MERCURY

Power BI Financial Analysis Training Course

23 – 27 August 2027
Vienna (Austria)



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Ref: 15799_1081388 **Date:** 23 – 27 August 2027 **Location:** Vienna (Austria) **Fees:** 5900 Euro

Introduction:

Welcome to the Power BI Financial Analysis training course, where finance meets innovation through data visualization and business intelligence. Analyzing and interpreting financial data is crucial for informed decision-making in today's rapidly evolving financial landscape. It equips participants with the skills and knowledge to leverage Microsoft Power BI, a leading business analytics tool, to transform raw financial data into actionable insights.

In this Power BI Financial Analysis training, participants will learn the fundamental concepts of financial analysis, including key performance indicators, financial ratios, and data storytelling. They will explore how to connect to various data sources, create interactive dashboards, and generate compelling reports that enhance data-driven decision-making processes.

Participants in this Power BI Financial Analysis course will proficiently use Power BI to conduct comprehensive financial analyses, enabling them to present their findings with clarity and confidence to stakeholders. They will elevate their financial analysis capabilities and harness the power of data visualization for strategic financial planning and performance evaluation.

The Power BI Financial Analysis training course equips professionals with the skills to use Power BI effectively for financial analysis. Learn how to perform financial performance analysis using Power BI, including financial statement analysis. It covers using Power BI for financial planning and analysis and creating detailed financial analysis dashboards.

Participants will explore how Power BI can be leveraged for financial reporting and insightful financial performance tracking. Whether focusing on financial analysis in Power BI or building dynamic financial analysis dashboards, this Power BI Financial Analysis course provides the essential tools to enhance your financial reporting and decision-making processes.

Targeted Groups:

- Financial Analysts.
- Accountants.
- Business Intelligence Professionals.
- Data Analysts.
- Finance Managers.
- Business Managers.
- Financial Controllers.
- IT Professionals in Finance.
- Anyone interested in enhancing their financial analysis skills using Power BI.

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Course Objectives:

At the end of this Power BI Financial Analysis course, the participants will be able to:

- Understand the fundamentals of financial analysis and reporting.
- Gain proficiency in navigating the Power BI interface and tools.
- Learn to connect and import financial data from various sources.
- Develop skills in data modeling and transformation for financial datasets.
- Create compelling financial dashboards and visualizations.
- Master the use of DAX for advanced calculations and metrics.
- Generate insightful reports that support data-driven decision-making.
- Enhance the ability to present financial insights effectively to stakeholders.
- Foster problem-solving skills using Power BI for financial scenarios.
- Build a comprehensive understanding of best practices in financial analysis.

Targeted Competencies:

By the end of this Power BI Financial Analysis training, the participant's competencies will:

- Proficiency in Power BI Interface.
- Data Modeling and Transformation Skills.
- Financial Data Visualization Techniques.
- Understanding of Financial Metrics and Ratios.
- Ability to Create Interactive Dashboards.
- Report Generation and Automation Skills.
- Data-Driven Decision-Making.
- Knowledge of DAX Data Analysis Expressions.
- Effective Data Storytelling.
- Problem-solving and Analytical Thinking.

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Course Content:

Unit 1: Introduction to Power BI and Financial Analysis:

- Overview of Power BI and its applications in finance.
- Understanding the components of Power BI: Power BI Desktop, Power BI Service, and Power BI Mobile.
- Introduction to financial analysis concepts and terminology.
- Importance of data visualization in financial reporting.
- Exploring the Power BI interface and workspace.
- Setting up Power BI for financial data analysis.

Unit 2: Data Acquisition and Transformation:

- Connecting to various financial data sources Excel, SQL, etc..
- Importing and cleaning data for analysis.
- Understanding Power Query Editor for data transformation.
- Using data types and formats effectively.
- Implementing data filtering and sorting techniques.
- Creating relationships between different datasets.
- Loading data into Power BI for analysis.

Unit 3: Data Modeling and DAX Fundamentals:

- Understanding the importance of data modeling in financial analysis.
- Introduction to Data Analysis Expressions DAX.
- Creating calculated columns and measures using DAX.
- Utilizing DAX functions for financial calculations e.g., SUM, AVERAGE.
- Building relationships between tables for accurate analysis.
- Understanding row context and filter context in DAX.
- Tips for optimizing DAX formulas for performance.

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Unit 4: Creating Visualizations and Dashboards:

- Principles of effective financial data visualization.
- Creating charts and graphs for financial reporting bar, line, pie charts.
- Designing interactive dashboards with slicers and filters.
- Utilizing KPI indicators to track financial performance.
- Customizing visuals for clarity and impact.
- Arranging and formatting dashboards for professional presentation.
- Sharing dashboards with stakeholders through Power BI Service.

Unit 5: Reporting and Data Storytelling:

- Importance of storytelling in financial reporting.
- Creating structured reports for various audiences.
- Combining multiple visualizations into cohesive reports.
- Using Power BI features to enhance data narratives.
- Best practices for report design and layout.
- Generating and exporting reports in various formats PDF, PowerPoint.
- Incorporating feedback for continuous improvement of reports.
- Evaluating financial performance through data-driven insights.