**INVESTMENT: 10,000 PKR**

*Mastering*

# Financial Data Analysis

## with Excel Power Query & Power Pivot

BrainicTech
Innovation Intelligence

| 28th, 30th July, 4th & 6th August, 2025 | Monday & Wednesday | 7:30 pm to 9:30 pm | 4 Days Session | Mode: Online |
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### Course Objective

This course aims to equip finance professionals with hands-on skills to efficiently clean, transform, model, and visualize financial data using Excel Power Query, Power Pivot, and Power BI Service. By mastering these tools, participants will be able to automate reporting processes, perform advanced financial analysis, and deliver impactful dashboards that support strategic financial decision-making.

### Learning Outcomes

By the end of this course, participants will be able to:

- Understand the role of Business Intelligence in financial data analysis and decision-making.
- Identify and connect to various financial data sources including Excel files, databases, and web data.
- Clean and transform raw financial data using Power Query, including merging, unpivoting, and creating custom columns.
- Build data models with Power Pivot by establishing relationships and creating calculated fields using DAX.
- Implement time intelligence functions such as YTD, MTD, QTD, and running totals for periodic analysis.
- Calculate key financial ratios like ROA, ROE, and liquidity metrics for performance evaluation.
- Design interactive dashboards in Excel using pivot tables and visualizations for financial reporting.
- Publish and share reports securely using Power BI Service for collaborative analysis and real-time access.

### Who Should Attend:

- **Finance Managers**
- **Internal Auditors**
- **Business Analysts**
- **Controllers**
- **Compliance Officers**

*Trainer*

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Data Consultant

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COURSE CONTENTS

### Module 1:

Introduction to Financial Data & BI Tools

- Understanding BI in the Financial Sector
- Overview of Excel Power Query, Power Pivot & Power BI Service
- Data Types in Financial Institutions (Core Banking, ERP, Risk Systems)
- How BI Supports Financial Decision-Making

### Module 2:

Power Query in Excel - Data Cleaning & Transformation

- Importing Data from Excel, CSV, SQL & Web
- Merging and Appending Financial Datasets
- Unpivoting Financial Reports (P&L, Balance Sheet)
- Data Cleansing, Filtering, and Replacing Errors
- Creating Custom Columns and Date Tables
- Using Parameters and Query Dependencies

### Module 3:

Data Modeling with Power Pivot in Excel

- Understanding Data Modeling Concepts
- Building Relationships Between Tables (GL, Cost Centers, Accounts)
- Creating Measures and KPIs using DAX
- Time Intelligence: YTD, MTD, QTD, Running Totals
- Financial Ratio Calculations (ROA, ROE, Liquidity Ratios)
- Dashboard Creation using pivot table and visualization

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