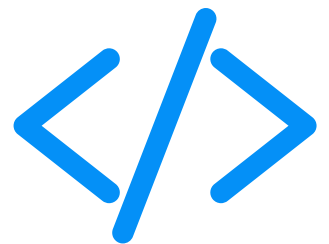


Financial Analyst Course Structure



Syllabus



Phase 1:

Excel for Financial Analysis

Phase 2:

Power BI Essentials

Phase 3:

Excel + Power BI Integration

Phase 4:

Python for Analysts

Phase 5:

Python for Analysts

Phase 6:

SQL + Python + Power BI(Integration)

Phase 7:

Capstone Projects

Phase 1: Excel for Financial Analysis ▼

- **Excel Basics – Cell formats, shortcuts, formulas**
- **Lookup Functions – VLOOKUP, HLOOKUP, INDEX, MATCH**
- **Logical Functions – IF, AND, OR, IFS**
- **Text & Date Functions – LEFT, RIGHT, MID, TEXT, TODAY()**
- **Pivot Tables, Pivot Charts, Grouping**
- **Conditional Formatting, Data Validation, Dropdowns**
- **Financial Functions – NPV, IRR, PMT, FV**
- **Scenario Manager, Goal Seek, What-If**
- **Mini Project: 3-statement model + dashboard in Excel**

Phase 2: Power BI Essentials



- **Power BI Intro, Interface, Loading data from Excel/CSV**
- **Data Transformation with Power Query**
- **Building Visuals – Bar, Pie, Line, Card, Table, Matrix**
- **Slicers, Filters, Drill-downs**
- **DAX Basics – SUM, AVERAGE, CALCULATE, FILTER**
- **Time Intelligence – YTD, QTD, MTD**
- **KPIs and Financial Visuals (Cash Flow, Revenue Breakdown)**
- **Mini Project: Financial Dashboard (P&L + KPIs)**

Phase 3: Excel + Power BI Integration

- **Using Excel as data source for Power BI**
- **Creating live dashboards from Excel reports**
- **Automating Monthly Reporting Process**
- **Project: Budget vs Actuals reporting system**

Phase 4: Python for Analysts



- **Using Excel as data source for Power BI**
- **Creating live dashboards from Excel reports**
- **Automating Monthly Reporting Process**
- **Project: Budget vs Actuals reporting system**

Phase 5: Power BI + Python



- **Running Python scripts in Power BI**
- **Data cleaning and transformation using Python**
- **Creating Python visuals in Power BI**
- **Case Study: Risk scoring using Python + Power BI**
- **Project: Dynamic forecast model using Python visuals in Power BI**

Phase 6: SQL + Python + Power BI (Integration)



- **SQL Basics – SELECT, WHERE, ORDER BY**
- **JOIN, GROUP BY, Aggregations**
- **Subqueries, CTEs, Window Function**
- **Connecting Power BI to SQL Server**
- **Automating analysis: SQL → Python → Power BI pipeline**
- **Project Setup: Financial Performance Tracker from DB**
- **Project Execution: End-to-End using SQL + Python + Power BI**

Phase 7: Capstone Projects



- **FP&A Dashboard for a Mid-sized Company -**

Build a full financial planning & analysis tool

- **Investor's Portfolio Analysis with Risk Metrics -**

Track and analyze a sample investment portfolio

- **Sales + Finance Performance Tracker for a Retail Chain -**

Create a finance-integrated sales intelligence system



- **Working Capital & Liquidity Tracker for an FMCG -**

Analyze working capital cycle, optimize liquidity

- **Financial Fraud Detection using Transaction Data -**

Detect unusual patterns in financial transactions

- **Company Performance Benchmarking (Sector Analysis) -**

Compare key metrics of 5 companies in the same industry



- **Personal Finance Tracker + Budget Planner -
Build a personal finance dashboard for monthly planning**
- **Fintech Loan Portfolio Dashboard -
Monitor and analyze a loan book**



Note :

**For other project list , please call your
academic counsellor**