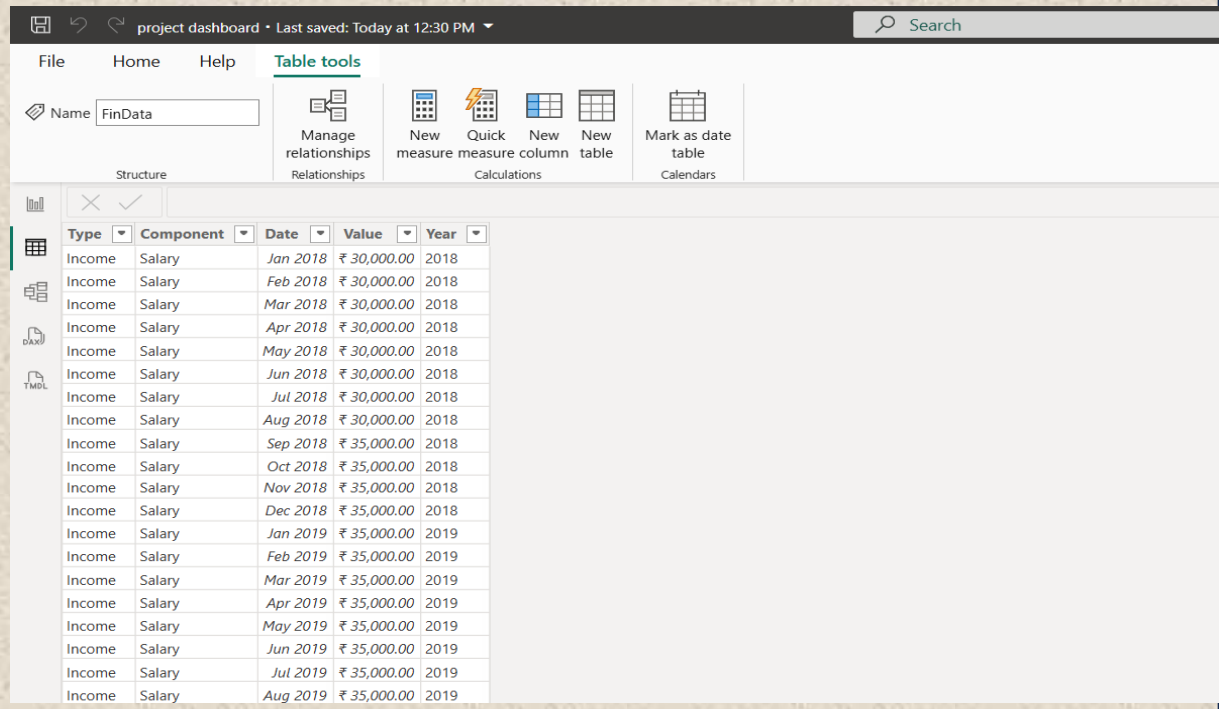
Visual Insights → Expense Breakdown, Income vs Expense Trend

Savings Focus → Allocation by type, Savings Goal (target %)

Data Transformation



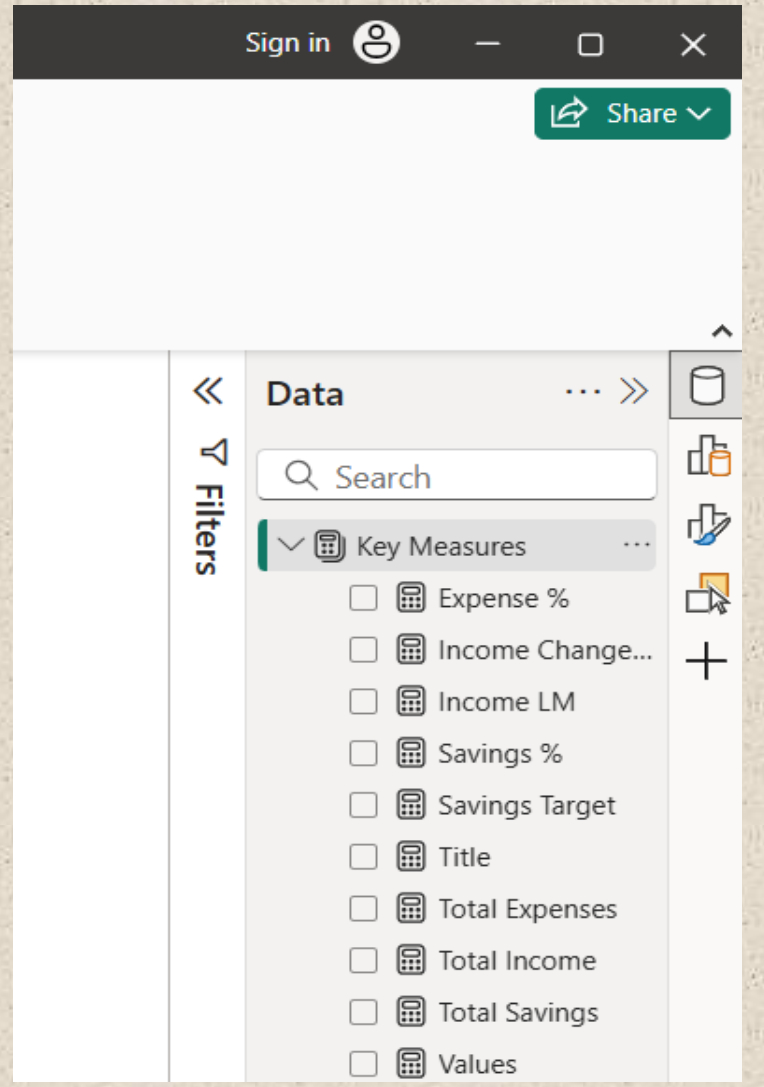
	Type	Component	Jan-18	Feb-18	Mar-18	Apr-18
1	Income	Salary	30000	30000	30000	30000
2	Income	Source 2	1000	1000	1000	1000
3	Savings	Mutual funds	5000	5000	5000	5000
4	Savings	Emergency Fund	2000	2000	2000	2000
5	Savings	Fixed Deposit	2000	2000	2000	2000
6	Savings	Liquid Cash	1000	0	1000	0
7	Expense	House Rent	10000	10000	10000	10000
8	Expense	Groceries & Food	6000	6000	6000	6000
9	Expense	Health	1000	1000	1000	1000
10	Expense	EMIs	2500	2500	2500	2500
11	Expense	Leisure	500	1500	500	1500
12	Expense	Shopping	1000	1000	1000	1000



Type	Component	Date	Value	Year
Income	Salary	Jan 2018	₹ 30,000.00	2018
Income	Salary	Feb 2018	₹ 30,000.00	2018
Income	Salary	Mar 2018	₹ 30,000.00	2018
Income	Salary	Apr 2018	₹ 30,000.00	2018
Income	Salary	May 2018	₹ 30,000.00	2018
Income	Salary	Jun 2018	₹ 30,000.00	2018
Income	Salary	Jul 2018	₹ 30,000.00	2018
Income	Salary	Aug 2018	₹ 30,000.00	2018
Income	Salary	Sep 2018	₹ 35,000.00	2018
Income	Salary	Oct 2018	₹ 35,000.00	2018
Income	Salary	Nov 2018	₹ 35,000.00	2018
Income	Salary	Dec 2018	₹ 35,000.00	2018
Income	Salary	Jan 2019	₹ 35,000.00	2019
Income	Salary	Feb 2019	₹ 35,000.00	2019
Income	Salary	Mar 2019	₹ 35,000.00	2019
Income	Salary	Apr 2019	₹ 35,000.00	2019
Income	Salary	May 2019	₹ 35,000.00	2019
Income	Salary	Jun 2019	₹ 35,000.00	2019
Income	Salary	Jul 2019	₹ 35,000.00	2019
Income	Salary	Aug 2019	₹ 35,000.00	2019

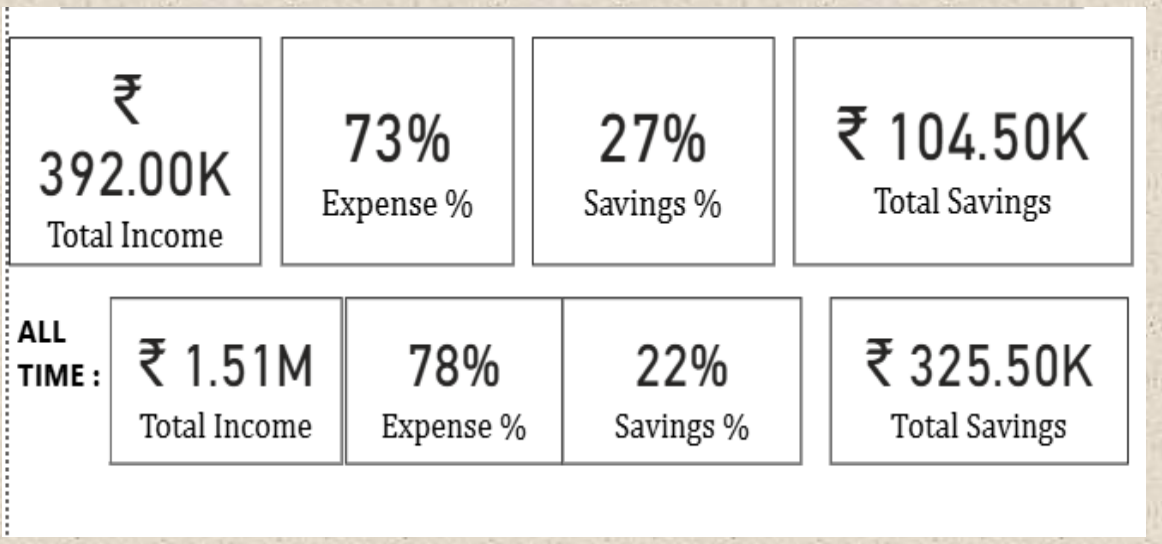
The dataset initially had multiple date columns and inconsistent formats.
I applied transformations in Power Query — unpivoted the date columns into a single Date column, formatted it as *MMM YYYY*, formatted the Value column into rupees, and created a Year column for time-based analysis.
On the left is the dataset before transformation, and on the right is after.

Key Measures in Power BI

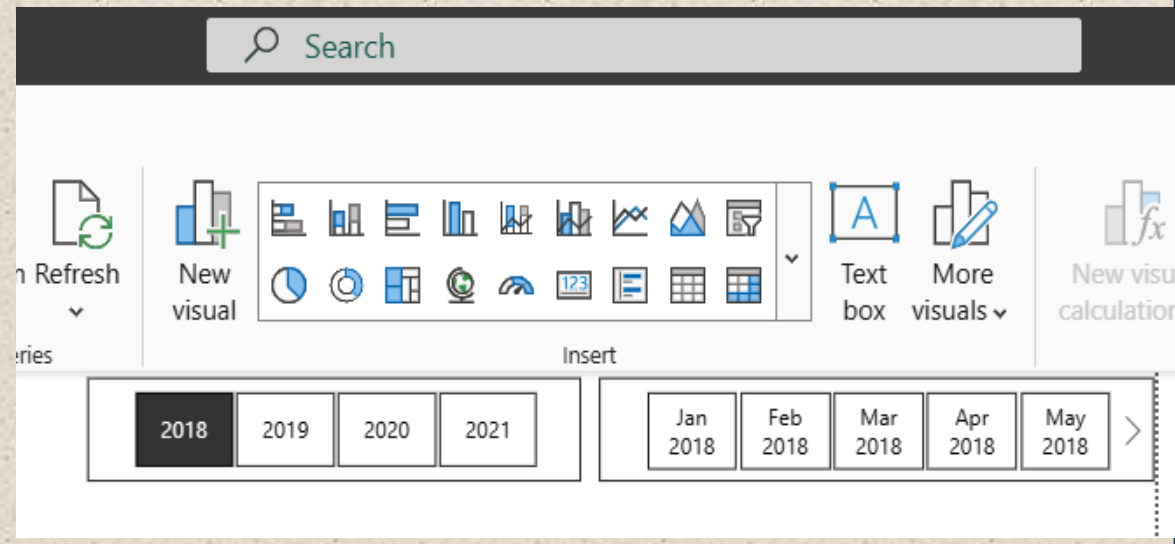


Measures play a crucial role in transforming raw data into meaningful insights.
In this project, DAX measures were created to calculate key financial indicators such as **Total Income**, **Total Expense**, **Savings%**, **Expense %**, and **Total Savings**.
These measures serve as the foundation for KPIs and charts, enabling accurate trend analysis and performance tracking across time.

KPIs and Slicers in Dashboard



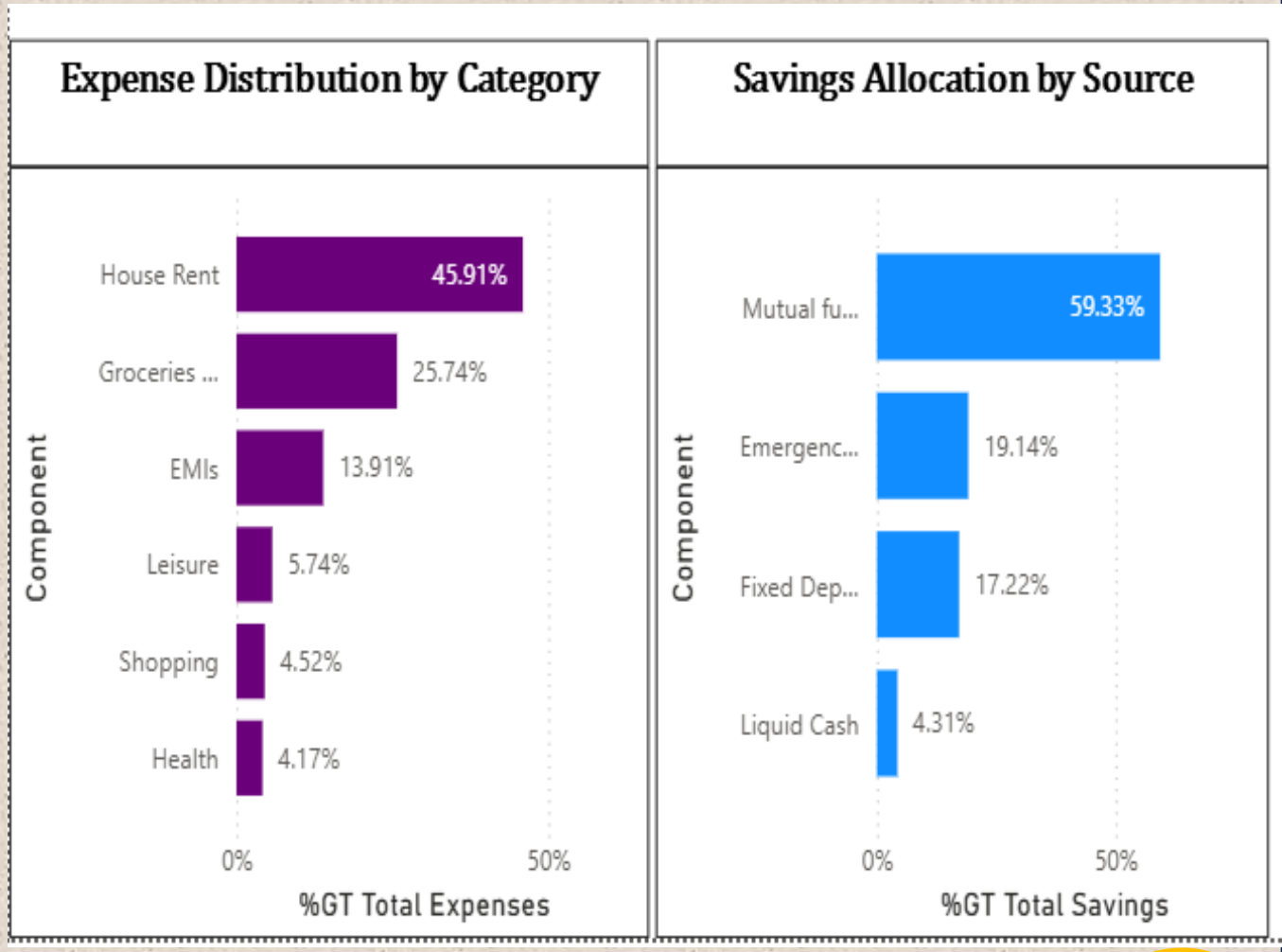
The dashboard includes KPIs for **Total Income, Total Savings, Expense %**, and **Saving %**, offering a quick snapshot of financial performance. Additionally, **"All Time" KPIs** were added — these remain unaffected by slicers, allowing users to **compare selected period values with overall totals** for better context.



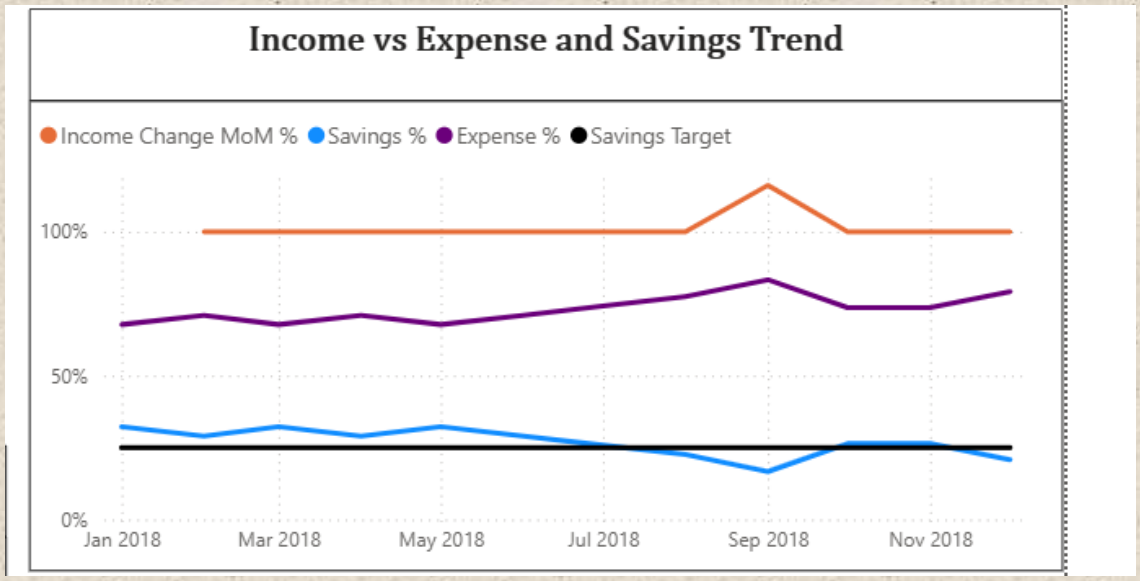
Interactive **slicers** (in button form) were created for **Year** and **Month–Year** selections. They enable users to filter data dynamically and analyze performance across specific time frames while comparing them with all-time totals.

Expense and Savings Distribution

The bar charts visualize how income is distributed across **expenses and savings**.
The **Expense Distribution** chart highlights major spending categories such as rent, food, and shopping, while the **Savings Allocation** chart shows how savings are divided across sources like bank accounts and mutual funds.
These visuals help identify spending patterns and evaluate saving efficiency.



Trend Analysis and Detailed Financial Statement



Detailed Financial Statement

Order No.	2018	Total
1	**₹ 3,92,000.00**	**₹ 3,92,000.00**
Income	₹ 3,92,000.00	**₹ 3,92,000.00**
2	**₹ 1,04,500.00**	**₹ 1,04,500.00**
Savings	₹ 1,04,500.00	**₹ 1,04,500.00**
3	**₹ 2,87,500.00**	**₹ 2,87,500.00**
Expense	₹ 2,87,500.00	**₹ 2,87,500.00**
Total	**₹ 7,84,000.00**	**₹ 7,84,000.00**

The **trend line chart** illustrates the relationship between income, expenses, and savings over time, helping identify months of overspending or improved savings.
A **target line** (e.g., 25% savings goal) is added to track whether the savings percentage meets the desired benchmark.
The **detailed financial table** provides the exact figures for income, expenses, and savings, supporting the insights seen in the trend chart.