

FINANCIAL PERFORMANCE DASHBOARD

Business Analyst
Internship Project



Objective

- To analyze the company's financial performance using key metrics.
- To visualize trends in Sales, Profit, COGS, and Discounts.
- To provide actionable insights to improve business decisions.



Dataset Description

- **Source:** Company-provided financial data
- **Dataset Contains:**
- Fields like Segment, Country, Product, Discount Band, Date
- Gross Sales, Discounts, Sales, COGS, Profit, Units Sold
- **Time Frame:** 2013–2014
- **Total Records:** 700 rows



Approach

✓ Data Preparation:

- Cleaned currency formats (removed \$) and corrected data types.

✓ Created Calculated Fields:

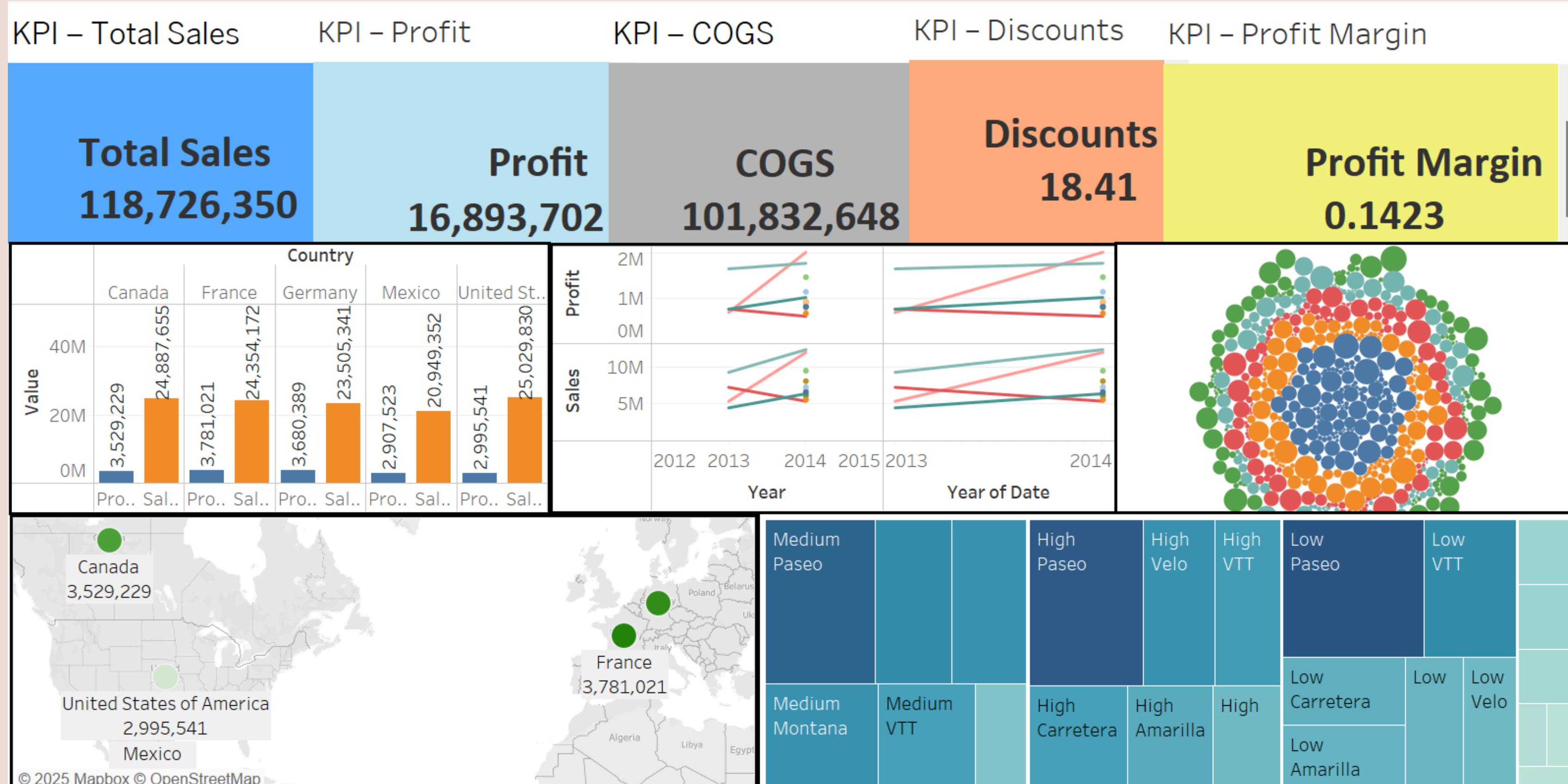
- Profit Margin
- Cost-to-Sales Ratio
- Net Sales
- Discount Impact %
- Total Revenue

✓ Visualizations Built:

- **Bar Chart** → Sales & Profit by Country
- **Line Chart** → Sales & Profit Over Time
- **Bubble Chart** → Gross Sales vs Discounts
- **Heatmap** → Sales by Product & Discount Band
- **Map** → Profit by Country

✓ Created KPI Cards for → Sales, Profit, COGS, Discounts, Profit Margin

“Financial Performance Dashboard – Business Analyst Project”



Key Insights (Based on Dashboard)

- **Top Countries by Sales:**

- United States: ₹25,029,830
- Canada: ₹24,887,655
- France: ₹24,354,172

- **Top Countries by Profit:**

- France: ₹3,781,021
- Germany: ₹3,680,389
- Canada: ₹3,529,229

- **Top-Selling Products:**

- Paseo (especially Medium and Low Discount Band)
- Montana and Velo (strong performance in Medium Band)

- **Discount Impact:**

- Discounts are significant in driving sales for some products but impact profit margins.

- **Profit Trend:**

- Profit grows steadily in some months, but there is volatility in months like November and December.

- **Cost-to-Sales Ratio:**

- Indicates the need to control COGS to boost profitability.



Conclusion

- The dashboard offers a clear view of sales, profit, and discount impact across countries and products.

Recommendations

- Focus on products like Paseo, Montana, and Velo with higher returns.
- Optimize discount strategies to avoid margin loss.
- Increase focus on top-performing regions (USA, Canada, France).
- Monitor months like November–December where performance fluctuates.



THANK YOU

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