

# Power BI DAX Calculations

## Fiscal Calculations

### Fiscal Year

```
FiscalYr =  
IF(MONTH('DateTable'[Date]) >= 4, YEAR('DateTable'[Date]),  
YEAR('DateTable'[Date]) - 1)
```

### Fiscal Quarter

```
FiscalQtr =  
IF(QUARTER('DateTable'[Date]) >= 2, QUARTER('DateTable'[Date]) - 1,  
QUARTER('DateTable'[Date]) + 3)
```

### Fiscal Month Number

```
FiscalMonthno =  
IF(MONTH('DateTable'[Date]) >= 4, MONTH('DateTable'[Date]) - 3,  
MONTH('DateTable'[Date]) + 9)
```

### Fiscal Year Format (e.g., 04-05)

```
FY(04-05) =  
VAR cy = RIGHT(YEAR(DateTable[Date]),2)  
VAR ly = RIGHT(YEAR(DateTable[Date])-1,2)  
VAR ny = RIGHT(YEAR(DateTable[Date])+1,2)  
VAR fiscyear =  
    IF(MONTH(DateTable[Date]) >= 4, cy & "-" & ny, ly & "-" & cy)  
RETURN fiscyear
```

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## Time Intelligence DAX Calculations

### Month-To-Date (MTD) Calculations

#### Based on Date Column

```
MTD = TOTALMTD([Total Sale], DATESMTD(DimDate[Date]))
```

#### Based on Year and Month Column

```
CM_MTD =  
VAR a = MAX(Datetable[year])  
VAR b = MAX(Datetable[monthno])  
RETURN  
    CALCULATE(  
        [Total Sales],  
        FILTER(  
            ALL(Datetable), Datetable[year] = a && Datetable[monthno] = b  
        )  
    )
```

)

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## Previous Month-To-Date (PM MTD) Calculations

### Based on Date Column

```
Sales MTD Previous = CALCULATE(  
    [Sales MTD],  
    DATEADD(DimDate[FullDateAlternateKey], -1, MONTH)  
)
```

### Based on Year and Month Column

```
PM_MTD_2 =  
VAR d = MAX(Datetable[year])  
VAR m = MAX(Datetable[monthno])  
VAR prevMonth = m - 1  
VAR LatestDateInCurrentMonth = MAX(Datetable[Date])  
VAR TotalDaysInCurrentMonth = DAY(EOMONTH(LatestDateInCurrentMonth, 0))  
VAR LatestDay = DAY(LatestDateInCurrentMonth)  
VAR UseFullPreviousMonth = LatestDay = TotalDaysInCurrentMonth  
RETURN  
    CALCULATE(  
        [Total Sales],  
        FILTER(  
            ALL(Datetable),  
            Datetable[year] = d &&  
            Datetable[monthno] = prevMonth &&  
            (UseFullPreviousMonth || Datetable[dayno] <= LatestDay)  
        )  
    )
```

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## Quarter-To-Date (QTD) Calculations

### Based on Date Column

```
Sales QTD = CALCULATE(  
    [Sales],  
    DATESQTD(DimDate[Date])  
)
```

### Based on Year and Month Column

```
QTD Sales =  
VAR CurrentYear = MAX(Datetable[Year])  
VAR CurrentQuarter = MAX(Datetable[Quarter])  
VAR LatestDate = MAX(Datetable[Date])  
RETURN  
    CALCULATE(  
        [Total Sales],  
        FILTER(  
            ALL(Datetable),  
            Datetable[Year] = CurrentYear &&  
            Datetable[Quarter] = CurrentQuarter &&  
            Datetable[Date] <= LatestDate  
        )  
    )
```

```
)  
)
```

---

## Previous Quarter-To-Date (QTD) Calculations

### Based on Date Column

```
Sales QTD Previous = CALCULATE(  
    [Sales QTD],  
    DATEADD(DimDate[FullDateAlternateKey], -1, QUARTER)  
)
```

### Based on Year and Month Column

```
QTD Sales Previous =  
VAR CurrentYear = MAX(Datetable[Year])  
VAR CurrentQuarter = MAX(Datetable[Quarter]) - 1  
VAR LatestDate = MAX(Datetable[Date])  
RETURN  
    CALCULATE(  
        [Total Sales],  
        FILTER(  
            ALL(Datetable),  
            Datetable[Year] = CurrentYear &&  
            Datetable[Quarter] = CurrentQuarter &&  
            Datetable[Date] <= LatestDate  
        )  
    )
```

---

## Year-To-Date (YTD) Calculations

### Based on Date Column

```
Sales YTD =  
CALCULATE(  
    [Sales],  
    DATESYTD(DimDate[FullDateAlternateKey])  
)
```

### Based on Year and Month Column

```
sales YTD 2 =  
VAR CurrentYear = MAX('Datetable'[year])  
RETURN  
    CALCULATE(  
        [Total Sales],  
        FILTER(  
            'Datetable',  
            'Datetable'[Year] = CurrentYear  
        )  
    )
```

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## Previous Year-To-Date (YTD) Calculations

### **Based on Date Column**

```
Sales YTD Previous =  
CALCULATE(  
    [Sales YTD],  
    DATEADD(DimDate[FullDateAlternateKey], -1, YEAR)  
)
```

### **Based on Year and Month Column**

```
sales YTD Previous =  
VAR CurrentYear = MAX('Datetable'[year]) - 1  
RETURN  
    CALCULATE(  
        [Total Sales],  
        FILTER(  
            'Datetable',  
            'Datetable'[Year] = CurrentYear  
        )  
    )
```