



Data Analyst to Financial Analyst: What Comes After SQL, Python, and R?

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“I KNOW SQL, PYTHON AND R, WHAT ELSE CAN I LEARN?”

Financial Concepts

1. Financial Statements
2. Financial Ratios
3. Investment Fundamentals
4. Corporate Finance
5. Accounting Principles
6. Financial Modeling
7. Automation Analysis

Technical Skills

1. Advanced Excel
2. Financial Modeling Tools: Bloomberg Terminal, SAS
3. ETL tools: SQL, PowerQuery, PowerPivot, Alteryx
4. Data Visualization Tools: Tableau, PowerBI

Financial Analyst Skills

Certifications

1. CFA: Certified Financial Analyst
2. FRM: Financial Risk Manager
3. CFP: Certified Financial Planner
4. CIIA: Certified International Investment Analyst
5. CIMA: Certified Investment Management Analyst

Workplace skills

1. Communication
2. Negotiation and influencing
3. Critical thinking
4. Flexibility
5. Resilience
6. Collaboration
7. Problem-solving
8. Business Acumen
9. Networking



KNOW THE DIFFERENCE!

FINANCE

- Finance is more forward-looking, focusing on financial planning, investment, and growth strategies.
- Managing and allocating assets, investments, and resources to maximize returns or support strategic goals.
- Includes subfields like corporate finance, investment finance, personal finance, and public finance.

ACCOUNTING

- Accounting is more backward-looking, focusing on financial record-keeping, compliance, and reporting.
- Involves recording, analyzing, and reporting financial transactions.
- Accountants create financial statements, maintain ledgers, ensure compliance with regulations, and perform audits



“ALL THE WORLD’S A STAGE...”

Data Visualization

- Consider using templates.
- No walls of text.
- Be mindful of colors and fonts.
- Use animation sparingly.
- Engage your audience.

Storytelling

Presenting financial data in a way that tells a coherent story.

- Listen to client
- Understand requirements and data
- Deliver insights
- Present the full story

PRESENTATION SKILLS

POWERPOINT, GOOGLE SLIDES,
PREZI, TABLEAU, POWERBI

Audience Awareness

Understanding the audience's knowledge level and tailoring the presentation accordingly.

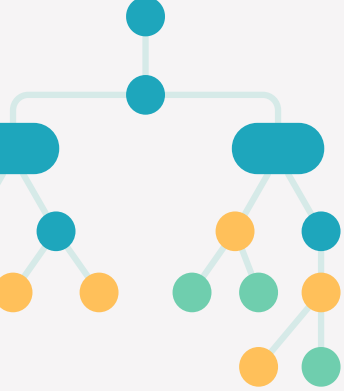
Effective financial analysts can communicate with both technical and non-technical stakeholders.

Clarity and Simplicity

- Be clear, concise, and straightforward
- Avoid complex jargon
- Keep it simple
- LESS IS MORE!
- PRACTICE! PRACTICE! PRACTICE!



DECISIONS, DECISIONS...



Get Data

**Transform
data**

**Identify which
algorithm to
use**

**Train and
Test**

**Visualize
performance
of algorithm**