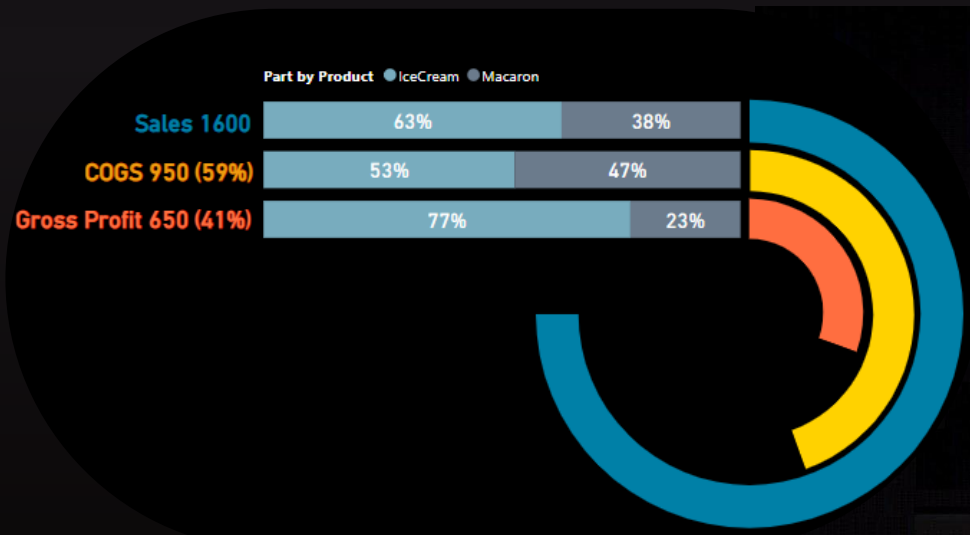
Easy to do it...

Patou Tips #5

Create a Customized Chart
(for income statement)

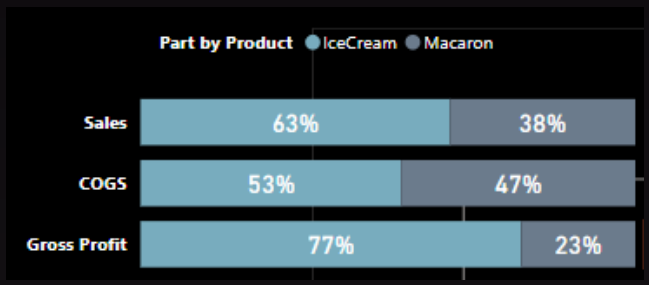


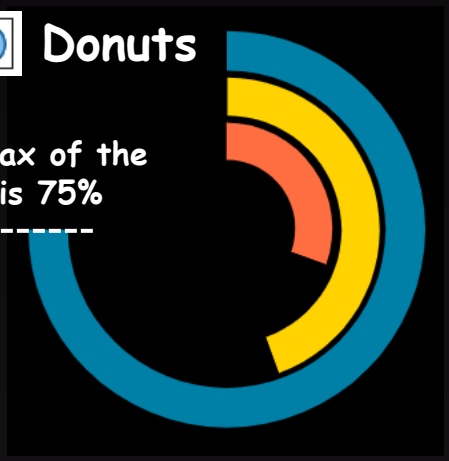
To practice
downloadable free
resources in GitHub

0 About this Chart and the data set…

This graphic is really useful to display the repartition of dimension variable as product, customer by category result, here by income statement.

Stacked Bar Chart + Donuts





Data set

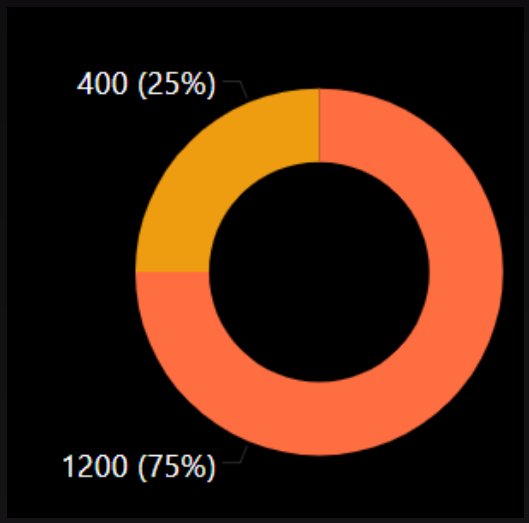
Income Statement	Product	Value
Sales	IceCream	1000
Sales	Macaron	600
COGS	IceCream	500
COGS	Macaron	450
Gross Profit	IceCream	500
Gross Profit	Macaron	150

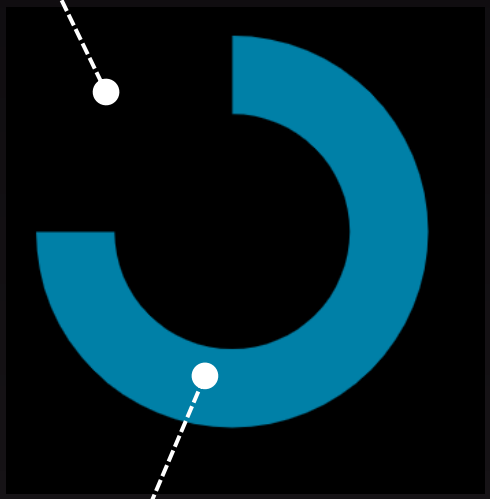
Data set come from the fictitious company based on Paris "IceCream' Macaron" from my book "Story of a point"

1 Create a donut…

Erase detail label and put the 25% area in the same the color like the background (here in black)

```
Graph Value blank =
VAR Max_Value = CALCULATE(SUM(Data[Value]),Data[Income Statement]="Sales")
RETURN Max_Value-[Graph Value]
```

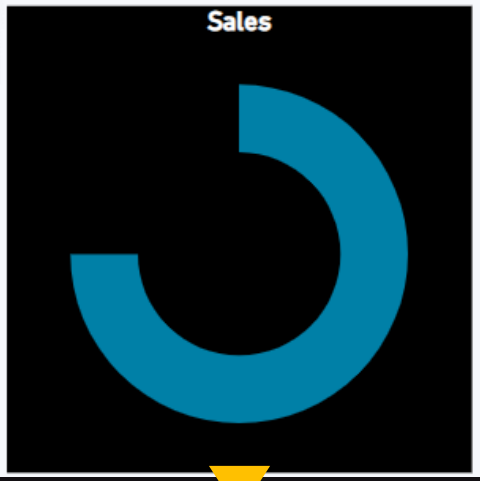


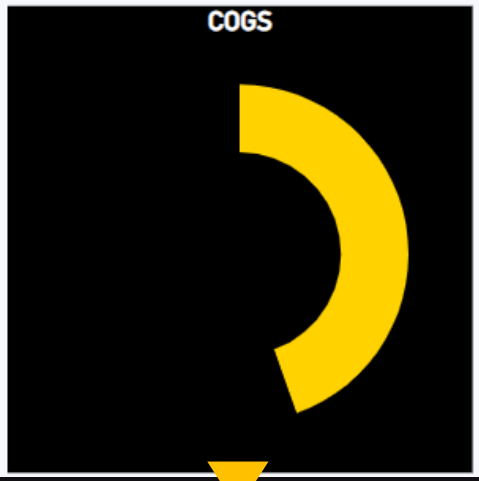


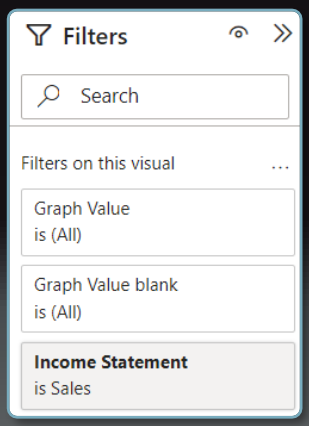
```
Graph Value =
CALCULATE(SUM(Data[Value]))*0.75
```

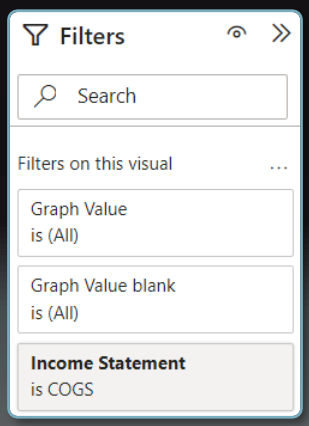
2 Create a donut for each category…

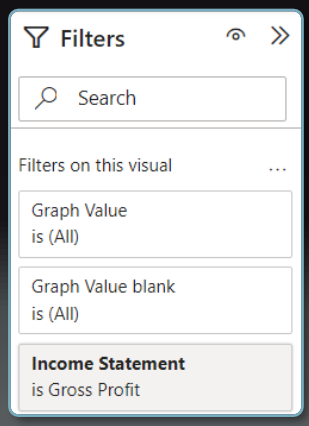
Assign the right filter (income statement) at each donut by the "filters panel"





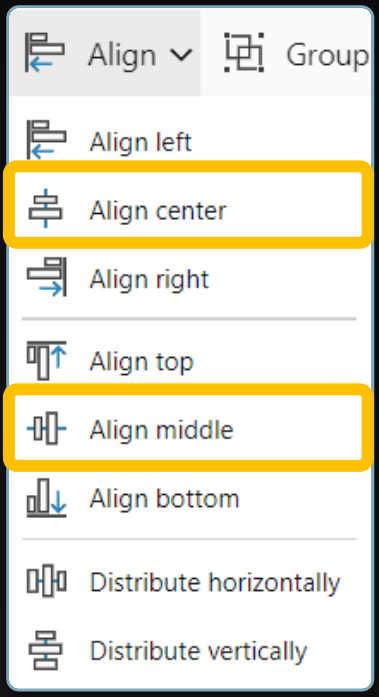


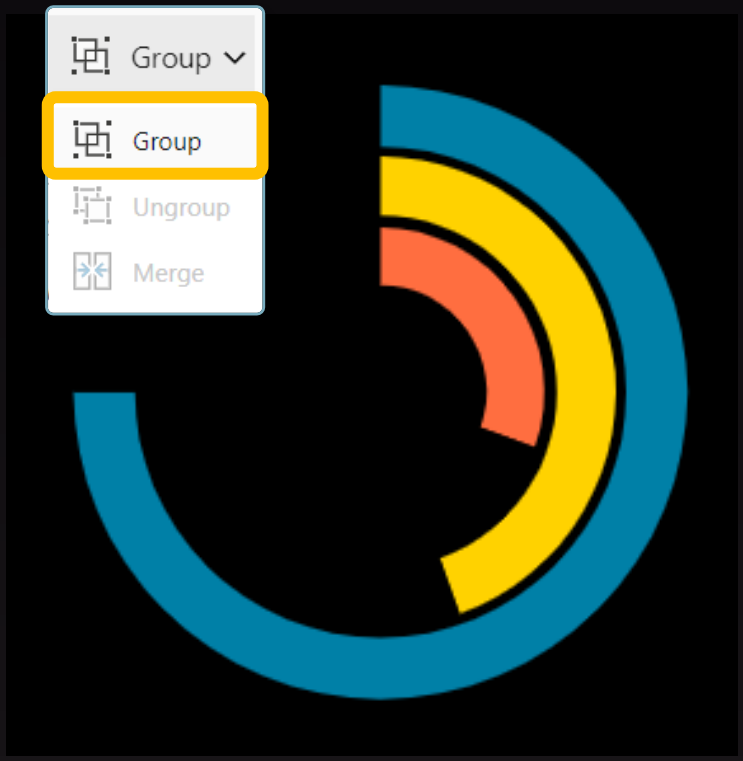




3 Bring together the donuts…

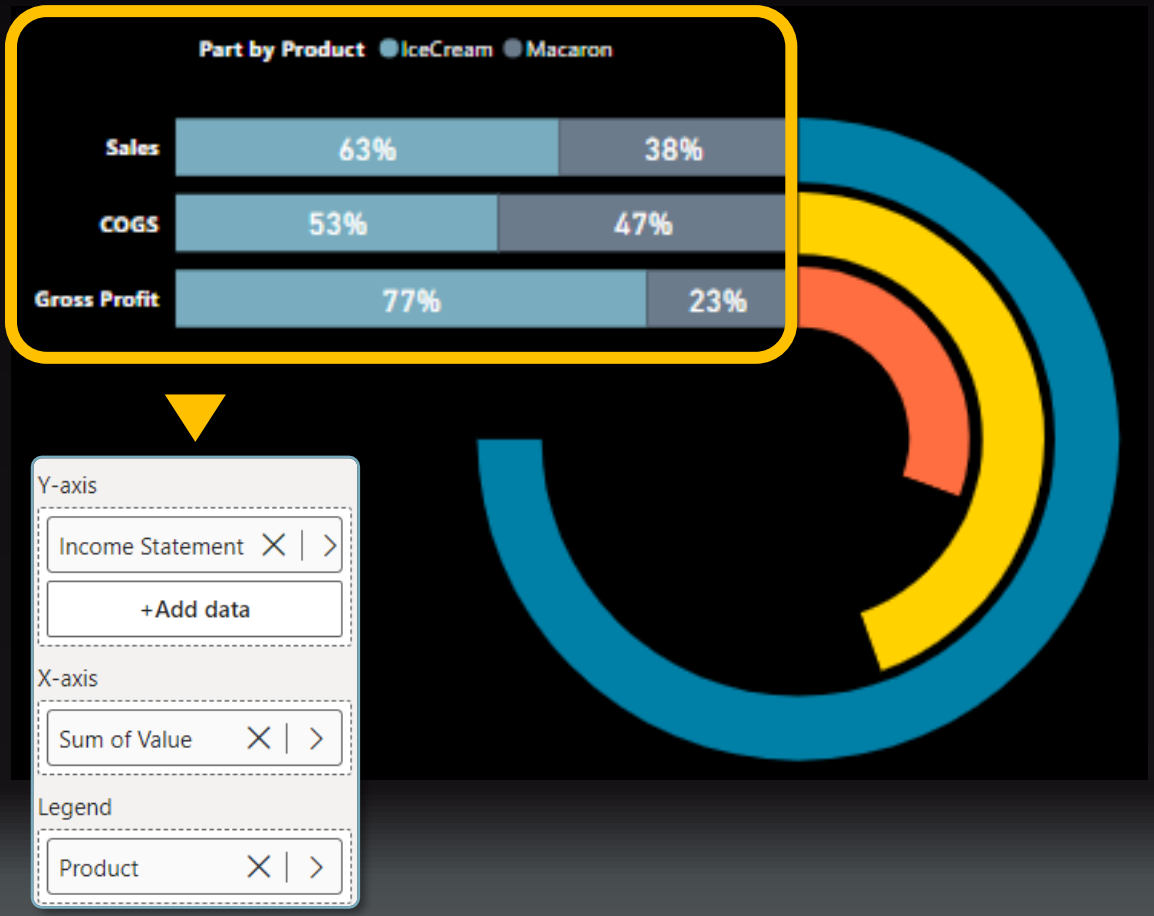
Align all the donuts by the center and by the middle and group it





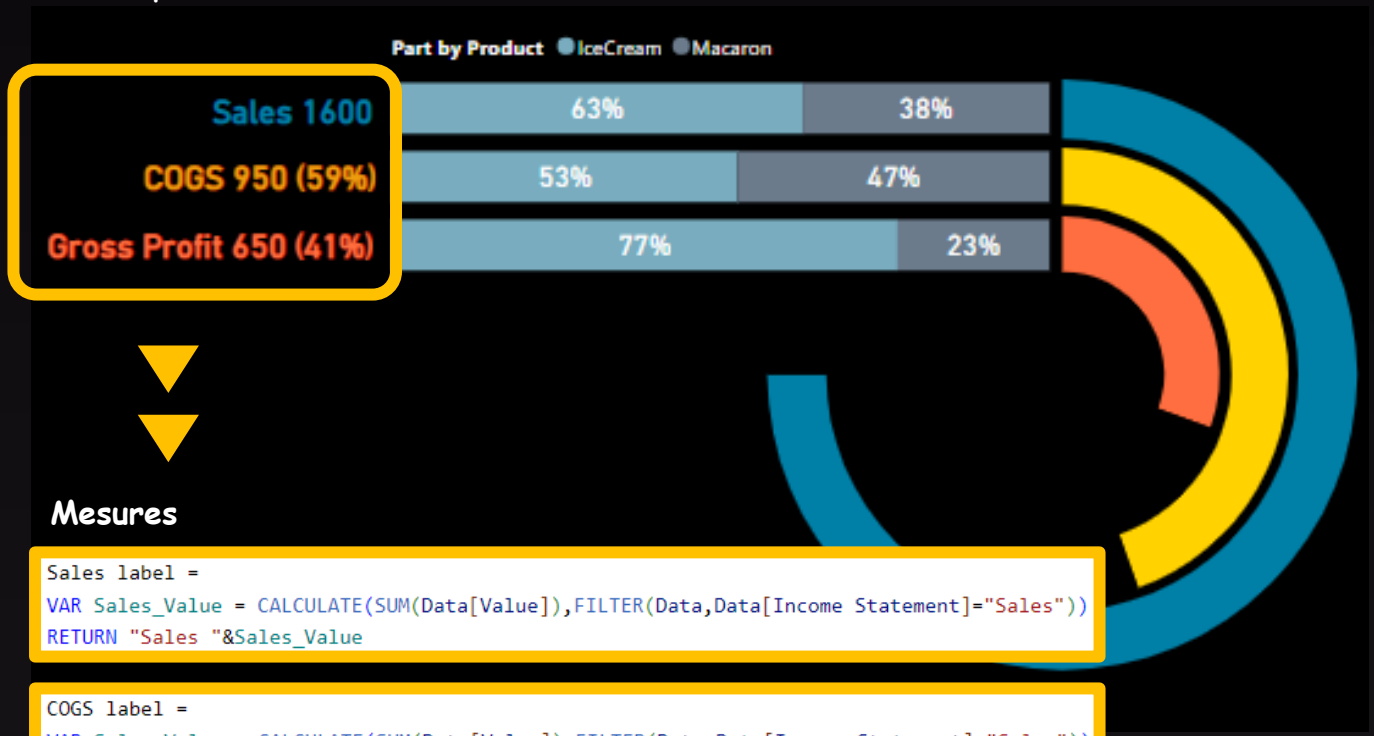
4 Create a "stacked bar chart"...

Create a "stacked bar chart" for the income statement distribution for each product



5 Create main labels, and it's finish!

Create a "stacked bar chart" for the income statement distribution for each product



Mesures

```
Sales label =
VAR Sales_Value = CALCULATE(SUM(Data[Value]),FILTER(Data,Data[Income Statement]="Sales"))
RETURN "Sales "&Sales_Value
```

```
COGS label =
VAR Sales_Value = CALCULATE(SUM(Data[Value]),FILTER(Data,Data[Income Statement]="Sales"))
VAR COGS_Value = CALCULATE(SUM(Data[Value]),FILTER(Data,Data[Income Statement]="COGS"))
RETURN "COGS "&COGS_Value&" ("&FORMAT(DIVIDE(COGS_Value,Sales_Value),"#,0.00")*100&"%)"
```

```
Gross Profit label =
VAR Sales_Value = CALCULATE(SUM(Data[Value]),FILTER(Data,Data[Income Statement]="Sales"))
VAR Gross_Profit_Value = CALCULATE(SUM(Data[Value]),FILTER(Data,Data[Income Statement]="Gross Profit"))
RETURN "Gross Profit "&Gross_Profit_Value&" ("&FORMAT(DIVIDE(Gross_Profit_Value,Sales_Value),"#,0.00")*100&"%)"
```

Don't forget!
This isn't the truth, it's just my truth!

Patou Tips

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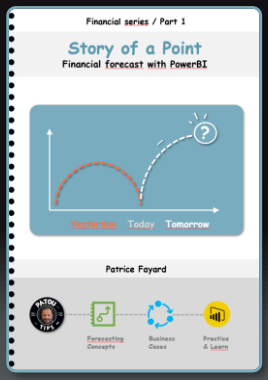

From the book
"Story of a Point"
Financial forecast with PowerBi

Available in book and e-book
English : ***December 2025***
French : *January 2026*
German : *March 2026*