

XYZ Store – Financial Report Analysis (Power BI)

Dashboard Overview

This Power BI dashboard provides a comprehensive financial performance analysis for XYZ Store. It compares current year (CY) performance against previous year (PY) and highlights sales growth, profitability, margins, and discount behavior across countries, segments, and products.

Key Performance Highlights (CY vs PY)

- 1 Sales: 9.23M (+249.46%) – Significant year-over-year revenue growth.
- 2 Orders: 8.61K (+225.36%) – Strong increase in order volume.
- 3 Profit: 1.30M (+235.58%) – Profit growth aligned with sales increase.
- 4 Margin: 14.1% (–3.97%) – Slight margin decline indicates cost or discount pressure.
- 5 Discount Offered: 70.59K (+229.04%) – Higher discounts used to drive sales growth.

Geographical Performance

Canada and France lead in order volume, followed closely by the United States and Mexico. Profit margin by country shows Germany and France performing better, while margins in some regions are slightly lower, indicating regional pricing or cost differences.

Discount Analysis

High discount band accounts for nearly 58% of total discounts, indicating aggressive promotional strategies. Medium and low discount bands contribute the remaining share. This explains strong sales growth but also the slight decline in overall margin.

Segment-wise Profit Margin

- 1 Channel Partners: ~73% margin – highest performing segment.
- 2 Midmarket: ~27% margin – stable profitability.
- 3 Government & Enterprise: Lower or negative margins due to heavy discounting or pricing pressure.

Product Performance

Paseo is the top-selling product, followed by VTT and Velo. These products contribute the majority of total revenue. However, some products show lower or negative margins in specific segments, indicating a need for product-level pricing optimization.

Sales Trend Over Time

Monthly sales trend shows fluctuations with strong peaks towards later months, suggesting seasonality or successful campaigns during that period.

Business Insights & Recommendations

- 1 Sales growth is driven by higher order volume and aggressive discounting.
- 2 Margin decline needs monitoring to ensure long-term profitability.
- 3 Focus on high-margin segments like Channel Partners.
- 4 Optimize discount strategies in low-margin segments.
- 5 Strengthen presence in top-performing countries while improving weaker regions.

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