Excel VBA Dashboard Project – Stock P&L Performance (Jan–Jun 2024)

This dashboard tracks the profit and loss (P&L) of selected stocks (HDFC, INFY, ITC, RELIANCE, TCS) over a 6-month period.

Built using:

- Excel Pivot Tables

- Slicers for filtering (Month, Stock)

- Dynamic Charts (Line, Column, Bar)

- Clean layout with theme-based design

🔹 Interactive Slicers:

- Allows user to filter by Month or Stock

- Automatically updates all visuals

🔹 Total P&L, Best Month, Worst Month Cards:

- Uses formulas + conditional formatting to summarize top performance indicators

🔹 Visual Charts:

- Monthly Trend: Line chart shows movement across months

- P&L Comparison: 100% stacked columns for comparison

- Profit/Loss by Stock: Horizontal bar chart for value comparison

- Top 3 Stocks: Ranking based on total P&L

🔹 Clean Navigation:

- Dashboard and Raw Data are organized in separate sheets

✅ Automations:

- Slicers refresh charts instantly

- Formulas auto-detect best/worst month

- Can be expanded for more months/stocks

✅ Ideal For:

- Business owners tracking financial KPIs

- Investors monitoring portfolio returns

- Analysts presenting stock or sales performance

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Excel Automation | VBA | Dashboards

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