

Project Report

Corporate Financial Analysis – Performance & Risk Insights

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Project Overview

For this project, I designed and implemented a comprehensive **Corporate Financial Analysis Dashboard** using **Power BI** for data cleaning, Modeling, DAX-driven measures, and interactive visualization.

The primary goal was to evaluate the financial health of an organization, track revenue and expense performance, analyze profitability trends, and assess risk exposure. The dashboard is structured as a **storytelling experience**, guiding stakeholders through multiple perspectives of financial data to support **strategic decision-making**.

The workflow began with importing and cleaning the raw dataset in **Power Query**, ensuring accuracy, consistency, and proper formatting. Data preparation steps included handling missing values, removing duplicates, correcting data types, and standardizing field names.

A robust **data model** was created in Power BI by establishing relationships between fact and dimension tables. I then developed multiple **DAX measures and calculated columns** to compute financial KPIs such as Net Profit, Gross Margin, Expense Ratios, and Risk Indicators.

Finally, I designed **five interactive dashboards** that together form a narrative-driven analysis: **Executive Summary, Revenue & Profit Analysis, Expense & Budget Tracking, Financial Performance, and Risk Metrics**. These dashboards highlight performance trends, cost drivers, and risk exposure, enabling leadership to take proactive financial decisions.

Business Questions Answered by the Dashboard

- What is the overall financial performance of the company (Revenue, Expenses, Profit)?
- Which business segments or regions contribute the most to revenue and profit?
- How do actual expenses compare to planned budgets?
- What are the profit margin trends over time?
- Which areas of the business present the highest financial risk?
- How do risk indicators (e.g., debt ratio, expense variance) impact business stability?
- Where should management focus to optimize profitability and minimize risk exposure?

Tools Used

- **Power Query** (Data Cleaning & Transformation)
- **Power BI Desktop** (Data Modeling, DAX Calculations, Visualization)
- **DAX (Data Analysis Expressions)** for advanced measures and KPIs
- **Interactive Slicers & Filters** (Region, Department, Time Period)

Concepts Used

- **Data Cleaning & Preparation:** Removing duplicates, correcting data types, standardizing formats in Power Query
- **Data Modeling:** Star schema design, relationships between fact tables (financial transactions) and dimension tables (time, department, region)
- **DAX Calculations:**
 - Revenue, Total Expenses, Net Profit
 - Profit Margin %, Expense-to-Revenue Ratio
 - Variance analysis (Actual vs. Budget)
- **Visualization Techniques:**
 - KPI Cards (Revenue, Expenses, Net Profit)
 - Waterfall Charts (Profit breakdown)
 - Line & Area Charts (Trends over time)
 - Donut/Bar Charts (Revenue by department, region)
 - Risk Metrics dashboard (Variance & Ratios)
- **Dashboard Design Principles:**
 - Storytelling with multiple dashboards
 - Consistent KPI placement & formatting
 - Use of color coding
 - Interactivity through slicers and filters

Outcome & Impact

The project successfully provided a **view of corporate financial performance**, integrating revenue, expenses, profitability, and risk insights into one analytical framework.

- Executives can now track **financial KPIs at a glance**.
- Department managers can compare **actual vs. budgeted performance**.
- Risk analysis helps the business identify **cost overruns and debt exposure early**.
- The dashboards empower decision-makers with **real-time, data-driven insights**, driving financial stability and long-term profitability.