

JPMORGAN
CHASE & CO.

Account Sales Data Analysis Interpreted Performance

JPMorgan Chase & Co. is one of the largest and most prominent financial services firms in the world, with a history dating back over 200 years.

KEY HIGHLIGHTS

- **Founded:** 1799
- **Headquarters:** New York City, USA
- **CEO:** Jamie Dimon
- **Global Presence:** Operates in more than 100 countries
- **Employees:** Over 250,000
- **Market Cap:** Over \$400 billion (as of 2023)

**Investment
Banking**

**Corporate &
Investment
Bank**

**Commercial
Banking**

**Consumer &
Community
Banking**

**Asset &
Wealth
Management**

Problem Statement

The company aims to analyze account performance metrics for over 5 year's (2017 to 2021), focusing on the factors driving compound annual growth rate (CAGR) in unit sales and identifying opportunities for improvement.

- Total Sales per Year
- Sales analysis with respect to the different Account types in the sales market.
- Total sales foregiving the different Product status analysing the high demand , average demand and low demand of products with respect to the different types of Account Type.
- Top 10 sales according to the 5 Year Compound Annual Growth Rate i.e., CAGR with respect to the different Account Names associated.
- The Average of 5 Year CAGR representig the Account Types,
- Total Sales percent based on the Account Types.
- The Year-over-Year breakdown representing Sales market by Year.

Excel Analysis

Extract,
Transform,
Load data's
with
the help of
Power
Query,
also made
few
calculations
as required.

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Account Name	Account Type	Product 1	Product 2	Product 3	2017	2018	2019	2020	2021	\$ YR CAGR	Total Unit Sales	Product Status
SB 1	Small Business	Yes	Yes	Yes	\$ 1,882.00	\$ 5,388.00	\$ 7,063.00	\$ 7,208.00	\$ 9,093.00	46%	\$ 30,734.00	In Demand
SB 2	Small Business	Yes	Yes	Yes	\$ 2,786.00	\$ 3,804.00	\$ 4,321.00	\$ 6,210.00	\$ 6,505.00	25%	\$ 23,830.00	In Demand
SB 3	Small Business	Yes	Yes	Yes	\$ 1,209.00	\$ 1,534.00	\$ 1,634.00	\$ 4,302.00	\$ 9,768.00	69%	\$ 18,447.00	In Demand
SB 4	Small Business	Yes	Yes	Yes	\$ 956.00	\$ 1,251.00	\$ 2,897.00	\$ 4,459.00	\$ 9,438.00	80%	\$ 18,981.00	In Demand
SB 5	Small Business	Yes	Yes	No	\$ 1,423.00	\$ 1,893.00	\$ 2,722.00	\$ 4,410.00	\$ 5,873.00	43%	\$ 16,319.00	Low Demand
SB 6	Small Business	Yes	Yes	Yes	\$ 2,343.00	\$ 6,305.00	\$ 7,777.00	\$ 7,891.00	\$ 8,758.00	39%	\$ 32,872.00	In Demand
SB 7	Small Business	Yes	No	No	\$ 9,252.00	\$ 8,499.00	\$ 993.00	\$ 448.00	\$ 211.00	-61%	\$ 19,401.00	No Demand
SB 8	Small Business	Yes	No	Yes	\$ 1,581.00	\$ 4,799.00	\$ 6,582.00	\$ 9,024.00	\$ 9,759.00	58%	\$ 31,745.00	Low Demand
SB 9	Small Business	Yes	No	No	\$ 9,766.00	\$ 8,049.00	\$ 5,556.00	\$ 5,202.00	\$ 2,373.00	-30%	\$ 30,946.00	No Demand
SB 10	Small Business	Yes	Yes	No	\$ 1,530.00	\$ 1,620.00	\$ 2,027.00	\$ 4,881.00	\$ 6,002.00	41%	\$ 16,060.00	Low Demand
SB 11	Small Business	Yes	No	No	\$ 7,555.00	\$ 6,551.00	\$ 5,388.00	\$ 3,436.00	\$ 2,359.00	-25%	\$ 25,089.00	No Demand
SB 12	Small Business	Yes	No	No	\$ 1,532.00	\$ 2,678.00	\$ 4,068.00	\$ 4,276.00	\$ 5,382.00	37%	\$ 17,918.00	No Demand
SB 13	Small Business	Yes	No	Yes	\$ 24.00	\$ 1,797.00	\$ 3,548.00	\$ 3,668.00	\$ 8,502.00	135%	\$ 17,629.00	Low Demand
SB 14	Small Business	Yes	Yes	Yes	\$ 881.00	\$ 1,314.00	\$ 1,810.00	\$ 6,510.00	\$ 9,271.00	81%	\$ 19,766.00	In Demand
SB 15	Small Business	Yes	Yes	No	\$ 9,058.00	\$ 4,839.00	\$ 4,776.00	\$ 4,024.00	\$ 369.00	-55%	\$ 23,066.00	Low Demand
MB 1	Medium Business	Yes	Yes	No	\$ 3,503.00	\$ 7,079.00	\$ 7,438.00	\$ 7,443.00	\$ 9,225.00	27%	\$ 34,686.00	Low Demand
MB 2	Medium Business	Yes	Yes	No	\$ 3,956.00	\$ 4,218.00	\$ 5,073.00	\$ 5,201.00	\$ 7,588.00	18%	\$ 25,995.00	Low Demand
MB 3	Medium Business	Yes	Yes	No	\$ 700.00	\$ 5,721.00	\$ 6,247.00	\$ 8,495.00	\$ 9,236.00	91%	\$ 30,199.00	Low Demand
MB 4	Medium Business	Yes	Yes	No	\$ 9,773.00	\$ 9,179.00	\$ 8,390.00	\$ 8,256.00	\$ 3,815.00	-21%	\$ 39,413.00	Low Demand
MB 5	Medium Business	Yes	Yes	No	\$ 73.00	\$ 3,485.00	\$ 4,592.00	\$ 5,143.00	\$ 8,100.00	225%	\$ 21,393.00	Low Demand
MB 6	Medium Business	Yes	Yes	No	\$ 238.00	\$ 1,235.00	\$ 1,822.00	\$ 7,074.00	\$ 8,207.00	142%	\$ 18,576.00	Low Demand
MB 7	Medium Business	Yes	Yes	No	\$ 1,368.00	\$ 3,447.00	\$ 4,535.00	\$ 5,476.00	\$ 9,983.00	64%	\$ 24,809.00	Low Demand
MB 8	Medium Business	Yes	No	No	\$ 8,331.00	\$ 7,667.00	\$ 5,952.00	\$ 1,998.00	\$ 375.00	-54%	\$ 24,323.00	No Demand
MB 9	Medium Business	Yes	Yes	No	\$ 1,779.00	\$ 2,124.00	\$ 2,844.00	\$ 6,877.00	\$ 9,570.00	52%	\$ 23,194.00	Low Demand
MB 10	Medium Business	Yes	Yes	No	\$ 570.00	\$ 1,322.00	\$ 7,279.00	\$ 8,443.00	\$ 9,571.00	102%	\$ 27,185.00	Low Demand
MB 11	Medium Business	Yes	No	No	\$ 6,156.00	\$ 6,110.00	\$ 5,793.00	\$ 1,759.00	\$ 969.00	-37%	\$ 20,785.00	No Demand
MB 12	Medium Business	Yes	Yes	No	\$ 209.00	\$ 621.00	\$ 3,098.00	\$ 7,118.00	\$ 8,433.00	152%	\$ 19,479.00	Low Demand
MB 13	Medium Business	Yes	Yes	No	\$ 6,309.00	\$ 6,227.00	\$ 5,123.00	\$ 4,968.00	\$ 3,857.00	-12%	\$ 26,484.00	Low Demand
MB 14	Medium Business	Yes	Yes	No	\$ 712.00	\$ 4,182.00	\$ 6,087.00	\$ 7,494.00	\$ 8,599.00	86%	\$ 27,074.00	Low Demand
MB 15	Medium Business	Yes	Yes	No	\$ 2,390.00	\$ 2,415.00	\$ 3,461.00	\$ 3,850.00	\$ 4,657.00	18%	\$ 16,773.00	Low Demand
OR 1	Online Retailer	Yes	Yes	Yes	\$ 2,518.00	\$ 3,938.00	\$ 5,390.00	\$ 8,203.00	\$ 8,780.00	37%	\$ 28,630.00	In Demand
OR 2	Online Retailer	Yes	Yes	Yes	\$ 138.00	\$ 286.00	\$ 6,750.00	\$ 8,254.00	\$ 8,656.00	181%	\$ 24,084.00	In Demand
OR 3	Online Retailer	Yes	Yes	Yes	\$ 8,873.00	\$ 8,484.00	\$ 7,883.00	\$ 7,499.00	\$ 6,502.00	-7%	\$ 39,331.00	In Demand
OR 4	Online Retailer	Yes	Yes	Yes	\$ 3,297.00	\$ 4,866.00	\$ 4,928.00	\$ 8,451.00	\$ 9,585.00	31%	\$ 31,127.00	In Demand
OR 5	Online Retailer	Yes	Yes	Yes	\$ 1,092.00	\$ 3,140.00	\$ 4,323.00	\$ 8,366.00	\$ 9,482.00	72%	\$ 22,203.00	In Demand
OR 6	Online Retailer	Yes	Yes	Yes	\$ 2,541.00	\$ 3,794.00	\$ 3,984.00	\$ 8,803.00	\$ 9,338.00	38%	\$ 28,460.00	In Demand
OR 7	Online Retailer	Yes	Yes	Yes	\$ 742.00	\$ 3,751.00	\$ 4,423.00	\$ 8,733.00	\$ 9,909.00	91%	\$ 27,558.00	In Demand
OR 8	Online Retailer	Yes	No	No	\$ 7,703.00	\$ 6,957.00	\$ 3,898.00	\$ 1,857.00	\$ 1,512.00	-33%	\$ 21,927.00	No Demand
OR 9	Online Retailer	Yes	Yes	Yes	\$ 488.00	\$ 5,325.00	\$ 5,775.00	\$ 7,661.00	\$ 9,206.00	108%	\$ 28,665.00	In Demand
OR 10	Online Retailer	Yes	Yes	Yes	\$ 376.00	\$ 889.00	\$ 4,173.00	\$ 6,803.00	\$ 7,578.00	112%	\$ 20,019.00	In Demand
OR 11	Online Retailer	Yes	No	No	\$ 7,840.00	\$ 5,804.00	\$ 4,259.00	\$ 4,243.00	\$ 907.00	-42%	\$ 23,053.00	No Demand
OR 12	Online Retailer	Yes	Yes	Yes	\$ 1,038.00	\$ 3,615.00	\$ 3,712.00	\$ 5,819.00	\$ 9,589.00	74%	\$ 23,773.00	In Demand
OR 13	Online Retailer	Yes	Yes	No	\$ 8,892.00	\$ 5,952.00	\$ 5,934.00	\$ 5,405.00	\$ 4,031.00	-18%	\$ 30,193.00	Low Demand
OR 14	Online Retailer	Yes	Yes	Yes	\$ 1,290.00	\$ 4,031.00	\$ 6,956.00	\$ 7,029.00	\$ 8,834.00	62%	\$ 29,042.00	In Demand
OR 15	Online Retailer	Yes	Yes	Yes	\$ 431.00	\$ 6,231.00	\$ 7,478.00	\$ 8,039.00	\$ 8,271.00	109%	\$ 30,450.00	In Demand
WD 1	Wholesale Distributor	Yes	No	No	\$ 8,156.00	\$ 1,245.00	\$ 791.00	\$ 338.00	\$ 44.00	-73%	\$ 10,574.00	No Demand
WD 2	Wholesale Distributor	Yes	Yes	Yes	\$ 299.00	\$ 657.00	\$ 6,238.00	\$ 8,922.00	\$ 9,081.00	135%	\$ 25,197.00	In Demand
WD 3	Wholesale Distributor	Yes	Yes	Yes	\$ 1,123.00	\$ 4,963.00	\$ 6,292.00	\$ 6,728.00	\$ 8,202.00	58%	\$ 27,508.00	In Demand
WD 4	Wholesale Distributor	Yes	No	No	\$ 8,466.00	\$ 4,079.00	\$ 2,797.00	\$ 2,245.00	\$ 1,696.00	-33%	\$ 19,283.00	No Demand
WD 5	Wholesale Distributor	Yes	Yes	Yes	\$ 870.00	\$ 2,428.00	\$ 7,386.00	\$ 8,835.00	\$ 9,766.00	83%	\$ 29,285.00	In Demand
WD 6	Wholesale Distributor	Yes	Yes	Yes	\$ 1,497.00	\$ 1,768.00	\$ 2,804.00	\$ 5,718.00	\$ 8,822.00	60%	\$ 21,609.00	In Demand
WD 7	Wholesale Distributor	Yes	Yes	Yes	\$ 1,082.00	\$ 3,353.00	\$ 6,351.00	\$ 8,550.00	\$ 9,272.00	71%	\$ 28,608.00	In Demand
WD 8	Wholesale Distributor	Yes	Yes	No	\$ 9,792.00	\$ 9,610.00	\$ 7,534.00	\$ 5,080.00	\$ 4,936.00	-16%	\$ 36,951.00	Low Demand
WD 9	Wholesale Distributor	Yes	Yes	Yes	\$ 1,357.00	\$ 4,189.00	\$ 5,407.00	\$ 6,233.00	\$ 9,681.00	63%	\$ 26,867.00	In Demand
WD 10	Wholesale Distributor	Yes	No	No	\$ 576.00	\$ 2,628.00	\$ 3,632.00	\$ 5,066.00	\$ 5,156.00	73%	\$ 17,038.00	No Demand
WD 11	Wholesale Distributor	Yes	Yes	Yes	\$ 128.00	\$ 416.00	\$ 747.00	\$ 1,028.00	\$ 6,357.00	165%	\$ 8,676.00	In Demand
WD 12	Wholesale Distributor	Yes	No	No	\$ 8,034.00	\$ 6,541.00	\$ 3,333.00	\$ 3,254.00	\$ 2,687.00	-24%	\$ 23,827.00	No Demand
WD 13	Wholesale Distributor	Yes	Yes	Yes	\$ 1,263.00	\$ 2,517.00	\$ 8,042.00	\$ 8,222.00	\$ 9,686.00	66%	\$ 29,730.00	In Demand
WD 14	Wholesale Distributor	Yes	Yes	Yes	\$ 1,032.00	\$ 3,929.00	\$ 4,466.00	\$ 5,566.00	\$ 6,476.00	58%	\$ 21,461.00	In Demand
WD 15	Wholesale Distributor	Yes	Yes	Yes	\$ 1,034.00	\$ 2,254.00	\$ 4,534.00	\$ 6,796.00	\$ 7,730.00	66%	\$ 22,328.00	In Demand

Detailed Dashboard Presentation



Total Sales
1.48 M



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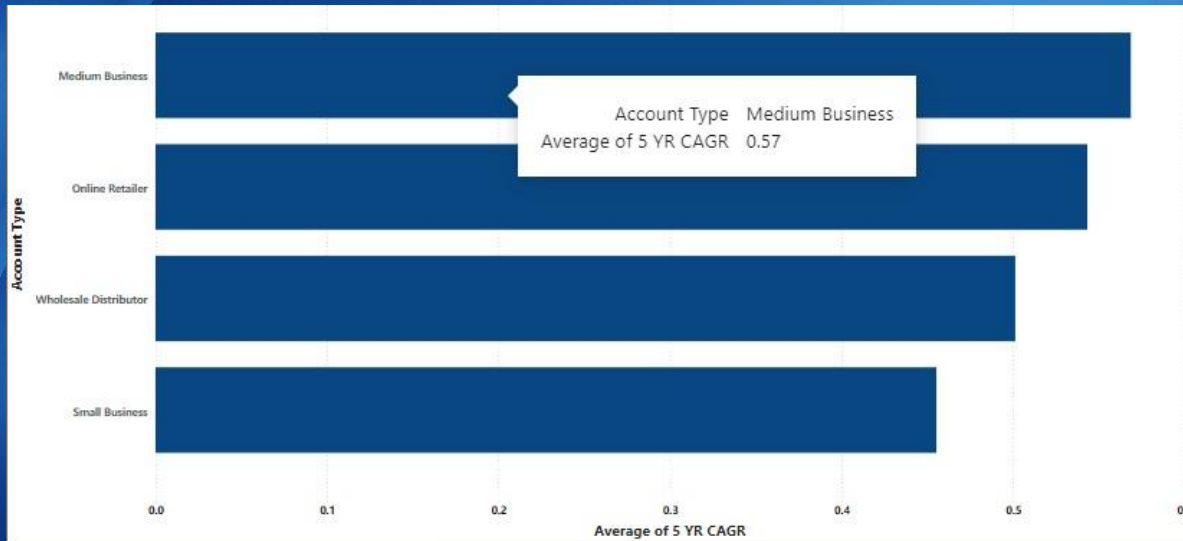


Descriptive Analysis

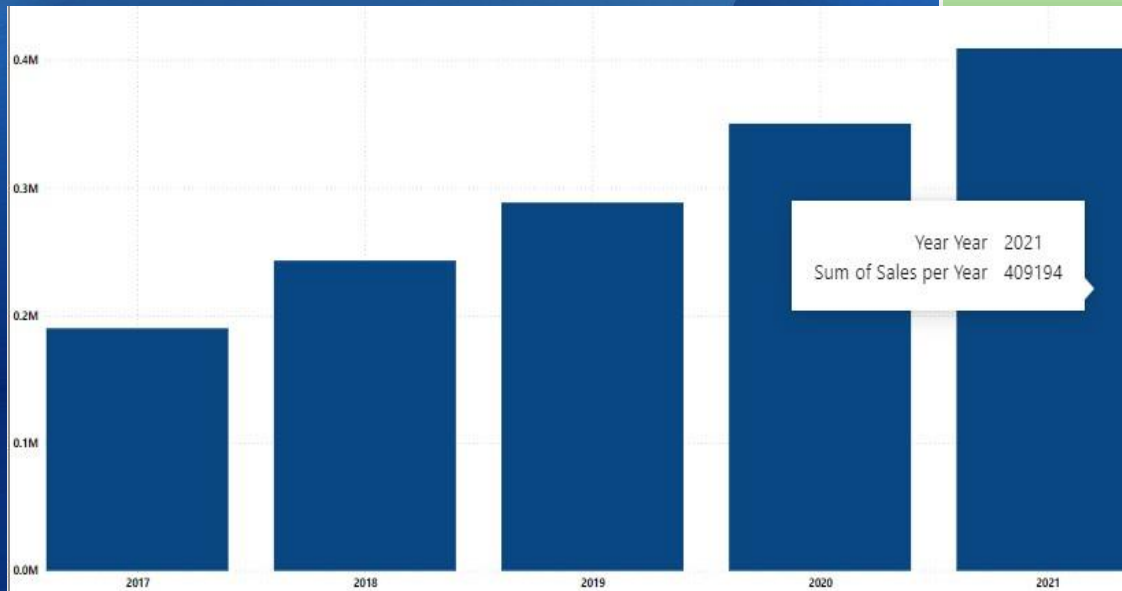
5 YR CAGR		Total Unit Sales	
Descriptive Analysis	Values	Descriptive Analysis	Values
Mean	0.52	Mean	24680.80
Standard Error	0.09	Standard Error	807.43
Median	0.58	Median	24203.50
Mode	0.58	Mode	39413
Standard Deviation	0.73	Standard Deviation	6254.34
Sample Variance	0.53	Sample Variance	39116795.99
Kurtosis	2.88	Kurtosis	0.26
Skewness	1.05	Skewness	0.05
Range	4.08	Range	30737
Minimum	-0.73	Minimum	8676
Maximum	3.35	Maximum	39413
Sum	31.03	Sum	1480848
Count	60	Count	60

- The average target raised for the 5-year CAGR is approximately 52%, and total unit sales are acquired at an average of 24681.
- The maximum of 5-year CAGR is 3.35 crediting the SB 13 account, and total unit sales max is 39413 respectively.
- Following the minimum 5-year CAGR with a negative value of -0.73 and total unit sales of 8676.

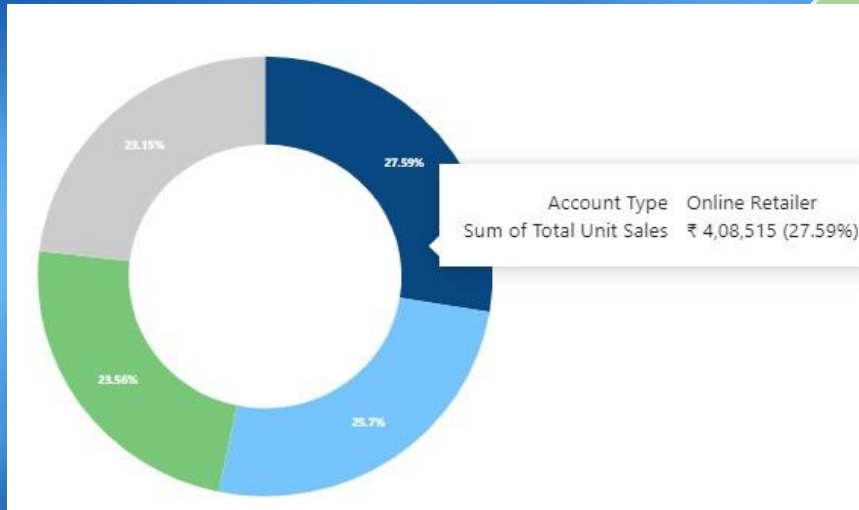
Breakdown of the Data



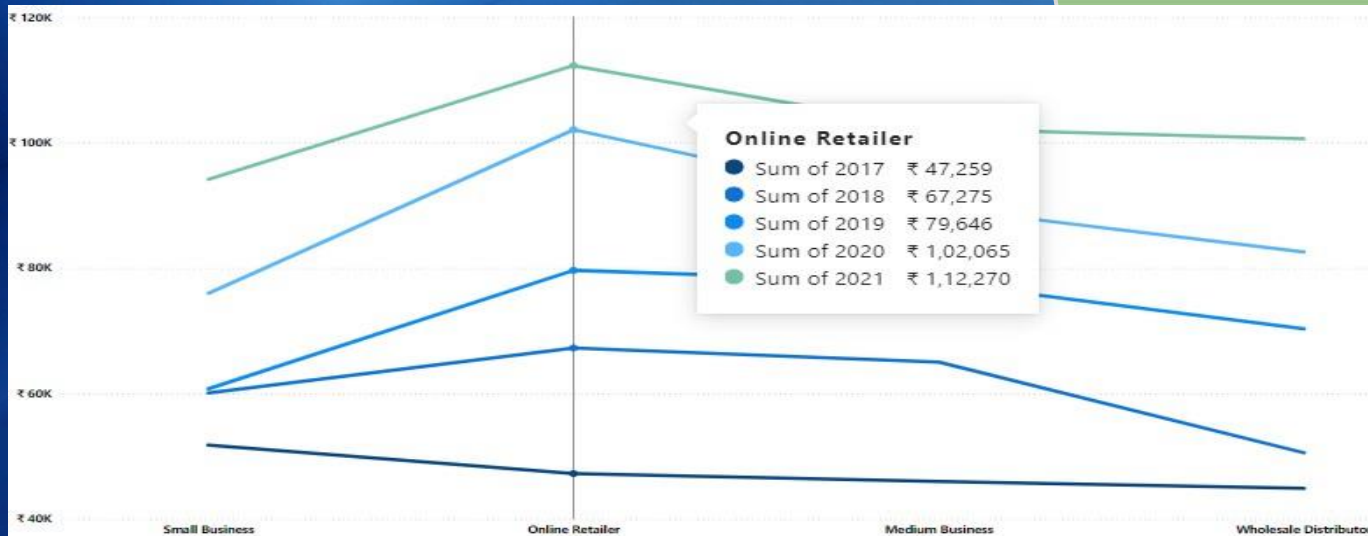
According to the forgiven data, we may interpret here that there has been continuous growth witnessed every year, with an immense rise in sales by the year 2021. We may also notice that the Medium Business is doing well overall in terms of the 5-year CAGR which is accounting towards approximately 57%.



Conclusion Analysis



Acknowledging the sales growth in the future aspect, we can clearly see there is a potential profit is visualised in the account type of "Online Retailer". The Sum Total of Sales with a good margin of Rs. 4,08,512, i.e., 27.59%. Every year, there has been a continuous rise in the range of "online retailer" accounts, which leads to the tailoring of sales strategies associated with better decision-making.



THANK YOU

JPMORGAN CHASE & CO.



Forage

Inspiring and empowering
future professionals

Shreya Sonal

Excel Skills Job Simulation

Certificate of Completion
July 11th, 2024

Over the period of June 2024 to July 2024, Shreya Sonal has completed practical tasks in:

Excel Keyboard Shortcuts
Conditional Formatting
Visual Basic for Applications (VBA) Macros
Data Visualization in Excel
Data-Driven Storytelling



Tom Brunskill
CEO, Co-Founder of
Forage