Financial Report & Dashboard for XYZ Company

Project Type: Financial Analysis & Business Intelligence

Overview

This interactive **Power BI dashboard** provides a **comprehensive financial analysis** of XYZ Company's key performance indicators, including **sales, orders, profit, discounts, and customer profitability** across multiple dimensions such as **country, product, and customer type**. The dashboard is designed to help stakeholders quickly **identify trends, compare performance against the previous year, and make data-driven decisions**.

Key Insights & Features

1. **Sales & Profit Analysis**

   o Total **gross sales**: $127.93M, with a **net sales** value of $118.73M.

   o The company achieved a **total profit of $16.89M**, marking a significant **235.58% growth compared to last year**.

   o **Profit margin** is at **14.1%**, showing a slight decline of **-3.97%** from last year.

2. **Country-Wise Performance**

   o The **United States (25M), Canada (24.9M), and France (24.4M)** are the top-performing countries in terms of sales.

   o **Orders by country** show that **Canada (247K) and France (241K)** have the highest order volumes.

   o **Profit margin by country** reveals that **Germany and France** have the highest profit margins at **16% each**, while the **United States has the lowest at 12%**.

3. **Product & Customer Profitability**

   o **Top-selling products**:

      ▪ **Paseo (33M sales), VTT (21M), and Velo (18M)** contribute the most to total revenue.

   o **Customer Type Profitability**:

      ▪ **Channel partners** are the most profitable segment with an average profit margin of **73.1%**.

      ▪ **Midmarket and Government customers** have significantly lower profit margins at **27.7% and 21.7%**, respectively.

4. **Discount Analysis**

   o Discounts are categorized into **High (57.8%), Medium (32.6%), and Low (9.6%)**.

   o The visualization helps identify how discounts impact sales and profit margins.

5. **Sales Trend Analysis (2013-2014)**

   o A **line chart** highlights the **fluctuations in sales performance** over time, helping identify seasonal trends and spikes.

Technical Stack & Implementation

- **Data Source**: Cleaned and processed data from a financial database.

- **Power BI Features Used**:

  o DAX measures for dynamic calculations.

  o Interactive visuals, including **bar charts, tree maps, line charts, and donut charts**.

  o **Slicers and filters** for drill-down analysis.

  o **Conditional formatting** to highlight key insights.

Impact & Business Value

- Helps the **finance team and executives** quickly assess overall business performance.

- Enables **data-driven decision-making** by providing clear visibility into sales trends, customer profitability, and discount strategies.

- Identifies **top-performing regions and products**, helping in **strategic planning and pricing optimization**.

Why This Project Stands Out

- **Business-Focused**: Designed for **stakeholders and decision-makers**.

- **Real-World Application**: Simulates a **corporate financial dashboard** used in companies.

- **Advanced Power BI Features**: Demonstrates **DAX, visual storytelling, and interactivity**.