

Internship Report on
POWER BI

*is submitted in partial fulfillment of the requirement for the award of the Degree of
Bachelor of Technology*

to



Department of Computer Science & Engineering,

Narayana Engineering College, Nellore

by

SHAIK TAZEEM ALI SHAH

(21715A0512)

Internship carried out at

Octobuz Academy,

Nellore.

(Duration: 08th May, 2023 to 04th June, 2023)



Department of Computer Science and Engineering

NARAYANA ENGINEERING COLLEGE::NELLORE

AUTONOMOUS



2023-2024



DEPARTMENT OF COMPUTER SCIENCE & ENGINEERING



CERTIFICATE

This is to certify that the "**Internship Report**" is submitted by **SHAIK TAZEEM ALI SHAH (21715A0512)** during academic year 2023-2024, in partial fulfillment of the requirements for the award of degree of **Bachelor of Technology in Computer Science & Engineering**, at Octobuz Academy, Nellore.

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Signature of the Examiner(s)

DECLARATION

I hereby declare that the internship entitled **Financial Analysis Report** has been done at **Octobuz Academy, Nellore**. This internship work has been submitted to **Narayana Engineering College (Autonomous), Nellore** as a part of partial fulfillment of the requirements for the award of degree of **Bachelor of Technology in Computer Science & Engineering**.

I also declare that this internship report has not submitted to any other institute or university and not copied from any other sources.

**SHAIK TAZEEM ALI SHAH
(21715A0512)**

Place: NELLORE

Date:

ACKNOWLEDGEMENT

I am extremely thankful to **Narayana Engineering College, Nellore**, for providing basic needs and support to accomplish this internship.

I am highly indebted to the **Management, Principal** of Narayana Engineering College Nellore and thanks to **Head of the Department, Internship Coordinator** and **Mentor** of Computer Science and Engineering for constant support and encouragement for the betterment of the internship.

I would like to thank the **CEO of Octobuz Academy**, Nellore for giving me the opportunity to do an internship. I also would like all the people that worked along with me in Octobuz Academy, Nellore with their patience and openness they created an enjoyable working environment. It is indeed with a great sense of pleasure and immense sense of gratitude that I acknowledge the help of these individuals.

**SHAIK TAZEEM ALI SHAH
(21715A0512)**

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ABSTRACT

Microsoft Power BI is a Business Intelligence (BI) platform that provides nontechnical business users with tools for aggregating, analyzing, visualizing and sharing data. The financial analysis report aims to provide a comprehensive overview of the company's financial performance using Power BI, a powerful business intelligence tool. By leveraging its data visualization capabilities and interactive features, this report enables stakeholders to make informed decisions and gain valuable insights.

The report begins with an executive summary, highlighting the key financial metrics and trends observed during the analysis period. It includes an overview of the company's revenue, profitability, liquidity, and solvency, providing a snapshot of its financial health.

Next, the report delves into the detailed analysis of various financial aspects. It explores revenue streams, analyzing the contribution of different product lines or customer segments to overall sales. The profitability section evaluates key profitability ratios, such as gross profit margin, operating margin, and net profit margin, shedding light on the company's operational efficiency and effectiveness.

Microsoft Power BI is used to find insights within an organization's data. Power BI can help connect disparate data sets, transform and clean the data into a data model and create charts or graphs to provide visuals of the data. All of this can be shared with other Power BI users within the organization.

The data models created from Power BI can be used in several ways for organizations, including the following:

- Telling stories through charts and data visualizations.
- Examining "what if" scenarios within the data.
- Creating reports that can answer questions in real time and help with forecasting to make sure departments meet business metrics.

Additionally, the report evaluates the company's solvency by analyzing its long-term debt, debt-to-equity ratio, and interest coverage ratio. This provides insights into the company's long-term financial stability and ability to service its debt obligations. Moreover, Power BI's interactive dashboards allow users to drill down into specific financial areas, compare historical performance, and benchmark against industry peers.

In conclusion, this financial analysis report demonstrates the power of Power BI in transforming complex financial data into actionable insights. By harnessing its capabilities, stakeholders can make data-driven decisions, optimize financial performance, and drive sustainable growth.

KEYWORDS:

Canvas, Visuals, Filters, Bookmarks, Slicers, Data visualization, Business Intelligence, Dashboards.

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Internship Offer Letter



Dear **SHAIK TAZEEM ALI SHAH**,

Roll Number: **21715A0512**

Name of College: **NECN**

Congratulations! We are pleased to offer you an internship opportunity as a Power BI Intern at Octobuzz Academy. After careful consideration, we believe that your skills and qualifications make you an excellent fit for our internship program.

We are pleased to provide you with the following details of your internship offer:

Internship Dates: May 8, 2023, to June 4, 2023

Internship Position: Power BI Intern

Internship Location: Octobuzz Academy (Remote)

We are confident that this internship will provide you with a valuable learning experience in the field of Power BI. Throughout the internship, you will work closely with our experienced professionals to develop your skills in Power BI, data visualization, and analysis techniques.

Wish you the most enjoyable, learning packed and truly meaningful internship experience with us.

If you have any questions or require further information, please do not hesitate to reach out to us. We would like to remind you that this is an unpaid internship.

Best regards,

Sai Saran Reddy
Co-Founder
Octobuzz Academy.

Octobuzz Academy Private Limited
CIN: U80301AP2022PTC123731

Regd Office: #59, Balaji Smart city layout, Gundlapalem area, opposite Chenna kesava swamy temple, Muthukur road, Dhanalakshmi puram, Nellore, AP - 524002

Internship Certification



Organization Information / Industry Profile

OCTOBUZ ACADEMY PRIVATE LIMITED ANDHRA PRADESH based PRIVATE ltd. Company registered at dated 29-DEC-2022 on Ministry of Corporate Affairs (MCA). The Corporate Identification Number (CIN) of OCTOBUZ ACADEMY PRIVATE LIMITED is U80301AP2022PTC123731.

It has been classified as COMPANY LIMITED BY SHARES and is registered under Registrar of Companies VIJAYAWADA India. Authorized share capital of OCTOBUZ ACADEMY PRIVATE LIMITED is Rs. 1500000 and its paid-up capital is Rs. 10000. It aspires to serve in EDUCATION activities across the India. Its Annual General Meeting (AGM) was lastly conducted on and as per the records of Ministry of Corporate Affairs (MCA), its balance sheet was last filed on.



The registered Email address of OCTOBUZ ACADEMY PRIVATE LIMITED is aishwaryalahoti09@gmail.com and its registered address is #59, BALAJI SMART CITY LAYOUT, DHANAKLAKSHMI PURAM, GUNDLAPALEM AREA, NELLORE, AP, 524002, INDIA. The current status of OCTOBUZ ACADEMY PRIVATE LIMITED shows as an ACTIVE.

Octobuz Academy strives to bridge the gap between workforce and education programs and participants. Access to professional opportunities operates in a biased way. To combat this, Octobuz Academy is working to create more professional Internships, offering programs for areas of focus such as data analytics, digital marketing, and cyber security.

Benefits to the Institute through your report

Implementing Power BI for financial analysis can bring several benefits to an institute. Here are some of the key advantages:

Data Visualization and Analysis:

Power BI allows the institute to transform complex financial data into interactive and visually appealing dashboards. This visualization helps stakeholders to understand financial trends, patterns, and insights easily, leading to better decision-making.

Data Integration:

Power BI can integrate data from multiple sources, such as accounting software, ERP systems, spreadsheets, and databases. By bringing all financial data together in one place, it provides a comprehensive view of the institute's financial health.

Customizable Dashboards:

Power BI allows users to create custom dashboards and reports tailored to their specific needs. Different departments within the institute can have personalized reports, while executives can have a high-level overview of the financial performance.

Forecasting and Budgeting:

Power BI's data modeling capabilities can help in financial forecasting and budgeting. The institute can use historical data and trends to make more accurate predictions about future financial performance.

Data-driven Decision Making:

With access to real-time financial data and insights, decision-makers can make

more informed choices based on data rather than gut feelings or assumptions.

Increased Efficiency and Time Savings:

Automation of financial reporting and analysis processes through Power BI can save time and effort for finance teams, enabling them to focus on more strategic tasks.

Collaboration and Data Sharing:

Power BI enables easy sharing of financial reports and insights with stakeholders across the organization, promoting collaboration and fostering a data-driven culture.

Mobile Access:

Power BI's mobile app allows the key stakeholders to access financial data and reports on - the - go, providing flexibility and quick access to critical information.

Overall, implementing Power BI for financial analysis can lead to better financial transparency, data-driven decision-making, and improved financial performance for the institute.

Learning Objectives / Internship Objectives

When creating a Power BI financial analysis report, it's essential to define clear learning objectives to guide the design and content of the report. Learning objectives help stakeholders understand what they can gain from the report and how it will benefit them. Here are some common learning objectives for a Power BI financial analysis report:

Understanding Financial Performance:

Provide insights into the institute's financial performance, including revenue, expenses, profitability, and key financial ratios.

Identifying Growth Opportunities:

Analyze financial data to identify potential growth opportunities and investment prospects.

Understanding Customer or Product Profitability:

If applicable, analyze customer or product profitability to focus on the most valuable areas of the business.

Risk Assessment and Mitigation:

Identify potential financial risks and explore strategies to mitigate them effectively.

Interactive Data Exploration:

Enable users to interact with the data, allowing them to drill down into specific details and customize their views for deeper insights.

By establishing clear learning objectives, the Power BI financial analysis report can be designed to meet the specific needs of the stakeholders, promoting effective data-driven decision making and facilitating a better understanding of the institute's financial performance.

CHAPTER – 1

INTRODUCTION

In today's fast-paced and data-driven business landscape, making informed decisions is crucial for the success of any organization. As the saying goes, "Numbers don't lie," and this rings especially true in the financial realm.

In the dynamic and ever-evolving business world, traditional spreadsheet-based financial analysis often falls short in providing timely and insightful information. The need for a more efficient, interactive, and visually appealing solution has led us to embrace Power BI as our tool of choice for financial analysis and reporting.

Power BI is a powerful business intelligence platform that allows us to transform raw financial data into meaningful insights, empowering stakeholders to gain a deeper understanding of financial performance, identify trends, and make data-driven decisions.

With its intuitive interface and advanced capabilities, Power BI enables us to present complex financial information in a visually appealing manner, making it easier for users to digest and act upon the findings.

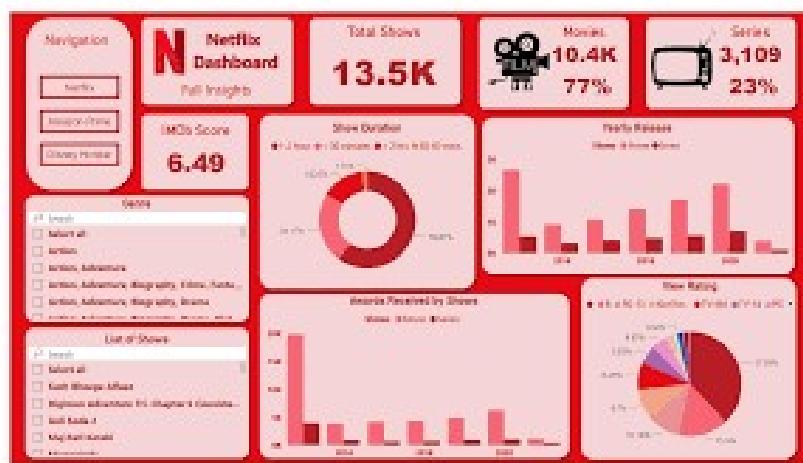


Fig 1.1 Sample Dashboard

The key features are Interactive dashboards, Visual representation, Drill down capabilities, Data consolidation, Collaborative sharing.

Financial analysis uses Microsoft Power BI to bring together financial key performance indicators (KPIs), charts, and financial statements. Power BI is embedded in the application. The focus of financial analysis is analytical reporting.

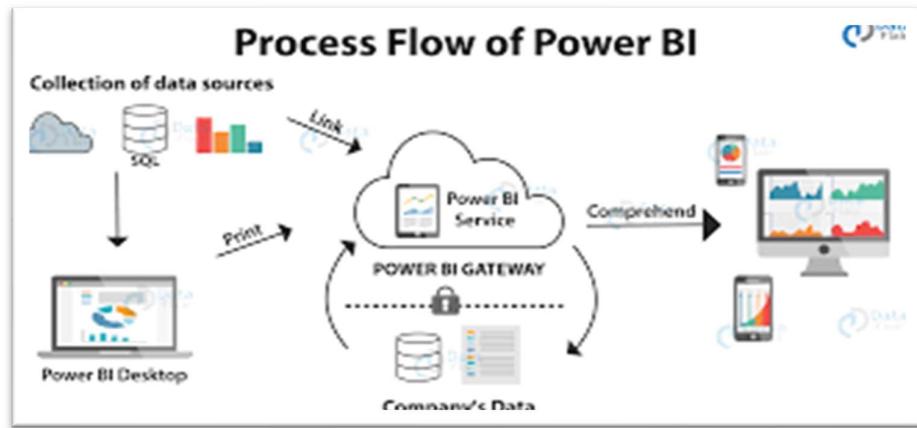


Fig 1.2 – Process Flow of Power BI

Although Financial analysis contains financial statements, it isn't a replacement for financial reporting in the application. The default financial statements in financial analysis are limited in scope and don't include all types of financial statements. Financial reporting is still the primary tool for designing, creating, and generating statutory financial statements.

In this Financial Analysis Report, we aim to provide a data-driven narrative of our organization's financial performance using the powerful capabilities of Power BI. By leveraging interactive dashboards, visual representation, drill-down capabilities, data consolidation, and collaborative sharing, we strive to empower our stakeholders to make well-informed decisions that will steer our company towards sustained growth and success.

CHAPTER - 2

METHODOLOGY

Creating a financial analysis report in Power BI requires careful planning and a structured methodology to ensure accuracy and effectiveness. Below is a step-by-step guide to building a Power BI financial analysis report:

Identify the scope of the report:

Which financial data and metrics will be included, and which will be excluded.

Data Gathering and Preparation:

Collect all relevant financial data from various sources, such as Excel spreadsheets, or cloud services. Clean and preprocess the data to ensure consistency and accuracy. This involves handling missing values, removing duplicates, and standardizing formats.

Data Modeling:

Design a data model that represents your financial data in Power BI. Create relationships between tables, define measures, and calculated columns. Typical tables might include: "Income Statement," "Balance Sheet," "Cash Flow Statement," "Financial Ratios," "Key Performance Indicators (KPIs)," etc.

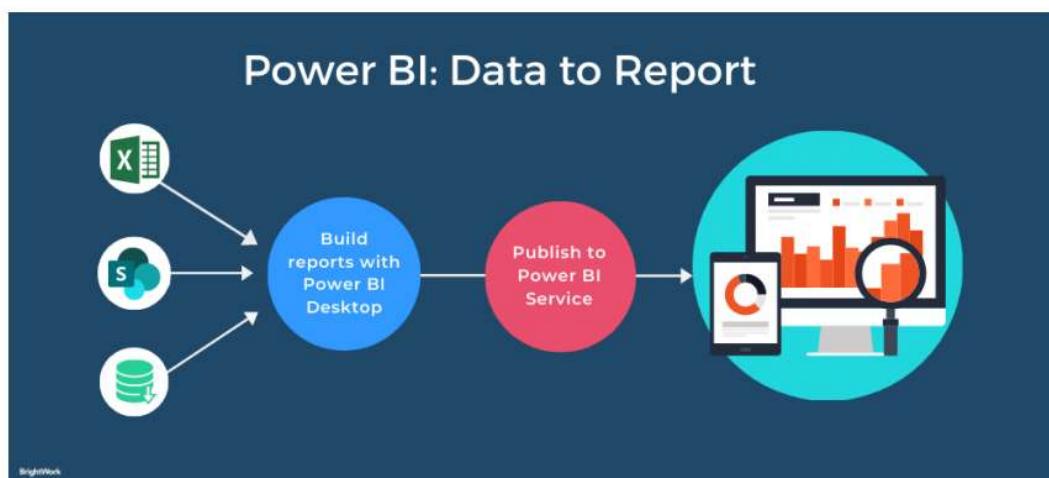


Fig 2.1 Data to Report Presentation

Create Visualizations:

Select appropriate visuals to display different financial metrics effectively. Examples include line charts, bar charts, tables, KPI cards, and scatter plots. Ensure that visualizations are easy to understand and provide valuable insights at-a-glance.

Financial Ratios and Calculations:

Calculate important financial ratios (e.g., Current Ratio, Debt-to-Equity Ratio, Gross Margin) and create visuals to represent them. Use DAX (Data Analysis Expressions) to write formulas for these calculations.

Time Intelligence:

If your data involves time series (e.g., monthly financial data over a year), implement time intelligence functions in DAX to perform calculations across time periods (e.g., month-to-date, year-to-date).

Design and Formatting:

Design the report layout in a user-friendly and visually appealing manner. Ensure consistency in colors, fonts, and branding elements.

Testing and Validation:

Thoroughly test the report to ensure all calculations, visuals, and interactions are working as expected. Validate the accuracy of the report against known financial data.

Publish and Share:

Publish the report to Power BI Service to share it with stakeholders. Ensure proper security and permissions are set for data access.

Continuous Improvement:

Gather feedback from users and stakeholders to make improvements to the report over time. Update the report as new data becomes available or when changes in financial analysis requirements occur.

CHAPTER - 3

STEPS FOR EXECUTING THE PROJECT

To execute a Power BI financial analysis report successfully, follow these steps:

Data Collection and Preparation:

Gather the financial data from the relevant sources, such as Excel files, databases, or cloud services. Ensure the data is clean, accurate, and in a suitable format for Power BI. Perform any necessary data cleaning, transformation, and consolidation.

Install Power BI Desktop:

If you have not already, download and install Power BI Desktop, which is a free application used to create Power BI reports and dashboards.

Import Data into Power BI:

Open Power BI Desktop and import the prepared financial data. Click on "Home" in the top menu, then choose "Get Data" and select the appropriate data source. Follow the prompts to connect to your data and load it into Power BI.

Data Modeling:

Create a data model within Power BI by defining relationships between different tables. Use the "Manage Relationships" option in the "Model" view to set up relationships based on common fields between tables.

Financial Calculations:

Create calculated columns or measures using the DAX (Data Analysis Expressions) language in the "Model" view to calculate the necessary financial metrics and KPIs. For example, you can calculate revenue, expenses, profit margins, growth rates, etc.

Data Visualization:

Navigate to the "Report" view and start creating visualizations for your financial analysis. Drag and drop fields from the "Fields" pane onto the canvas to build charts,

tables, and graphs. Choose the appropriate visualizations to represent your financial data.

Designing the Report:

Organize your visuals on the report canvas in a logical and user-friendly manner. Use formatting options, themes, and colors to create a visually appealing and cohesive report.

Interactive Features:

Add slicers, filters, and other interactive elements to allow users to interact with the data. This enables them to focus on specific aspects of the financial analysis and gain deeper insights.

Time Intelligence:

Utilize Power BI's time intelligence functions to enable time-based comparisons and analysis.

For example, you can calculate year-to-date values, rolling averages, and growth rates over time.

Testing and Review:

Thoroughly test the report to ensure all calculations are accurate, visuals are working correctly, and interactive elements are functioning as expected. Review the report's design and layout for clarity and usability.

Save the Report:

Save the Power BI report (.pbix file) on your local machine.

Publish the Report:

To share the report with others, you need to publish it to the Power BI service. Sign in to your Power BI account, click on "Publish" in Power BI Desktop, and select the workspace where you want to publish the report. The report will be uploaded to the Power BI cloud service.

Share and Collaborate:

Share the published report with relevant stakeholders or colleagues. Set

appropriate permissions to control access to the report and its underlying data.

Data Refresh:

If the financial data is dynamic and regularly updated, schedule automatic data refresh in the Power BI service to keep the report up-to-date.

OrderDate	Region	Rep	Item	Units	Unit Price
04 July 2014	East	Richard	Pen Set	62	4.99
12 July 2014	East	Nick	Binder	29	1.99
21 July 2014	Central	Morgan	Pen Set	55	12.49
29 July 2014	East	Susan	Binder	81	19.99
07 August 2014	Central	Matthew	Pen Set	42	23.95
15 August 2014	East	Richard	Pencil	35	4.99
24 August 2014	West	James	Desk	3	275
01 September 2014	Central	Smith	Desk	2	125
10 September 2014	Central	Bill	Pencil	7	1.29
18 September 2014	East	Richard	Pen Set	16	15.99
27 September 2014	West	James	Pen	76	1.99
05 October 2014	Central	Morgan	Binder	28	0.00

Fig 3.1 Dataset

This is a sample excel sheet which consist of order date, region, representative, item units and unit price.

So, to extend the data we have added another column of total price by multiplying the unit price with the number of units.

Total cost = ‘P6-OfficeSupplies – Batch 12’[Unit Price] * ‘P6- OfficeSupplies – Batch 12’[Units]

By using this command, we can create another column of total cost of the product of unit price and units. The updated excel sheet is:

OrderDate	Region	Rep	Item	Units	Unit Price	Total Cost
04 July 2014	East	Richard	Pen Set	62	4.99	309.38
12 July 2014	East	Nick	Binder	29	1.99	57.71
21 July 2014	Central	Morgan	Pen Set	55	12.49	686.95
29 July 2014	East	Susan	Binder	81	19.99	1619.19
07 August 2014	Central	Matthew	Pen Set	42	23.95	1005.9
15 August 2014	East	Richard	Pencil	35	4.99	174.65
24 August 2014	West	James	Desk	3	275	825
01 September 2014	Central	Smith	Desk	2	125	250
10 September 2014	Central	Bill	Pencil	7	1.29	9.03
18 September 2014	East	Richard	Pen Set	16	15.99	255.84
27 September 2014	West	James	Pen	76	1.99	151.24
05 October 2014	Central	Morgan	Binder	28	8.99	251.72

Fig 3.2 Updated Data**Monitor and Improve:**

Monitor the usage and feedback on the report to identify areas for improvement.

Update the report as needed based on user requirements and changing business needs.

By following these steps, you can successfully execute a Power BI financial analysis report and leverage its capabilities to gain valuable insights from your financial data.

CHAPTER – 4

RESULTS AND DISCUSSION

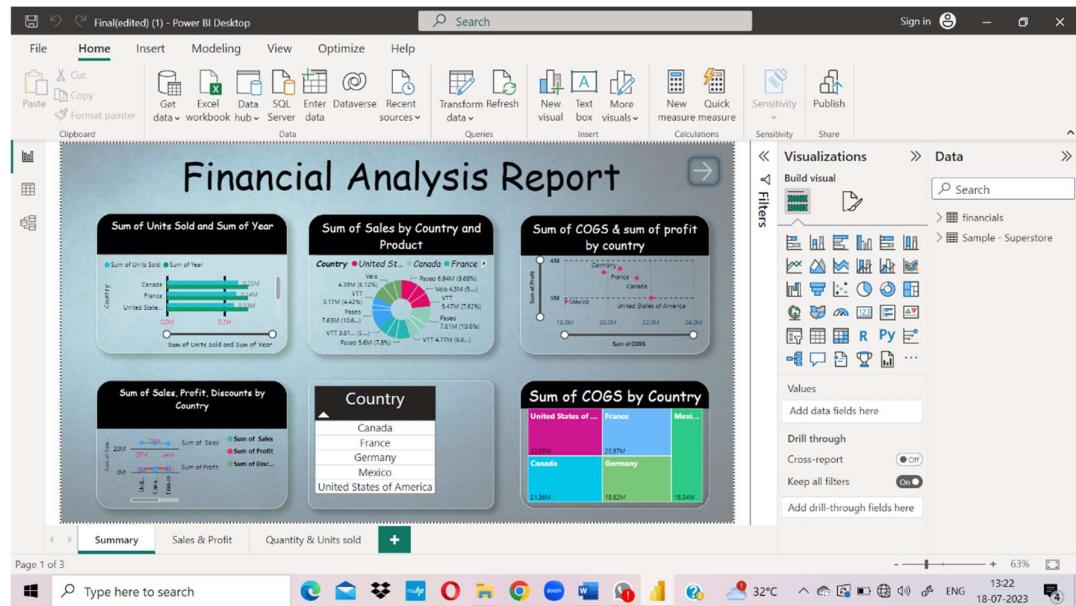


Fig 4.1 Summary

The first page of the financial analysis dashboard consists of follows:

- Sum of units sold and sum of year
- Sum of sales by country and product
- Sum of COGS and sum of profit by country
- Sum of sales, profit, discounts by country
- Sum of COGS by country

In the above given figure, it is the first sheet of the dashboard related to financial analysis report representing the summary of the above given list. Whenever one of the countries is selected from the given countries, it gives the specific details about that country in that sheet of the dashboard.

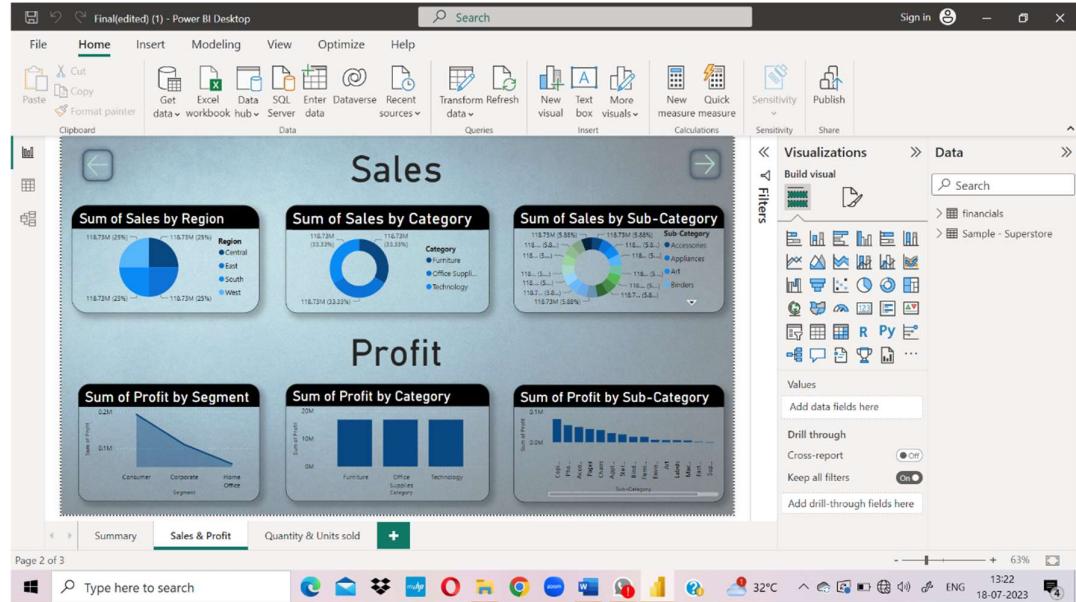


Fig 4.2 Sales and Profit

The second page of the financial analysis dashboard consists of follows:

- Sum of sales by region
- Sum of sales by category
- Sum of sales by sub-category
- Sum of profit by segment
- Sum of profit by category
- Sum of profit by sub-category

In the above given figure, it is the second sheet of the dashboard related to financial analysis report representing the sales and profit details about the company. Whenever one of the countries is selected from the given countries, it gives the specific details about that country in that sheet of the dashboard.

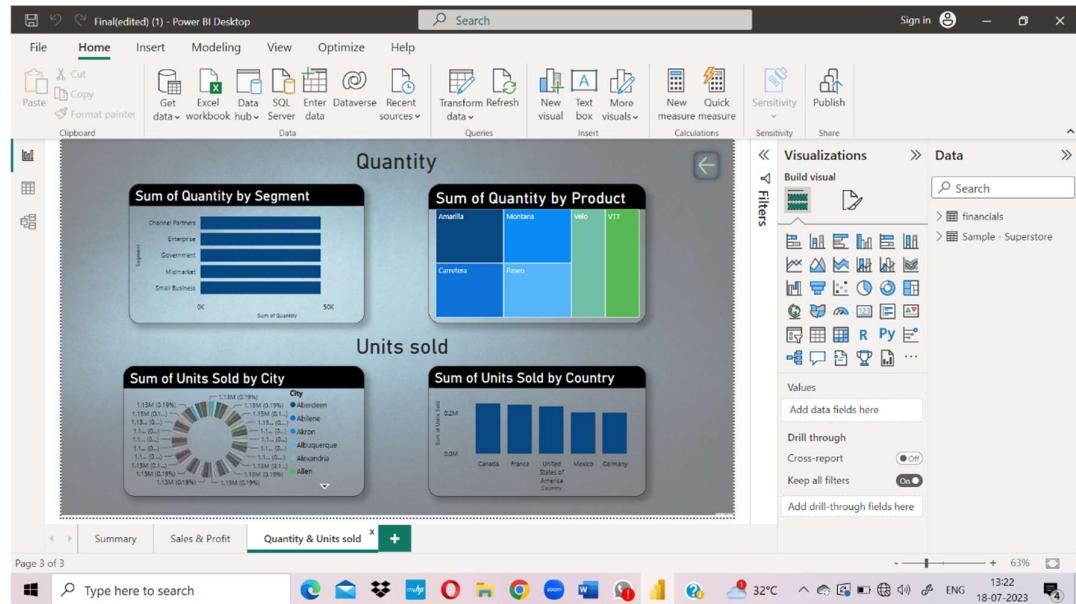


Fig 4.3 Quantity and Units Sold

The third page of the financial analysis dashboard consists of follows:

- Sum of quantity by segment
 - Sum of quantity by product
 - Sum of units sold by city
 - Sum of units sold by country

In the above given figure, it is the third sheet of the dashboard related to financial analysis report representing the quantity details and units sold by the company. Whenever one of the countries is selected from the given countries, it gives the specific details about that country in that sheet of the dashboard.

CHAPTER – 5

CONCLUSION

The Power BI financial analysis report provides valuable insights and a comprehensive overview of the financial performance of the company during the specified period. After analyzing the data and visualizations, several key conclusions can be drawn from the report:

- Financial Performance Overview
- Revenue and Sales Analysis
- Cost Analysis
- Profitability Assessment
- Expense Management
- Cash Flow Analysis
- Financial Ratios
- Key Performance Indicators (KPIs)
- Budget Variance Analysis
- Financial Forecasting

The interactive and user-friendly dashboards and reports have empowered stakeholders to explore data effortlessly, facilitating better understanding and interpretation of critical metrics. The project has enabled key decision-makers to make informed choices that have positively impacted business strategies, resource allocation, and customer engagement.

Overall, the Power BI financial analysis report serves as a valuable tool for stakeholders, executives, and management to make informed decisions, set strategic objectives, and address any potential financial challenges.

However, it is important to note that the accuracy and reliability of the report depend on the quality of the underlying data and the assumptions made during the

analysis. Therefore, continuous data validation and updating are essential for maintaining the report's relevance and usefulness.

The mobile and embedded analytics capabilities will ensure that insights are available at the fingertips of our stakeholders, whether they are in the office or on the move. Furthermore, data collaboration and sharing will foster a data-driven culture, encouraging collective insights and fostering innovation across the organization.

To maintain the success of this project, it is crucial to prioritize data security, governance, and compliance as we scale and expand the implementation. By adhering to these principles, we can ensure data integrity and build trust among users and stakeholders.

In conclusion, our Power BI project has proven to be a powerful tool for analyzing sales performance and trends, providing valuable insights to drive data-driven decision-making within the organization. Through this project, we have gained significant insights into various aspects of sales data, helping us identify patterns, uncover opportunities, and address challenges.

CHAPTER - 6

FUTURE SCOPE

The Power BI financial analysis report provides valuable insights and a comprehensive overview of the financial performance of the company during the specified period. After analyzing the data and visualizations, several key conclusions can be drawn from the report:

Financial Performance Overview:

The report presents a clear picture of the company's financial health, indicating positive trends and potential areas of concern.

Revenue and Sales Analysis:

The report highlights revenue trends, including the overall growth rate, key revenue drivers, and any fluctuations in sales. This insight helps to identify the company's core revenue streams and their performance over time.

Cost Analysis:

The cost analysis section sheds light on the major cost components, cost trends. Understanding cost structures is crucial in assessing the company's profitability.

Profitability Assessment:

Through various financial ratios and KPIs, the report evaluates the company's profitability. This includes measures like gross profit margin, net profit margin.

Expense Management:

The report delves into the company's expense management, identifying areas where cost control measures can be applied, potentially leading to improved financial results.

Cash Flow Analysis:

Understanding the company's cash flow is vital for its financial stability. The

report analyzes operating, investing, and financing activities to assess cash flow trends.

Financial Ratios:

The report calculates and interprets essential financial ratios, such as liquidity ratios (e.g., current ratio), solvency ratios (e.g., debt-to-equity ratio), and efficiency ratios (e.g., inventory turnover). These ratios provide insights into the company's financial strength and performance.

Key Performance Indicators (KPIs):

The report identifies and tracks critical KPIs, such as customer acquisition cost (CAC), customer lifetime value (CLV), and customer churn rate. These KPIs help gauge the company's operational efficiency and customer retention.

Budget Variance Analysis:

By comparing actual financial results with the budgeted figures, the report highlights areas where the company has exceeded or fallen short of its financial targets. This insight aids in evaluating the effectiveness of budget planning and execution.

Financial Forecasting:

Utilizing historical data and trends, the report provides forecasts and projections for the company's financial performance, assisting in decision-making and future planning.

Overall, the Power BI financial analysis report serves as a valuable tool for stakeholders, executives, and management to make informed decisions, set strategic objectives, and address any potential financial challenges.

However, it's important to note that the accuracy and reliability of the report depend on the quality of the underlying data and the assumptions made during the analysis.

Therefore, continuous data validation and updating are essential for maintaining the report's relevance and usefulness.

CHAPTER - 7

REFERENCES

Microsoft Power BI Documentation:

The official Microsoft Power BI website provides comprehensive documentation on how to use Power BI for financial analysis. You can find various tutorials, guides, and examples to help you get started and create financial reports. Visit the Power BI documentation site at: <https://docs.microsoft.com/en-us/power-bi/>

Power BI Community:

The Power BI community is an excellent resource to interact with other users, ask questions, and share knowledge about financial analysis in Power BI. You can find sample reports, templates, and tips from experienced users. Explore the community forums at: <https://community.powerbi.com/>

Power BI Blog:

Microsoft's Power BI team often shares tips, tricks, and updates on their official blog. You can find articles related to financial analysis and reporting to stay up-to-date with the latest features and best practices. Check out the Power BI blog at: <https://powerbi.microsoft.com/en-us/blog/>

Online Courses:

Several online platforms offer courses specifically focused on Power BI for financial analysis. Websites like Udemy, Coursera, LinkedIn Learning, and Pluralsight have various courses that you can enroll in for in-depth learning.

Books:

There are books available that cover Power BI for financial analysis and reporting. Look for titles that focus on financial analytics, business intelligence, and data visualization using Power BI.