

# Project Report

Title:	Financial Performance Dashboard
Tools Used:	PowerBI

## 1. Executive Summary

The Financial Analytics Dashboard provides a comprehensive view of company sales, profit, units sold, and discount strategies across countries, segments, and product lines. It enables leadership to assess financial performance and make informed decisions on pricing, promotions, and market targeting.

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## 2. Key Performance Indicators (KPIs)

Metric	Value (example)	Description
Total Sales	₹X,XXX,XXX	Total revenue generated from all transactions.
Total Profit	₹X,XXX,XXX	Net profit after cost of goods sold.
Total Units Sold	XXX,XXX	Total quantity of items sold.
Avg. Profit Margin	XX.XX%	Average profit earned per ₹1 of sales.

## 3. Trend Analysis

### Line Chart: Sales & Profit Over Time

- Shows month-wise performance.

- Identifies peaks in sales & profit.
- Enables seasonal trend tracking.

#### **Insights Example:**

- Profit dipped in Q2 despite steady sales → review cost or discounting strategy.
- Strong sales growth in Q4 → plan inventory accordingly.

## **4. Category Performance**

### **Profit by Product**

- Bar chart shows product-level profitability.
- Highlights high-margin vs low-performing products.

### **Sales by Segment**

- Visualizes how much each customer segment contributes to revenue.

### **Sales by Country (TreeMap or Donut)**

- Quick view of sales distribution by geography.
- Supports regional targeting and expansion strategy.

## **5. Discount Impact**

### **Scatter Plot: Discounts vs Profit**

- Analyzes correlation between discounting and profitability.
- Helps identify if deeper discounts lead to lower profit.

### **Bar: Discount Band vs Units Sold**

- Shows if higher discounts boost sales volume.
- Assists in refining promotional strategies.

## 6. Interactive Filters

Slicers for:

- **Year**
- **Segment**
- **Product**
- **Country**

→ Allow users to analyze data from multiple perspectives and customize views in real time.

## 7. Data Cleaning Summary

- Removed \$ and , from currency columns
- Converted Date column to Date type
- Cleaned columns: Units Sold, Sales, COGS, Profit, etc.
- Sorted Month Name by Month Number

## 8. Conclusion & Recommendations

- Monitor profit margin closely when applying discounts.
- Focus on high-profit products and top-performing countries.
- Plan seasonal marketing around months with consistent sales dips.