

Build a DRIP Modeling Dashboard

Part II : Data Visualization ~ 30 July 2025

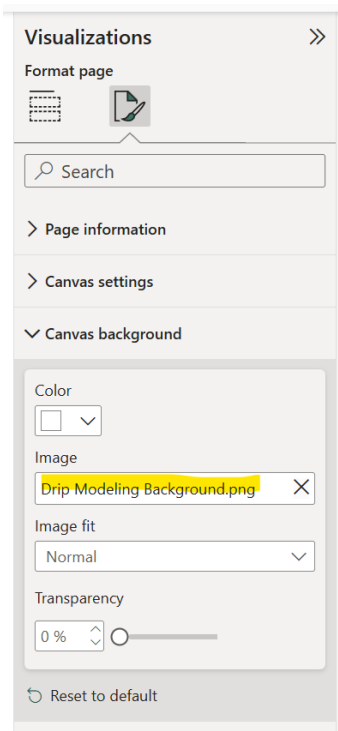
Pre-Requisites:

- Download [Power BI Desktop](#) (totally free).
 - If you are a MAC user, [here is the quickest solution](#) (use the free trial).
- Download [DRIP Modeling Dashboard – DATA.pbix](#) (this will be our starting point tonight).
 - **IMPORTANT:** Do not click 'Refresh' on tonight's report until you are done building your visuals (you'll need to update your Sources first).

Custom Background:

Use a custom background (PNG created in PowerPoint) to create sleek containers for your visuals.

- Download the [Drip Modeling Background.png](#)
- Open DRIP Modeling Dashboard – DATA.pbix
- In Report View, click on any blank area of the report (not a visual), open the Visualizations pane (on right) > format tab (paintbrush icon) > Canvas background > **browse & select PNG for Image:**



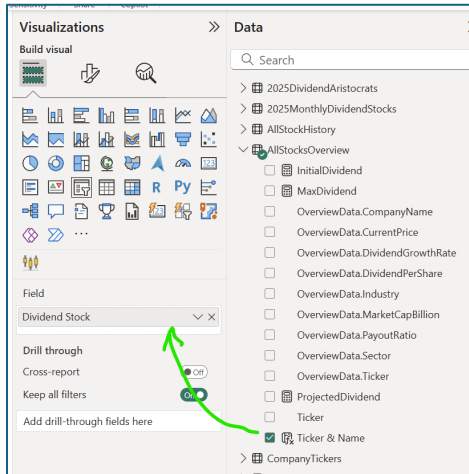
- Arrange your five What-If slicers inside the background container. Leave a little room at the right. Here's what I have for the finished product:



Stock Slicer:

Add a slicer to select which stock you want to inspect. This will go on the top-left of the report.

- First make sure nothing is selected on the report. (Always check with new visuals.)
- On the visualizations pane, select the slicer visual (has a little filter icon).
- From the Data pane, expand the AllStocksOverview table and check the box for Ticker & Name:



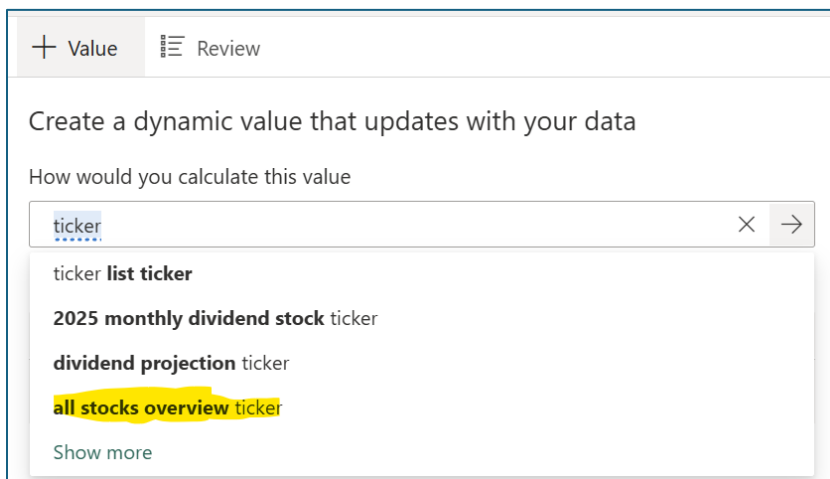
- Go to the Visualization format tab > Slicer settings > Selection > **toggle On the Single select**
- Format visualization to your liking. Here was my finished product:



Dashboard Title:

Create a dynamic title using a data field.

- From top ribbon bar, go to Insert > Elements (section) > **Text box** (this will go top-center).
- In your new text box, click 'Value', type "ticker" and select **all stocks overview ticker** and Save:



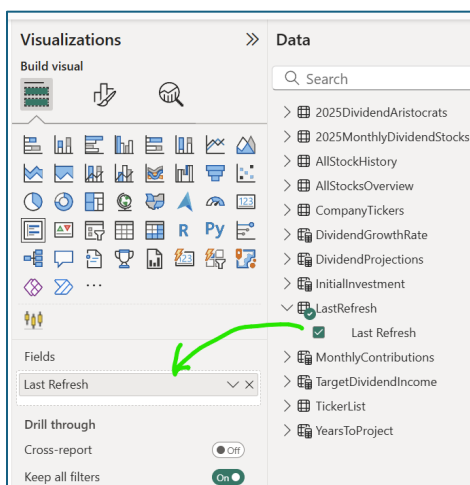
- In the text box, you should see a ticket value. Before it, type **“DRIP Modeling for O**
- In the Format Text Box pane, format however you like. Here’s my finished product:



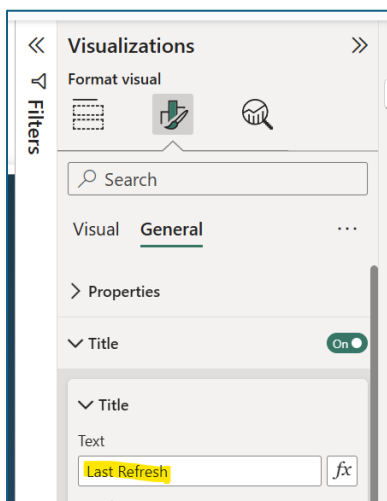
Last Refresh Card:

It’s always good to have an indication of when your report was last refreshed.

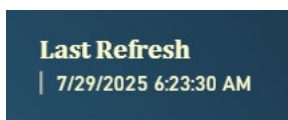
- On the visualizations pane, select the Multi-row Card visualization (this will go on top-right).
- From the Data pane, expand the LastRefresh table and check the box for **Last Refresh**:



- Go to the Visualization format tab > General > **Title (toggle On)** > Title > Text and type “Last Refresh”:



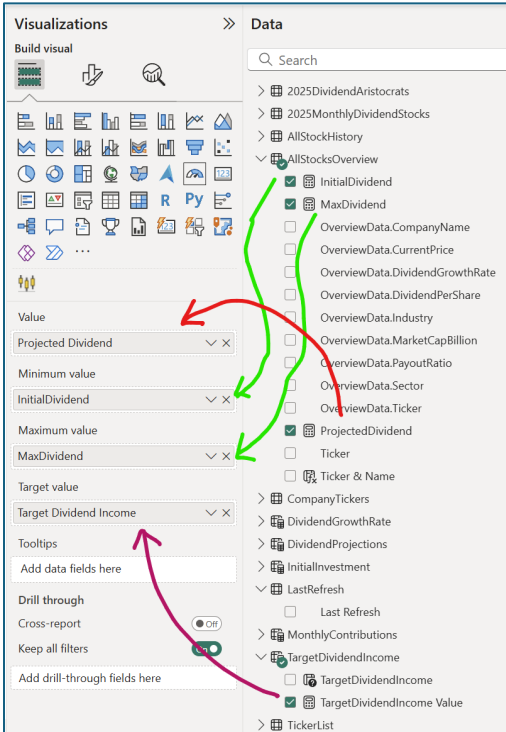
- Format the card however you like. Here’s my finished product:



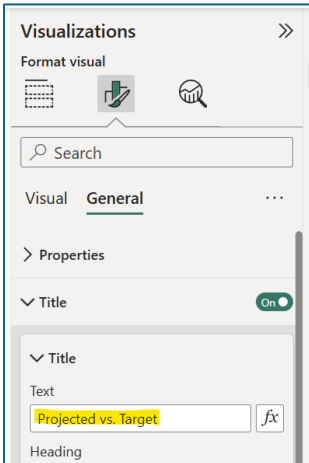
Projected vs. Target Gauge:

This visual will use all What-If parameters together to show whether you will meet your goal.

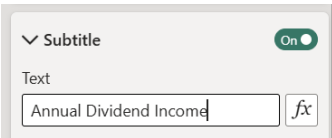
- On the visualizations pane, select the Gauge visualization (this will go in that blank space we left to the right of the background container).
- From the Data pane, expand the AllStocksOverview and TargetDividendIncome tables and drag the following fields to your visual as shown:



- Go to the Visualization format tab > General > Title (**toggle On**) > Title, and enter **“Projected vs. Target”**:



- Toggle on Subtitle and enter **“Annual Dividend Income”**:

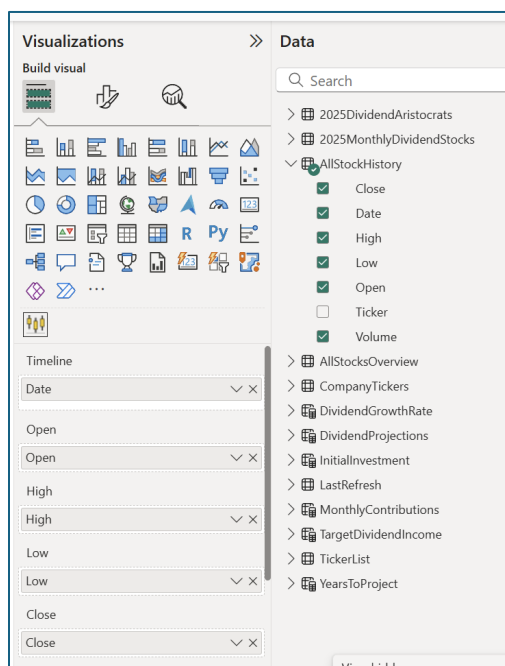


- You can format as you like, here is what I ended up with:



Candlestick Graph:

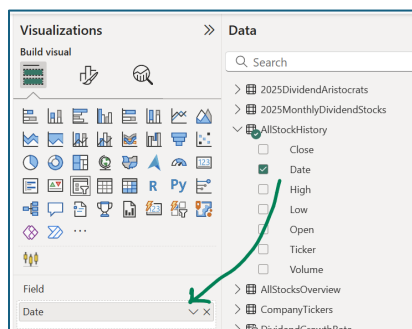
- On the visualizations pane, select the **Candlestick** visualization (this will go on the bottom-left).
- From the Data pane, expand the AllStocksHistory table and drag the following fields to your visual as shown (the Volume field is off-screen):



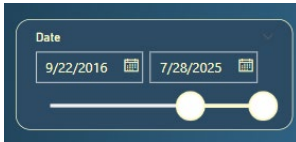
Date Slicer (for Candlestick):

This slicer will be used to control the date range for the Candlestick chart.

- On the visualizations pane, select the slicer visual (this will go above and to the left of chart).
- From the Data pane, expand the **AllStocksHistory** table and check the box for **Date**:



- Format the slicer as you like, here's what I had:



Dividend Cards:

Create three cards to display Current Price, Initial Dividend and Projected Dividend.

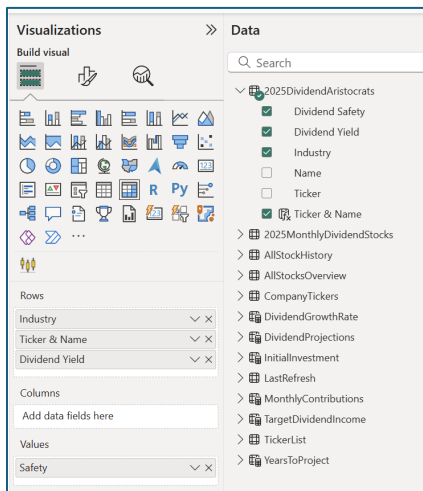
- On the visualizations pane, select the card visual (this will go in the center of the dashboard).
- From the Data pane, expand the **AllStocksOverview** table and select **OverviewData.CurrentPrice**, **InitialDividend** and **ProjectedDividend** for the three cards.
- Format the cards as you like:



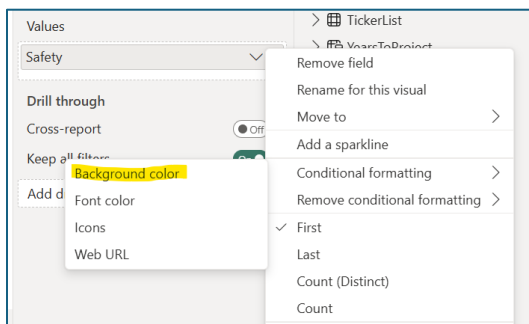
Research Area Matrix:

Create a matrix visual to display stocks you want to consider investing in.

- On the visualizations pane, select the matrix visual (this will go on bottom-right).
- From the Data pane, expand the **2025DividendAristocrats** table and select the fields as shown:



- Under 'Values', go to Conditional Formatting > Background Color:



- Create a following rules for a conditional background color:

Background color - Safety

Format style

Rules

Apply to

Values only

What field should we base this on?

Safety

Summarization

First

Rules

11 Reverse color order

+ New rule

If value is Very Safe then

If value is Safe then

If value is Borderline Safe then

Format the table as you please:

Research Area

Industry	Safety
Aerospace and Defense	Very Safe
Agricultural Products	Safe
Air Freight and Logistics	Borderline Safe
Application Software	Very Safe
Asset Management and Custody Banks	Safe
Biotechnology	Safe
Building Products	Very Safe
Distillers and Vintners	Very Safe
Distributors	Safe
Diversified Support Services	Very Safe
Electric Utilities	Safe
Electrical Components and Equipment	Safe