


Project Report: Personal Finance Dashboard

Project Title:

 *Personal Finance Dashboard using Microsoft Excel*

Overview:

This project presents an interactive **Excel-based financial dashboard** designed to monitor and analyze income, expenses, and spending categories across different months and years. Using **pivot tables, data visualization, and slicers**, the dashboard enables users to make data-driven financial decisions with ease and clarity.

Objectives:

- To organize financial data efficiently using structured Excel tables.
 - To visualize income and expense trends over time.
 - To identify key spending categories and track monthly performance.
 - To calculate available balance and compare yearly financial summaries.
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Key Insights & Findings:

- **Total Income:** \$698,147
 - **Total Expense:** \$149,853
 - **Available Balance:** \$848,000
 - The **“Other” category** accounted for the largest portion of spending (\$750,316).
 - **January** recorded the highest overall financial activity (\$81,219).
 - **2022** contributed the most to overall financial movement (\$753,495 compared to \$94,505 in 2021).
 - Consistent monthly spending patterns were observed with minimal fluctuations between \$63,000 and \$75,000.
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Dashboard Components:

1. **Income & Expense Line Chart:** Shows monthly trends to compare financial inflow and outflow.
 2. **Spending by Category Cards:** Visual summary of five main categories — Allowance, Education, Household, Other, and Transportation.
 3. **Year-by-Amount Donut Chart:** Compares total financial data for 2021 and 2022.
 4. **Available Balance Summary:** Displays remaining funds after total expenses.
 5. **Monthly Filter (Slider):** Allows dynamic data exploration by month.
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Tools & Techniques Used:

- **Microsoft Excel** (Pivot Tables, Charts, Slicers, Conditional Formatting)
 - **Data Cleaning** and formatting for structured analysis.
 - **Interactive Dashboard Design** using modern Excel visualization techniques.
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Outcome:

The dashboard provides a **clear, dynamic view of financial performance**, helping users manage budgets, track expenses, and identify savings opportunities. It serves as a practical model for anyone seeking to transform raw financial data into actionable insights using Excel.

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<https://github.com/NoreenVizLogix/Personal-Finance-Dashboard-Excel>