

Power BI – Financial performance

Context

My first PowerBI visualisation – a single, flat table.

Brief description

5 views of bike sales performance (overview, by product, segment, country, and a highlighted root cause for losses).

URL

[FinancialSample.xlsx](#) (Microsoft sample data)

16.9M

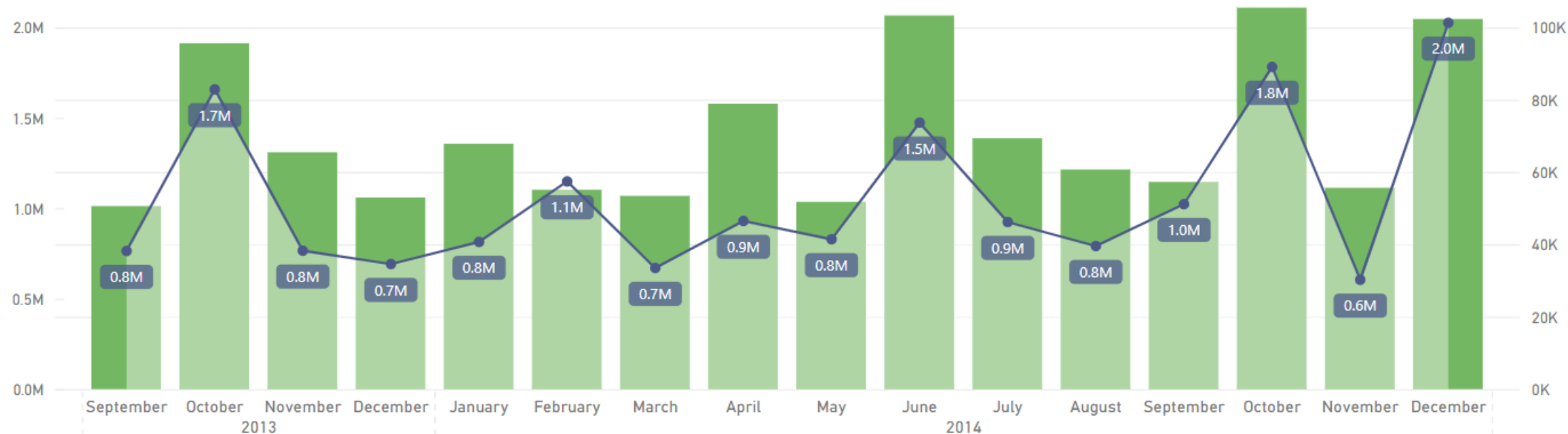
Sum of Profit

Overview

1.1M

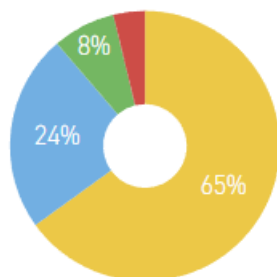
Sum of Units Sold

● Sum of Units Sold — Sum of Profit



Share by segment

- Government
- Small Business
- Channel Partners
- Midmarket
- Enterprise

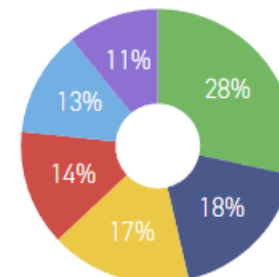


Country

- Canada
- France
- Germany
- Mexico
- United States of America

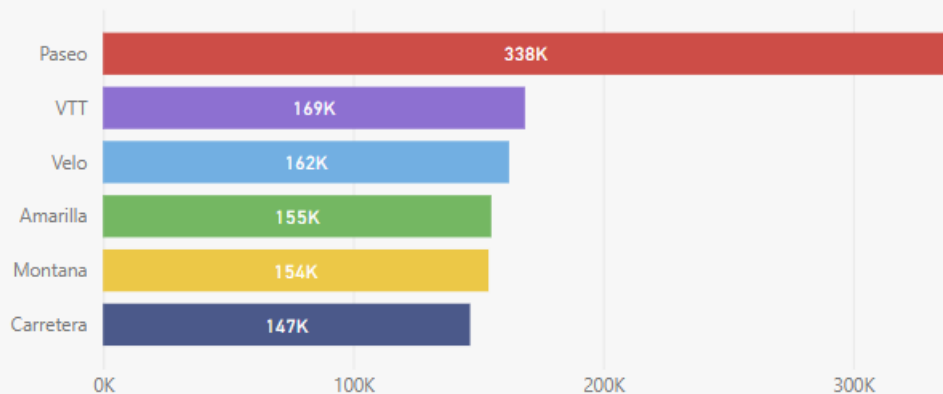
Share by product

- Paseo
- VTT
- Amarilla
- Velo
- Montana
- Carretera



Products

Units sold



1.1M

Sum of Units Sold

118.4

Average of Sale Price

94.0

Average of Unit COGS

Country

- ☐ Canada
- ☐ France
- ☐ Germany
- ☐ Mexico
- ☐ United States of A...

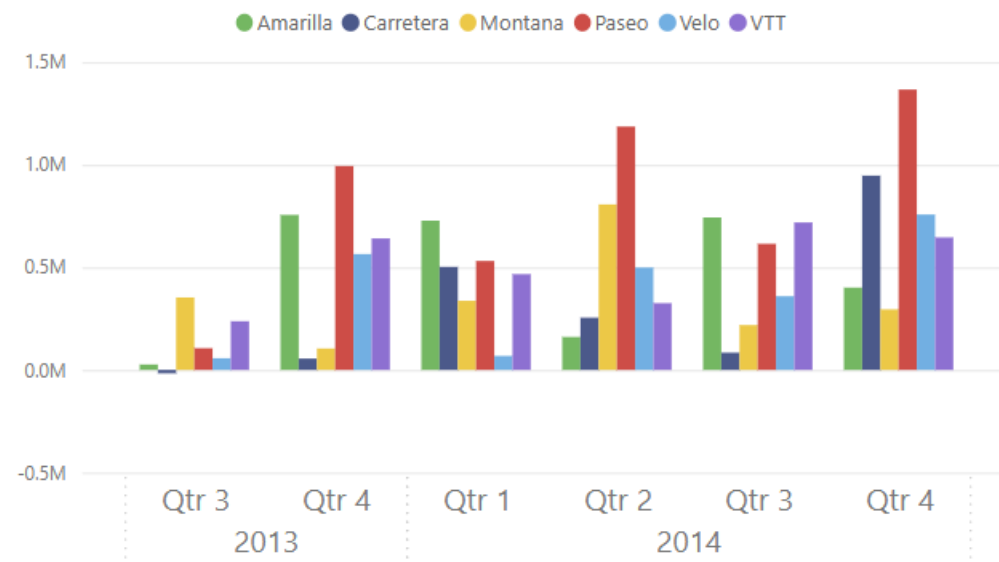
Product

- ☐ Amarilla
- ☐ Carretera
- ☐ Montana
- ☐ Paseo
- ☐ Velo
- ☐ VTT

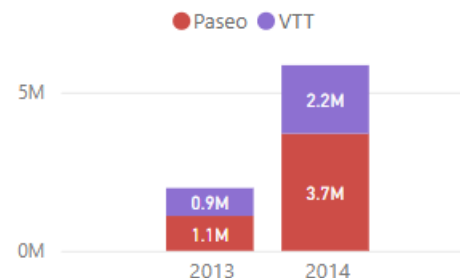
Segment

- ☐ Channel Partners
- ☐ Enterprise
- ☐ Government
- ☐ Midmarket
- ☐ Small Business

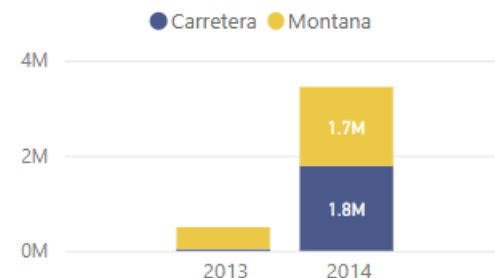
Profit timeline



Top products

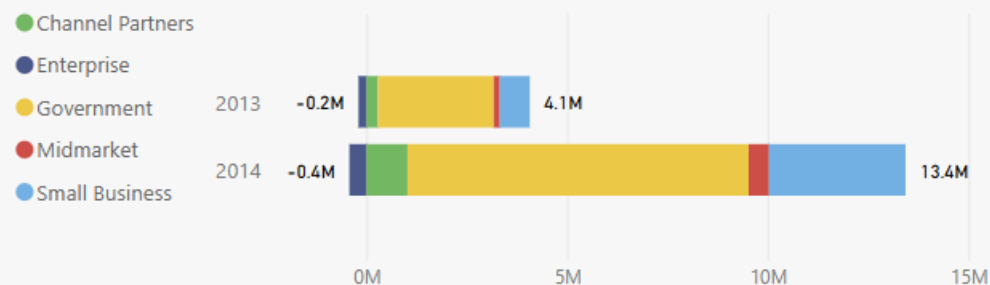


Bottom products

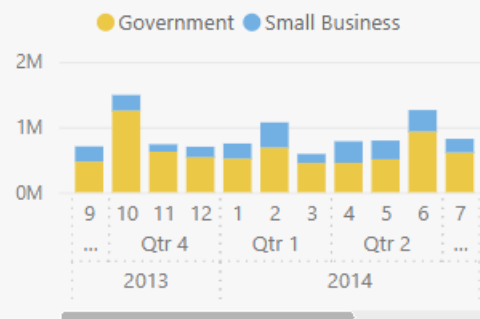


Segments

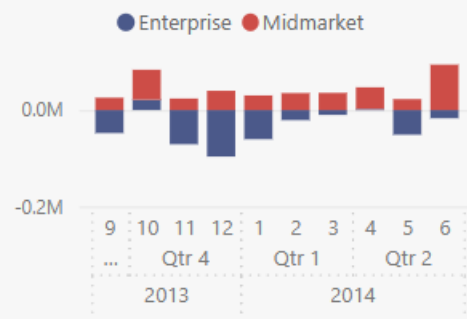
Profit by segment



Top segments



Bottom segments



Country

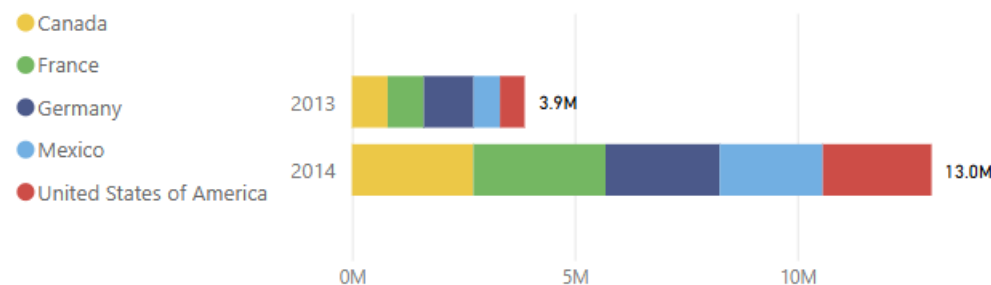
- ☐ Canada
- ☐ France
- ☐ Germany
- ☐ Mexico
- ☐ United States of A...

16.9M

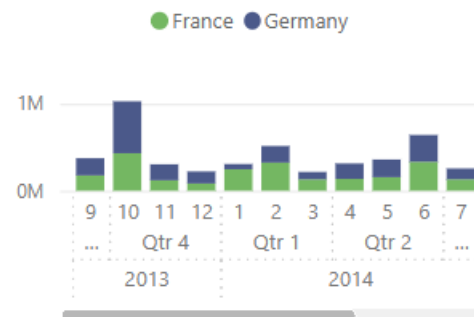
Sum of Profit

Countries

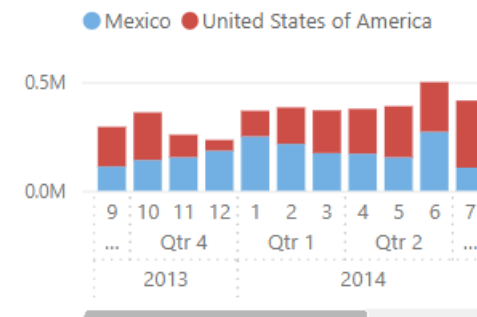
Profit by country



Top countries



Bottom countries



Segment

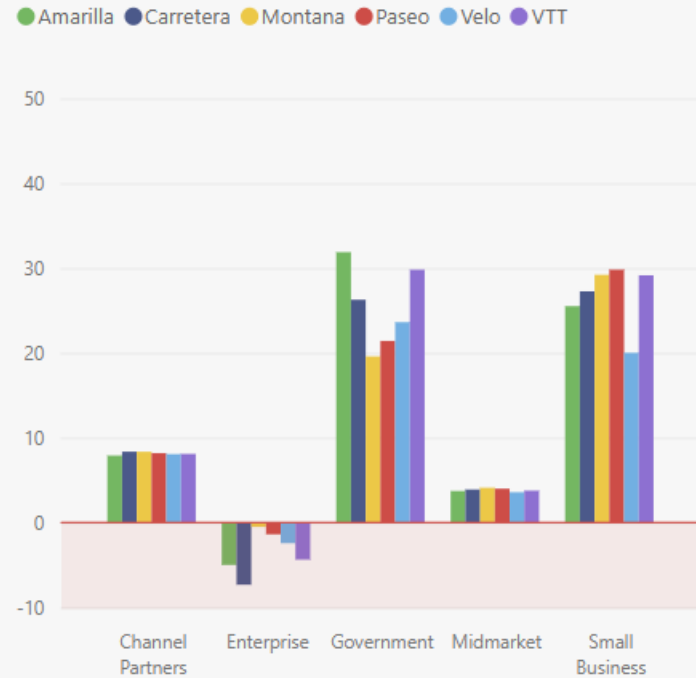
- ☐ Channel Partners
- ☐ Enterprise
- ☐ Government
- ☐ Midmarket
- ☐ Small Business

118.7M

Sum of Sales

Discounts

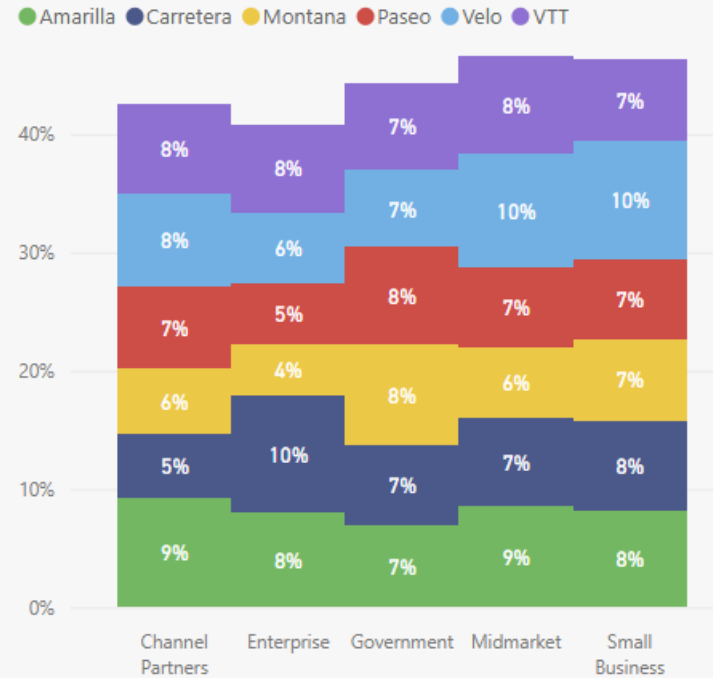
Gross margin (discounted)



15.80

Average of Gross_Margin_Discounted

Discounts offered



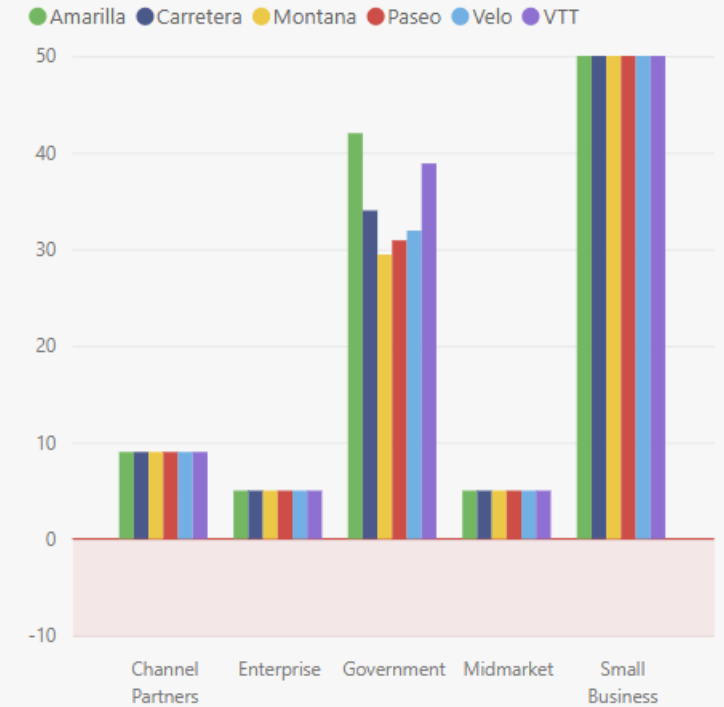
Country

- ☐ Canada
- ☐ France
- ☐ Germany
- ☐ Mexico
- ☐ United States of A...

Product

- ☐ Amarilla
- ☐ Carretera
- ☐ Montana
- ☐ Paseo
- ☐ Velo
- ☐ VTT

Gross margin (0% discount)



24.43

Average of Gross_Margin_NoDiscount

Loss mechanism example

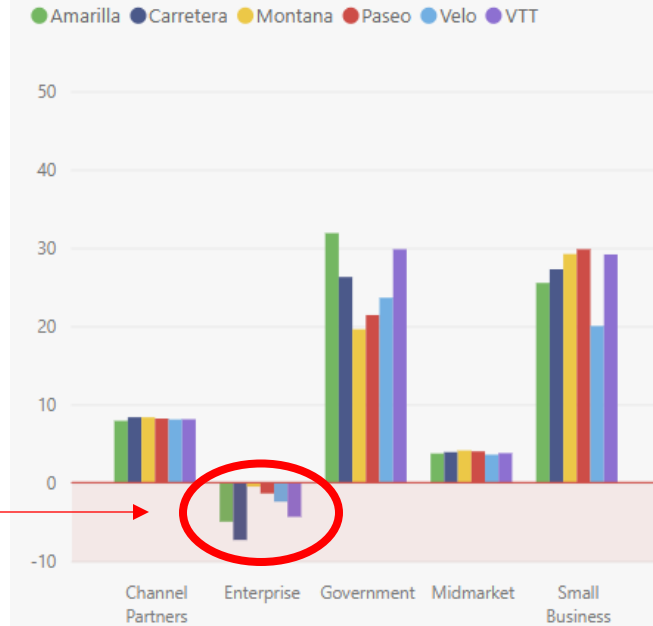
For enterprises, merged discount rates are already lowest, so no bias there.

However, enterprises have the worst margin, and abnormally high discounts on Carreteras.

Therefore, for this segment, consider:

- **More affordable manufacturing options**
- **Lower discounts** (priority: Carretera, Amarilla, VTT)

Gross margin (discounted)



Discounts offered

