

Financial Analysis

Analysis of the dataset => Financial Excel sheet.

Dataset contains the financial information the product sales across the various countries and market segment and it tracks the details such as.,

Units sold

Discount

Discount Band (says that whether the discount is applied or not)

Manufacturing Price

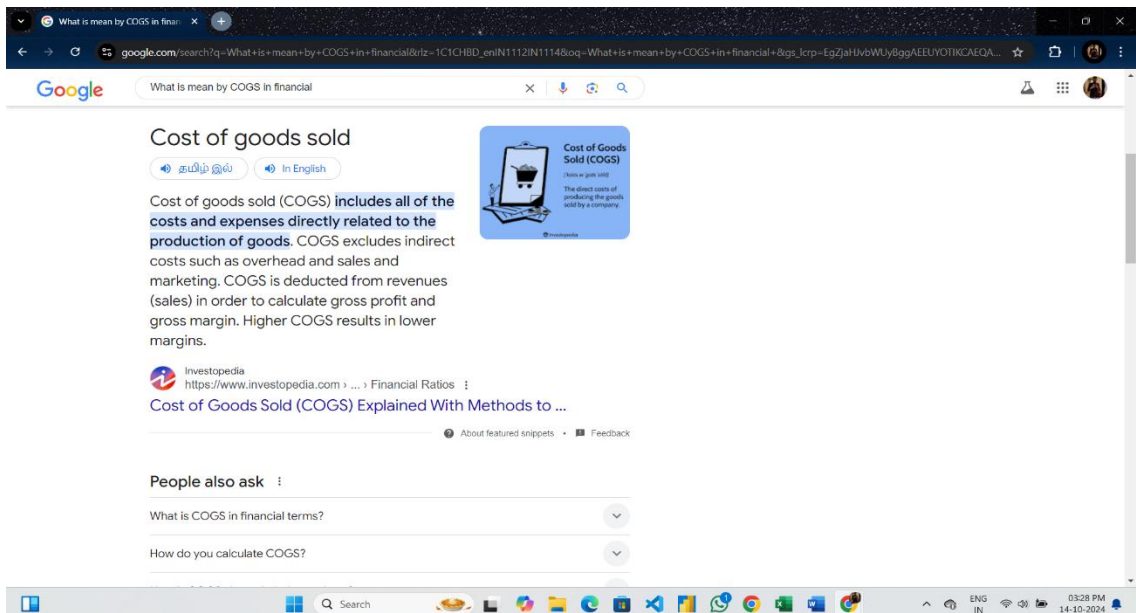
Sales Price

Gross Sales and profits

Like that and the dataset includes the COGS which is cost of goods sold in order to calculate the profit. For further it contains the date, Month name, and year which used to analysis by Quarter, year, or Month wise sales. The sales occur in the 2013 and 2014.

In this we can make the sales performance, segment by region, product, and market type wise to get the market behavior and sales trends over the year of time.

COGS Information:



The screenshot shows a Google search result for the query "What is mean by COGS in financial". The search bar at the top displays the query. Below the search bar, the title "Cost of goods sold" is shown in a large, bold font. To the right of the title is a small blue icon with a laptop and the text "Cost of Goods Sold (COGS)". Below the title, there is a paragraph explaining COGS: "Cost of goods sold (COGS) includes all of the costs and expenses directly related to the production of goods. COGS excludes indirect costs such as overhead and sales and marketing. COGS is deducted from revenues (sales) in order to calculate gross profit and gross margin. Higher COGS results in lower margins." Below this paragraph, there is a link to Investopedia: "https://www.investopedia.com > ... > Financial Ratios : Cost of Goods Sold (COGS) Explained With Methods to ...". At the bottom of the search results, there is a section titled "People also ask" with two questions: "What is COGS in financial terms?" and "How do you calculate COGS?". The bottom of the screenshot shows the Windows taskbar with various application icons and the system clock displaying "03:28 PM 14-10-2024".

Total and Average of Fields

Table Tools **Financial Sample - Excel** Jothi Prathap A

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Paste Cut Copy Format Painter Font Alignment Number Conditional Formatting Styles Cell Styles Insert Delete Format Cells AutoSum Fill Clear Sort & Find & Filter Select Add-ins

	Segment	Country	Product	Discount Band	Units Sold	Manufacturing	Sale Price	Gross Sales	Discounts	Sales	COGS	Profit	Date
685	Midmarket	France	Velo	High	2826	\$ 120.00	\$ 15.00	\$ 42,390.00	\$ 6,358.50	\$ 36,031.50	\$ 28,260.00	\$ 7,771.50	01-05-20
686	Enterprise	France	Velo	High	663	\$ 120.00	\$ 125.00	\$ 82,875.00	\$ 12,431.25	\$ 70,443.75	\$ 79,560.00	\$ (9,116.25)	01-09-20
688	Small Business	United States of America	Velo	High	2574	\$ 120.00	\$ 300.00	\$ 772,200.00	\$ 1,15,830.00	\$ 6,56,370.00	\$ 643,500.00	\$ 12,870.00	01-11-20
688	Enterprise	United States of America	Velo	High	2438	\$ 120.00	\$ 125.00	\$ 3,04,750.00	\$ 45,712.50	\$ 2,59,037.50	\$ 2,92,560.00	\$ (33,522.50)	01-12-20
689	Channel Partners	United States of America	Velo	High	914	\$ 120.00	\$ 12.00	\$ 10,968.00	\$ 1,645.20	\$ 9,322.80	\$ 2,742.00	\$ 6,580.80	01-12-20
690	Governement	Canada	VTT	High	865.5	\$ 250.00	\$ 20.00	\$ 17,310.00	\$ 2,596.50	\$ 14,713.50	\$ 8,655.00	\$ 6,058.50	01-07-20
691	Midmarket	Germany	VTT	High	492	\$ 250.00	\$ 15.00	\$ 7,380.00	\$ 1,107.00	\$ 6,273.00	\$ 4,920.00	\$ 1,353.00	01-07-20
692	Governement	United States of America	VTT	High	267	\$ 250.00	\$ 20.00	\$ 5,340.00	\$ 801.00	\$ 4,539.00	\$ 2,670.00	\$ 1,869.00	01-10-20
693	Midmarket	Germany	VTT	High	1175	\$ 250.00	\$ 15.00	\$ 17,625.00	\$ 2,643.75	\$ 14,981.25	\$ 11,750.00	\$ 3,231.25	01-10-20
694	Enterprise	Canada	VTT	High	2954	\$ 250.00	\$ 125.00	\$ 3,69,250.00	\$ 55,387.50	\$ 3,13,862.50	\$ 3,54,480.00	\$ (40,617.50)	01-11-20
695	Enterprise	Germany	VTT	High	592	\$ 250.00	\$ 125.00	\$ 69,000.00	\$ 10,350.00	\$ 58,650.00	\$ 66,240.00	\$ (7,590.00)	01-11-20
696	Governement	France	VTT	High	253	\$ 250.00	\$ 20.00	\$ 5,860.00	\$ 879.00	\$ 4,981.00	\$ 2,930.00	\$ 2,051.00	01-12-20
696	Small Business	France	Amarilla	High	2475	\$ 260.00	\$ 300.00	\$ 7,42,500.00	\$ 1,13,375.00	\$ 6,31,125.00	\$ 6,18,750.00	\$ 12,375.00	01-09-20
698	Small Business	Mexico	Amarilla	High	546	\$ 260.00	\$ 300.00	\$ 1,63,800.00	\$ 24,570.00	\$ 1,39,230.00	\$ 1,36,500.00	\$ 2,730.00	01-10-20
699	Governement	Mexico	Montana	High	1368	\$ 5.00	\$ 7.00	\$ 9,576.00	\$ 1,436.40	\$ 8,139.60	\$ 6,840.00	\$ 1,299.60	01-02-20
700	Governement	Canada	Paseo	High	723	\$ 10.00	\$ 7.00	\$ 5,061.00	\$ 759.15	\$ 4,301.85	\$ 3,615.00	\$ 686.85	01-04-20
701	Channel Partners	United States of America	VTT	High	1806	\$ 250.00	\$ 12.00	\$ 21,672.00	\$ 3,250.80	\$ 18,421.20	\$ 5,418.00	\$ 13,003.20	01-05-20
702	Total				\$ 11,25,806.00	\$ 67,534.00	\$ 82,900.00	\$ 12,79,31,598.50	\$ 92,05,248.24	\$ 11,87,26,350.26	\$ 10,18,32,648.00	\$ 1,68,93,702.26	
703	Average				\$ 1,608.29	\$ 96.48	\$ 118.43	\$ 1,82,759.43	\$ 13,150.35	\$ 1,69,609.07	\$ 1,45,475.21	\$ 24,133.86	

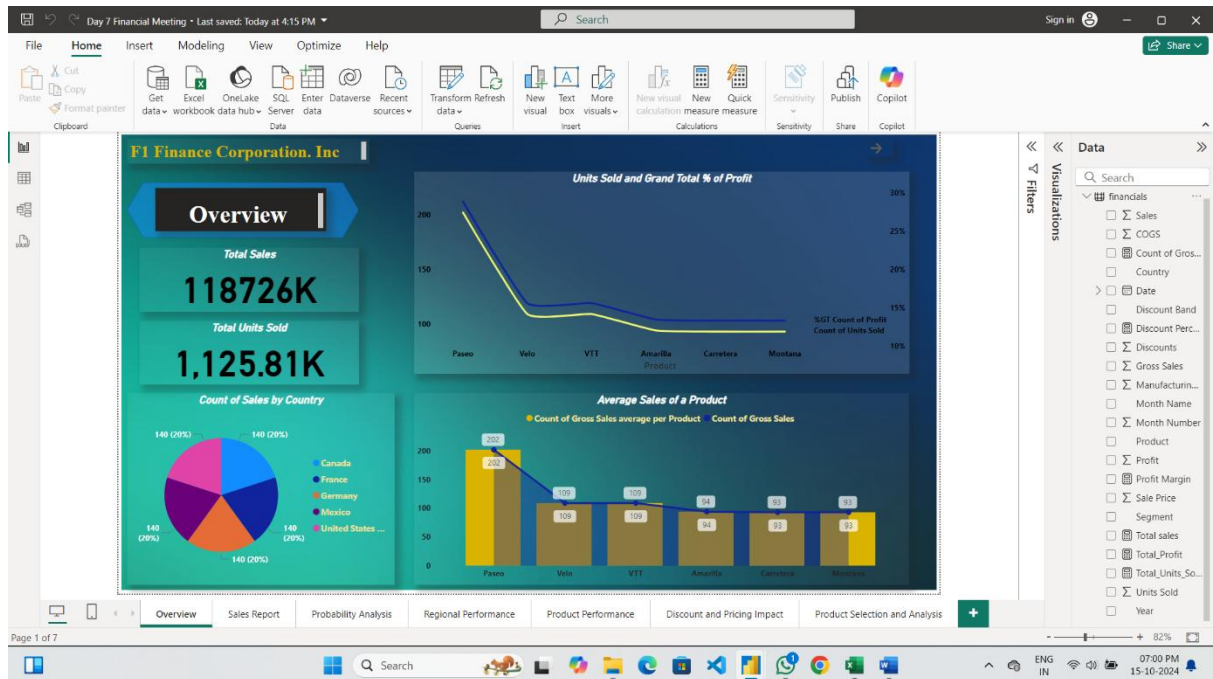
Sheet1 Accessibiility: Investigate

Ready ENG IN 03:40 PM 14-10-2024

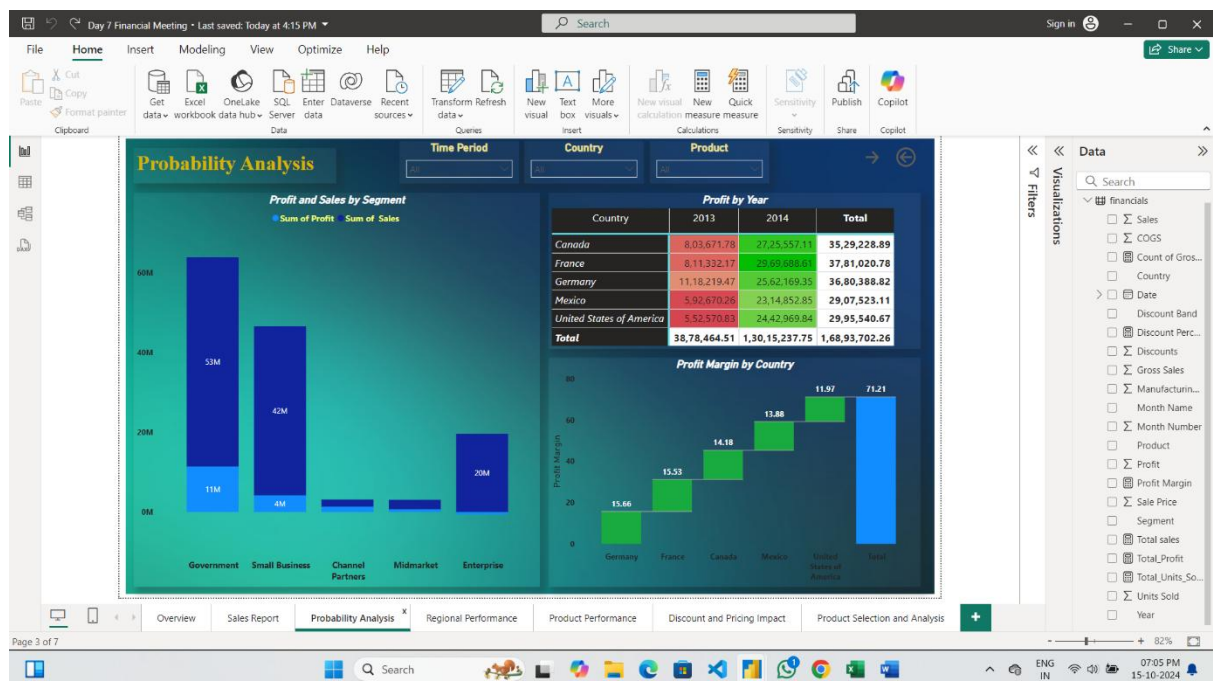
Using the financial sample data set need to prepare a Power bi dashboard for financial statement for an MNC company.

Financial Analysis Dashboard:

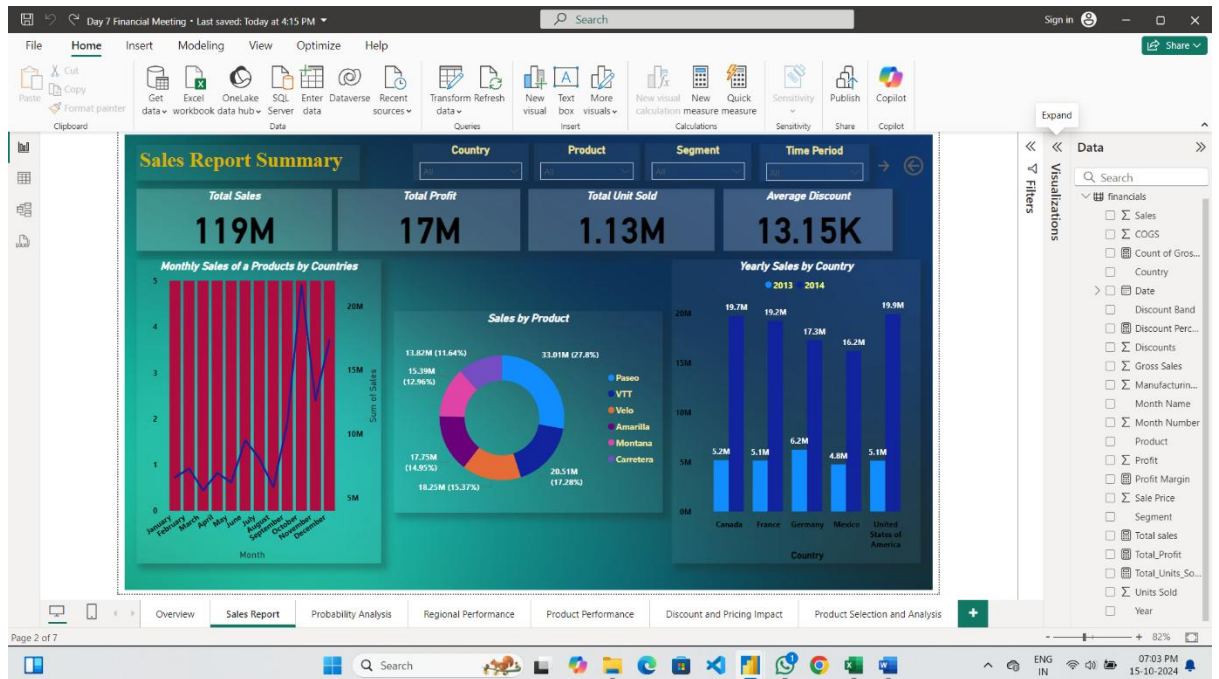
Overview



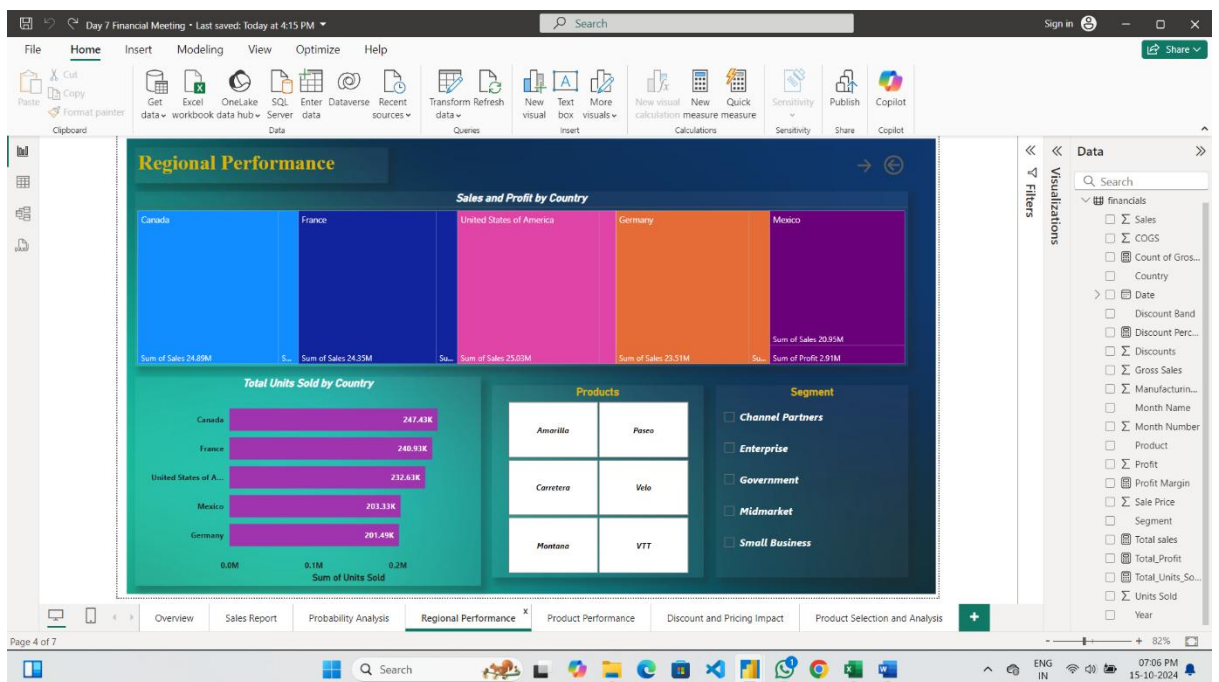
Probability Analysis



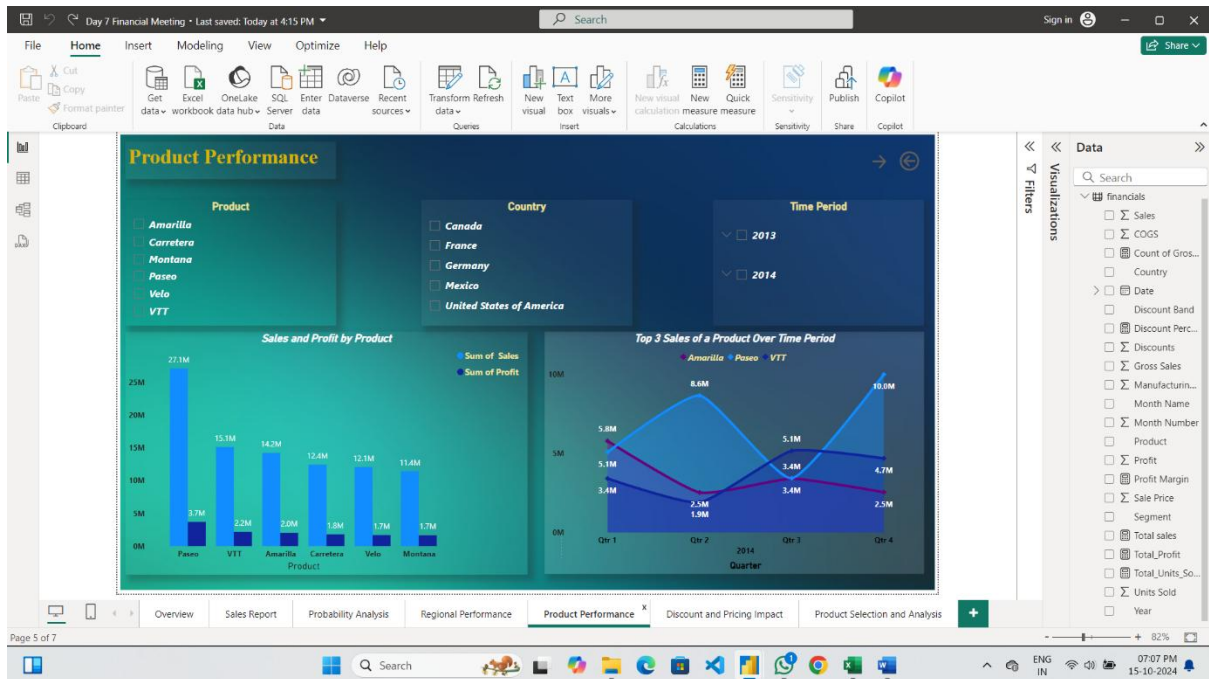
Sales Report



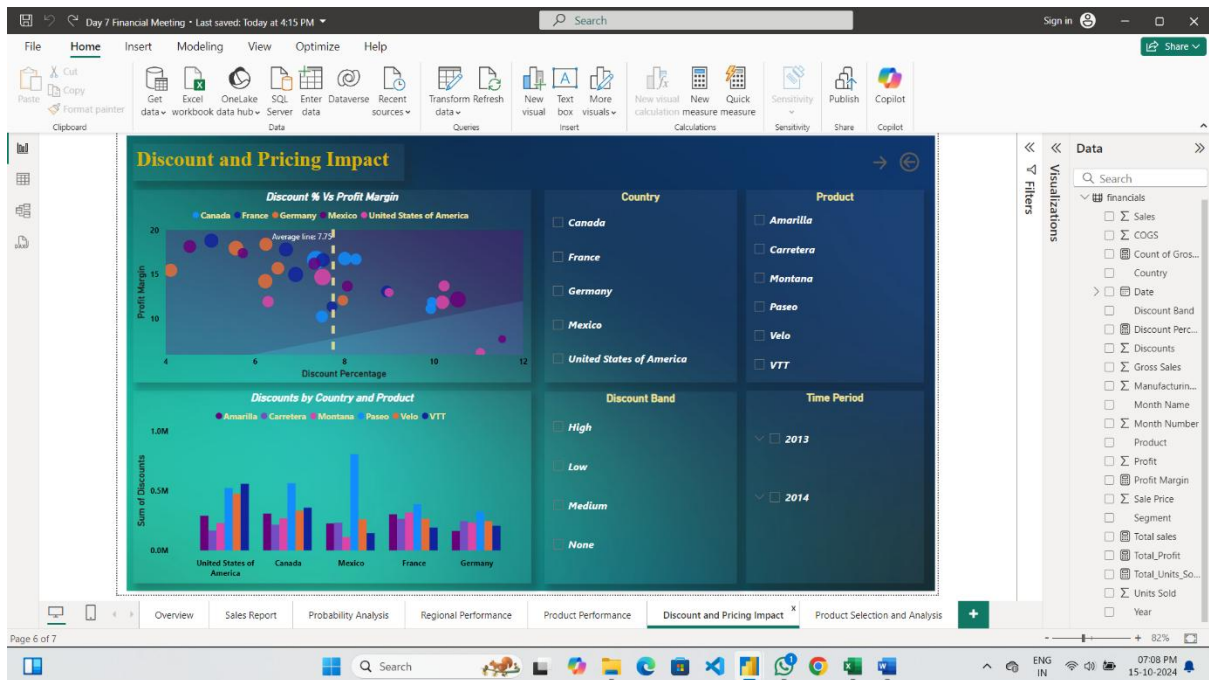
Regional Performance



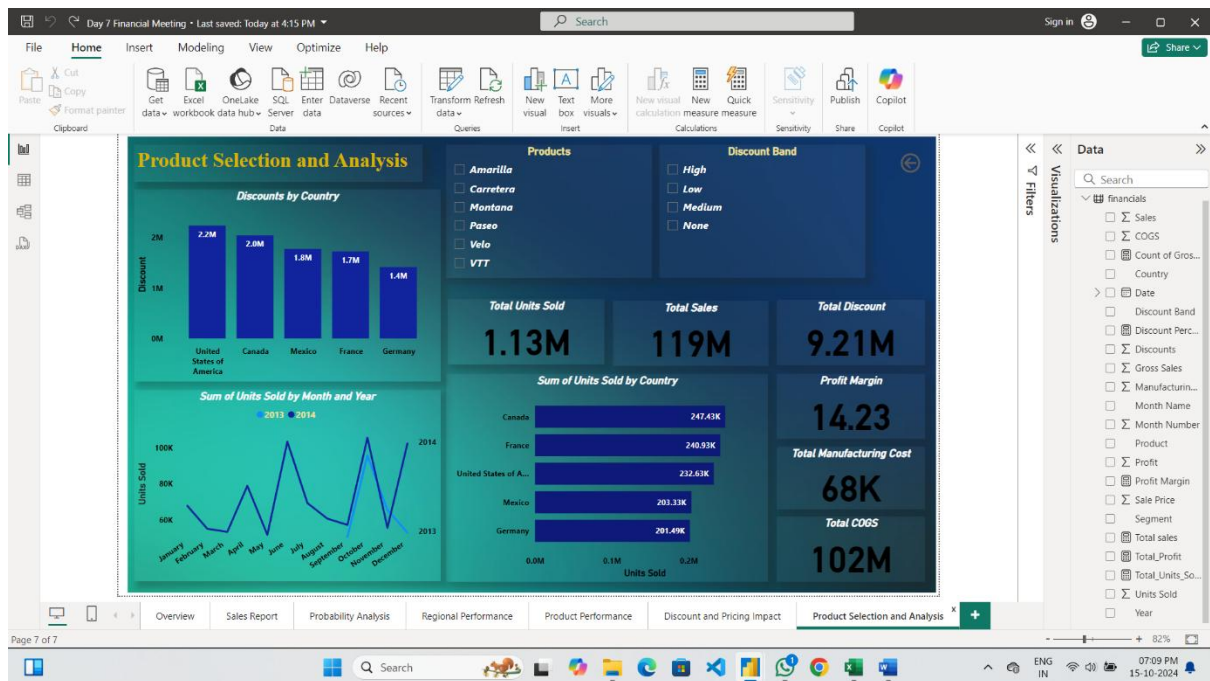
Product Performance



Discount and Pricing Impact



Product Selection and Analysis (For Particular/Single Product)



For Making these dashboards used common one but in discount and pricing impact there is a usage of the **Scatter Plot** which is used to identify the trend which is used to get the relationship between discount and profit.


And there is usage of **DAX Formulas** which is used to identify the profit margin and Discount Percentage.

DAX Formulas:

Profit Margin and Discount Percentage


Profit Margin = $\text{DIVIDE}(\text{SUM}(\text{'financials' [Profit]}), \text{SUM}(\text{'financials' [Sales]}), 0) * 100$

Discount Percentage = DIVIDE(SUM('financials'[Discount]), SUM('financials'[Sales]), 0) *100

 Microsoft

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CST

v-jialongy-msft

Community Support

05-07-2024 06:59 PM

 Hi @Gwendolyn

Let's address each of your queries step by step.


1.Calculating Discount Percentage

To calculate the discount percentage, you can create a new measure in Power BI. This measure will dynamically calculate the discount percentage based on your sales data. Here's how you can do it:

- Go to the Modeling tab in Power BI Desktop.
- Click on New Measure.
- Enter the following DAX formula for your new measure:

Discount Percentage = DIVIDE([Discount Amount], [Original Sales Amount])

Replace "[Discount Amount]" and "[Original Sales Amount]" with the actual column names from your dataset that represent the discount amount and the original sales amount before discount, respectively.

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1. Total Revenue = SUMX(Sales, Sales[Order qty] * Sales[unit price])

2. Total Cost = SUMX(Sales, Sales[Order qty] * Sales[unit cost])

3. Total Profit = [Total Revenue]-[Total Cost]

4. Profit Margin = DIVIDE([Total Profit], [Total Revenue], 0)

However, when I show profit margin in a visual, all of the items in the category have the same profit margin. Any suggestions?

State Code	Total Revenue	Total Cost	Profit Margin
CA	\$8,905,982	\$6,361,416	28.6%
TX	\$4,598,705	\$3,284,789	28.6%
IL	\$3,655,157	\$2,610,827	28.6%
FL	\$2,894,004	\$2,067,145	28.6%
NY	\$2,538,968	\$1,813,549	28.6%
IN	\$1,587,358	\$1,133,827	28.6%
CO	\$1,505,652	\$1,075,466	28.6%
AZ	\$1,297,449	\$926,750	28.6%
CT	\$1,230,929	\$879,235	28.6%
NC	\$1,067,400	\$762,429	28.6%
VA	\$998,057	\$712,898	28.6%
NV	\$988,710	\$706,221	28.6%
WA	\$909,523	\$649,659	28.6%
GA	\$903,209	\$645,150	28.6%
MI	\$810,224	\$578,731	28.6%
NJ	\$786,258	\$561,613	28.6%
TN	\$700,550	\$500,393	28.6%
MO	\$672,819	\$480,585	28.6%
KS	\$658,821	\$470,586	28.6%
Total	\$44,365,028	\$31,689,306	28.6%