Project Title	**Finance Performance Analysis**
Tools	Power BI, MS Excel, DAX
Technologies	Business Analyst
Project Difficulties Level	Intermediate

Dataset: The dataset is available in the given link.

[Dataset Link](#)

Project Overview

To analyze global financial metrics across segments and countries using Power BI to provide stakeholders with actionable business insights.

About Dataset Content

Key Columns in the Dataset:

Segment: The market sector (Government, Midmarket, Channel Partners, Enterprise, Small Business).

Country: Geographic location of the sales (Canada, Germany, France, Mexico, USA).

Product: The name of the product sold (e.g., Paseo, VTT, Montana).

Discount Band: Categorization of discounts applied (None, Low, Medium, High).

Units Sold: The total quantity of units sold per transaction.

Manufacturing Price: The cost to manufacture a single unit.

Sale Price: The price at which the product was sold to the customer.

Gross Sales: The total sales before any discounts (Units Sold * Sale Price).

Discounts: The total amount of money deducted from gross sales.

Sales: The net revenue after discounts are applied.

COGS: The total direct costs of producing the units sold.

Profit: The final earnings after subtracting COGS and discounts.

Date / Month / Year: Temporal data used for trend analysis over time.

Power BI Code

1. Top Layer

KPI Cards

These three measures provide the big numbers at the top of your report.

Total Units Sold:

Code snippet

Total Units Sold = SUM('financial_data'[Units Sold])

(Displays 1.13M on your dashboard)

Total Gross Sales:

Code snippet

Total Gross Sales = SUM('financial_data'[Gross Sales])

(Displays $127.93M on your dashboard)

Total Profit:

Code snippet

Total Profit = SUM('financial_data'[Profit])

(Displays $16.89M on your dashboard)

2. Middle Layer

Key Charts

These charts break down the performance by category and geography.

- **Sum of Profit by Segment (Waterfall Chart):**

    Logic: This uses the Total Profit measure.

    DAX: Profit by Segment = SUM('financial_data'[Profit])

    Visual Setup: Drag Segment to Category and Profit to Values.

- **Sum of Sales by Country (Bar Chart):**

    Logic: This shows which regions are generating the most revenue.

    DAX: Sales by Country = SUM('financial_data'[Sales])

    Visual Setup: Drag Country to the Y-Axis and Sales to the X-Axis.

- **Sum of Profit by Segment (Clustered Bar Chart):**

    Logic: A direct comparison of profit across the 5 business segments.

    Visual Setup: Y-Axis: Segment, X-Axis: Profit.

3. Bottom Layer

Slicers

To make the dashboard interactive like the "Pizza Sales" example, use these fields in Slicer visuals:

- **Country Slicer:** Use the Country column.

- **Product Slicer:** Use the Product column.

Dashboard Creation

Load the Dataset

1. Open Power BI Desktop.

2. Click Get Data > Text/CSV.

3. Select your financial_data.csv file and click Open.

4. In the preview window, click Load.

Create the KPI Cards (Top Row)

These show the high-level numbers ($118.73M, etc.).

1. Select Visual: Click the Card icon (looks like a 123 box) in the Visualizations pane.

2. Add Field: Drag the Sales column into the Fields bucket.

3. Repeat: Do this two more times for Profit (Total Profit) and Units Sold (Total Units Sold).

Create the "Sum of Profit by Segment"

This is the colorful chart on the left.

1. Select Visual: Click the Waterfall chart icon.

2. Add Category: Drag the Segment column into the Category bucket.

3. Add Values: Drag the Profit column into the Values bucket.

4. Formatting: Power BI will automatically color-code the "Increases" (Green) and "Total" (Blue).

Create the "Sum of Sales by Country"

1. Select Visual: Click the Clustered bar chart icon (horizontal bars).

2. Y-Axis: Drag the Country column here.

3. X-Axis: Drag the Sales column here.

4. Sort: Click the three dots ... on the chart and select Sort axis > Sales to ensure the highest sales are at the top.

Create the "Sum of Profit by Segment"

1. Select Visual: Click the Clustered bar chart icon again.

2. Y-Axis: Drag the Segment column here.

3. X-Axis: Drag the Profit column here.

Add Interactive Filters (Slicers)

1. Select Visual: Click the Slicer icon (looks like a funnel/filter).

2. Field: Drag the Country column into it.

3. Repeat: Create another Slicer and drag the Product column into it.

4. Settings: In the "Format" pane, change the slicer style to Dropdown to save space.
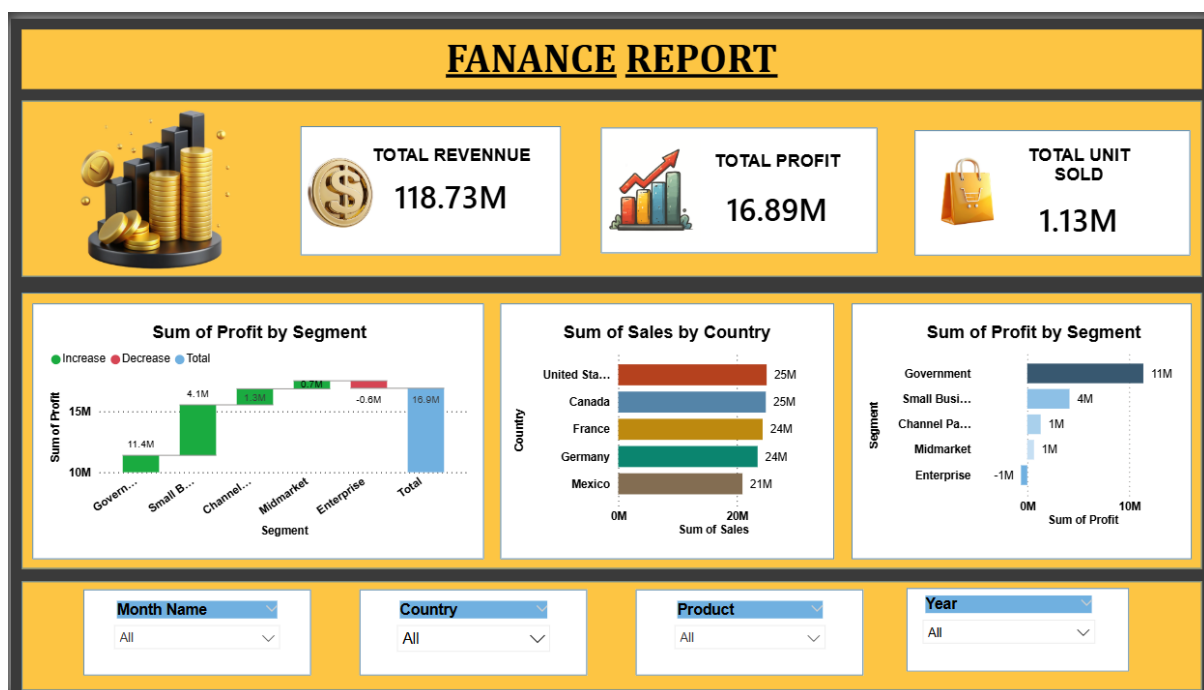
Save & Share

Go to File > Save.

Conclusion:

This dashboard successfully transforms raw financial data into actionable insights, identifying the United States market and the Small Business/Government segments as the primary drivers of growth. By centralizing these KPIs and implementing interactive filtering, the report empowers stakeholders to optimize global sales strategies and improve overall profitability through data-driven decision-making.
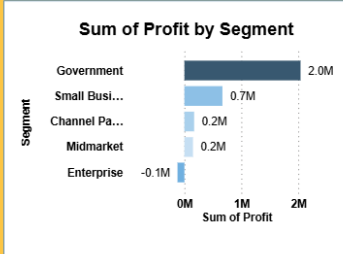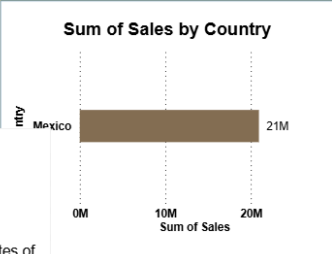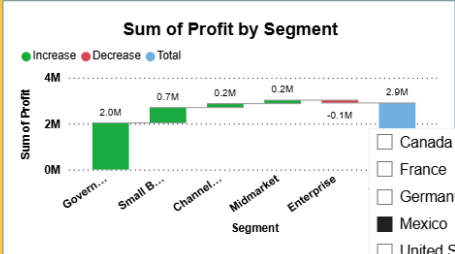
Output

Home Page

FANANCE REPORT

TOTAL REVENNUE
20.95M

TOTAL PROFIT
2.91M

TOTAL UNIT SOLD
203....

Sum of Profit by Segment

- Increase
- Decrease
- Total

Sum of Profit

2.0M	
0.7M	
0.2M	
0.2M	
-0.1M	
2.9M	

Govern... | Small B... | Channel... | Midmarket | Enterprise

Segment

Sum of Sales by Country

Mexico 21M

0M   10M   20M

Sum of Sales

Filter list:
- ☐ Canada
- ☐ France
- ☐ Germany
- ☑ Mexico
- ☐ United States of…

Sum of Profit by Segment

Segment	Sum of Profit
Government	2.0M
Small Busi...	0.7M
Channel Pa...	0.2M
Midmarket	0.2M
Enterprise	-0.1M

0M   1M   2M

Sum of Profit

Month Name
All

Mexico

Product
All

Year
All