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At EDUCBA, it is a matter of pride to us to make job oriented hands on courses available to anyone, any time and anywhere.

Learn at a time and place, and pace that is of your choice.

Plan your study to suit your convenience and schedule.

# Excel For Finance Course

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Email Contact: [info@educba.com](mailto:info@educba.com)



# EDUCBA

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[www.educba.com](http://www.educba.com)

# Course Overview

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Along with this, you also get verifiable certificates (unique certification number and your unique URL) when you complete these courses.

This course is dedicated entirely to financial analysts.

A financial analyst has to invest a lot of time building complex models and analyzing them.

# Excel For Finance Course Skills

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We learn the following skills:

MS Excel (basics & advanced): It's obvious that you will learn the basics and the advanced level Excel. Since this is completely focused on financial analysis, you will learn some additional features and functions that you may need while analyzing any of the financial statements of the company.

Generating Excel reports: This is one of the most common functions of a financial analyst. Learning the excel isn't enough.

# Course Features

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Course Duration-  
51+ Hours



Number of Courses



Verifiable  
Certificates



Lifetime Access



Technical  
Excellence

# About Financial Analysis

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Financial analysis is the art of reaching a concrete business decision by analyzing the financial data available to the company. Financial analysis can be divided into two parts –

**Decisions made by the external party:** As a company, you can go to a financial analyst and take her help in analyzing the financial statements of a target company.

**Decisions made by the internal party:** You can hire a financial analyst within your company to see how your company is doing in terms of financial impact.

## Excel For Finance Course

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This is a Bundle Course that includes complete in-depth Excel for Finance Learning Courses combined into one Complete Course.

This Bundle perfectly meets the requisite of the industry and gives you a better chance of being hired as a Excel For Finance professional.



# Microsoft Excel Course – Beginners

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## Section 1. Excel for Beginners - Overview

- Excel 2010 Beginner -  
Overview

## Section 2. Excel 2010 Getting Started

- Getting Started - Ribbons & Quick  
Access Toolbar
- Getting Started - Surfing Excel & HELP  
Function

## Section 3. Case Study

- Excel Case Study
- Data Entry in Excel
- Populating the Case Study in Excel

## Section 4. Calculations

- Calculations - Addition Subtract  
Multiply Division

## Section 5. Formulas

- Formulas - SUM MAX MIN AVERAGE

## Section 6. Formatting

- Formatting - Number Formats
- Formatting - Table Formats

## Section 7. Updating a Calculation

- Updating a Calculation

## Section 8. Percentages & Absolute References

- Percentages & Absolute References

## Section 9. Conditional Formatting

- Conditional Formatting

## Section 10. IF Function

- IF function

## Section 11. COUNTIF and SUMIF

- COUNTIF Function
- SUMIF Function

# 1

# Microsoft Excel Course – Beginners

## Section 12. Charts and Graphs

- Creating Charts and Graphs
- Create Pie Charts

## Section 13. Sorts and Filters

- Sorts
- Filters

## Section 14. Pivot Tables

- Pivot Tables

## Section 15. Freeze and Split

- Freeze and Split

## Section 16. Presentation

- Presentation - Table Formats
- Presentation - Indents and Formatting Charts

## Section 17. Print

- Printing the Worksheet
- Printing - Headers and Titles

## Section 18. Shortcuts

- Shortcuts - Formatting and Navigation
- Shortcuts - Selection, Data and Formula

## Section 19. Common Errors

- Common Errors

## Section 20. Concluding Lecture

- Basic Excel Conclusion

# 2

## Microsoft Excel – Advanced

### Section 1. Key Difference MS Excel 2007 vs 2010

- Office Button and Paste Function
- Sparklines Custom Ribbons and Screenshots
- Conditional Formatting and Equation Editor

### Section 2. Useful Excel Functions

- Paste Special
- Paste Special Base File
- Logical functions IF AND OR
- Arithmetic functions MAX MIN ABS
- Quiz Arithmetic Function
- COUNT COUNTIF COUNTA COUNTBLANK
- Cell Information

### Section 3. Data Functions

- CHOOSE Function
- VLOOKUP Function
- Vlookup Referencing Database File
- HLOOKUP Function
- Hlookup Referencing Database File

# 2

## Microsoft Excel – Advanced

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### Section 4. WhatIfAnalysis

- One Dimensional Data Tables
- Two dimensional Data Tables
- Solver

### Section 5. Arrays

- Array Function Introduction
- Array Function Row and Columns
- Array Function TRANSPOSE
- Array Function FREQUENCY

### Section 6. Functions for working with Text

- PROPER UPPER LOWER LEFT RIGHT MID
- Text and String Function
- FIND CLEAN REPT CONCATENATE

# 2

## Microsoft Excel – Advanced

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### Section 7. Pivot Tables

- Pivot Tables
- Pivot Table Filter Slicer
- Pivot Charts

### Section 8. Names and Dynamic Range

- Naming a Cell and a Range
- Names Dynamic Ranges

### Section 9. Auditing and Trouble Shooting formulas

- Auditing Toolbar
- Auditing Toolbar Base File
- Watch Window
- Watch Window Base File

### Section 10. Form Controls

- Group Boxes and Options Button
- Group Boxes and Options Button Base File
- Check Boxes
- Check Boxes Base File
- List Boxes and Combo Boxes
- Scroll Bar and Spinners





# Microsoft Excel – Advanced

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## Section 11. Important Excel Tools

- Text to Columns
- Grouping Tabs
- SUBTOTAL Function
- Hyperlinks
- Hyperlinks Base File
- Data Validation
- Random Numbers & others

## Section 12. Advanced Charts

- Excel 2010 Sparklines
- Range Charts
- Range Charts Area
- Funding Graph
- Funding Graph & others

# 3

# Microsoft Excel Charts and SmartArt Graphics

## Section 1. Introduction

- Introduction to Excel Charts and Smart Art Graphics

## Section 2. Pictures and Clip Arts

- Learning the HR Database
- Sales Productivity Database
- Learning how to insert pictures
- Study on Clip Arts
- Utilizing the Screenshot option
- Creating Shapes in Excel
- Creating Venn Diagram
- Excel Chart and Data Table
- Training on Charts
- Groupings for percentages and ratios

## Section 3. Pie charts and Line charts

- Pie charts for arts and graphics
- Label positioning in pie chart
- Line charts for trends over time
- Different options in Line charts
- Analyzing on the Doughnut chart

## Section 4. Bubble chart and surface chart

- Area chart for illustrating the magnitude
- Variation in bubble chart
- Rating and tenure in bubble chart
- Surface or surface area chart
- Example in surface chart

## Section 5. Pyramid charts and example

- Learning the Pyramids chart
- Example in Pyramid chart
- Mosaic or Mekko charts
- Graphical method in Radar chart
- Sunburst chart a multilevel pie chart

## Section 6. Dashboard Chart

- Dashboard Chart
- Thermometer Chart
- Map Chart

# 4

## Power Excel Training

### Section 1. Introduction

- Reference
- Introduction to Power Excel Training
- Analyzing Data to Make Business Decisions

### Section 2. Function

- Future Value Function
- PMT Function
- Quick Analysis
- Rate Function

### Section 3. Pivot Tables

- Pivot Tables
- Create Custom Groups in Pivot Table
- Set Conditional Formatting

### Section 4. Evaluate

- Troubleshooting and Enhancing Professional Workbooks
- Troubleshooting and Enhancing
- Name Range and Data Set
- Key Performance Indicator (KPI) In Excel

### Section 5. Date Forma and Time Format

- Analysis Data with Function
- Date Format
- Time Format

### Section 6. Statement and VLOOKUP

- Nested If Statement in Excel
- Count ifs and Sum ifs in Excel
- VLOOKUP In Excel

## Section 7. Future Value Function

- Future Value
- Epitomizing What If Analysis
- How to Create Scenario in Excel
- Creating Goal Seek in Excel
- How to Use Solver Tool in Excel

## Section 8. Business Information

- Business Information
- Creating a Dashboard of Sales
- Create hyperlinks for Sales
- Profit and Loss of Sales

## Section 9. Database Information

- Formulating the Design From Database Information
- Working with Data Table in Power Excel
- Adding New Column in Data Table
- Using Excel Function in Data Table
- Working With Data Filtering
- Data Subtotal Group and Ungroup

## Section 10. Data Comparison and Filter

- Data Comparison in Power Excel
- Data Filters and Slicers in Power Excel

## Section 11. Pivot Chart and Power View

- Pivot Chart in Power Excel
- Power View in Power Excel
- Working with Macros
- Example of Macros

# 5

## Microsoft Excel Reports

### Section 1. Introduction

- Introduction to Excel reports

### Section 2. Shortcut Function

- Shortcut Key Function - F6
- Shortcut Key Function - F10
- Formatting Text and Numbers
- F2 and Shift Plus F2
- CTRL Plus Apostrophe
- CTRL Plus Shift Plus Tilde

### Section 3. Excel Functions

- Entering a Formula
- Entering a Function
- Operator Precedence
- Name and Formula in Excel
- Count functions in Excel
- Sum Functions in Excel
- Counts of Logical Values in Excel
- Sum Product Function in Excel
- Average Counting Blank and Non Blank
- Offset and Concat Function in Excel

### Section 4. Vertical Lookups

- Vertical Lookups (v LOOKUPS)
- Horizontal Lookups (H Lookups)
- Match Function
- Left V Lookups
- Tow Ways Lookup
- Example of Lookups

### Section 5. Financial Function

- PMT Financial Function
- Loan with Different Terms
- PPMT and IPMT
- Example of PPMT and IPMT

# 6

## Microsoft Excel Simulations Training

### Section 1. Introduction

- Reference
- Introduction to Excel Simulations
- General Tips on Modeling in Excel

### Section 2. Data Simulation

- Data Simulation
- Single Reference Simulation
- Grid Reference Simulation
- Chart Simulation

### Section 3. Goal Seek

- Goal Seek

### Section 4. Table Simulations

- Table Simulations
- Data Table Simulation
- Scenario Manager Simulations
- Consolidation Simulations

### Section 5. Data Validation and Macro Filters

- Data Validation
- Macro Filters

### Section 6. Monte Carlo Simulations

- Monte Carlo Simulations
- Creating Simulations
- Forecast Sheet Simulations





# Financial Functions In Excel – Microsoft Excel 2013 Course

## Section 1. Analyzing Loans And Payments

- Understanding The Pmt Functions
- Understanding Ppmt And Ipmt
- Pmt Functions Continues

## Section 2. Calculating Rate Of Return

- Understanding Xirr
- Understanding Xnpv
- Understanding Npv And Irr And Graph
- Understanding Npv And Irr

## Section 3. Value Of An Investment With Multiple Cash

- Asset Valuation Using Dcf Analysis
- Multiple Cash Flows

## Section 4. Future Value, Si, Ci, Pv, Nper, Rate

- Lender And Borrower Fv
- Calculate Nper And Rate
- Understanding Pv
- Calculating Simple And Compound Interest
- Understanding Future Value

## Section 5. Excel Files

- Calculating value of an investment with multiple cash flows
- Calculating value of an investment with lump sum cash flows
- Calculating Rate of Return
- Bond Valuation
- Analyzing loans and payments

## Section 6. Bond Valuation

- Calculating The Duration
- Calculating The Yield



# Pivot Table In MS Excel

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## Section 1. Introduction

- Introduction to Pivot Table

## Section 2. Features

- Features of Pivot Tables
- Layouts
- Updating Data in Pivot

## Section 3. Formatting

- Generating Multiple Files
- Formatting Multiple Files

## Section 4. Questions

- Pivot Table - Questions



## Section 1. Introduction

- Reference
- Introduction to Power Pivot GUI
- Data Import

## Section 2. Formatting

- Data Formatting

## Section 3. Pivot Chart Example

- Pivot Chart

## Section 4. Pivot Table Example

- Creating Pivot Table
- Adding Min and Max Value

## Section 5. Pivot Table and Pie Chart

- Pivot Table and Pie Chart
- Insert Function and Formula
- Pivot Table Field
- Pivot Table Analysis
- Creating One to One Relationship
- Loan Applicants Analysis

## Section 6. Inserting slicer

- Inserting slicer
- Insert Loan Status
- Add Literacy and Province

# 10

## Advanced Excel 2016 – Some Important Features

### Section 1. Introduction

- Introduction to Advanced Excel 2016 Training

### Section 2. Shortcuts

- Keyboard Shortcuts
- Shortcuts - CTRL Plus ALT Plus F9
- Selecting Cells Columns and Rows

### Section 3. Excel Controls

- Excel Controls
- Option Button

### Section 4. Cell Comments

- Cell Comments

### Section 5. Named Ranges

- Named Ranges

### Section 6. Advanced Formulas

- Advanced Formulas
- Mixed Addresses
- Nesting Calculations
- Truth Table and Function
- Vlookup and Hlookup Functions
- Index Match and Small Functions
- Recording Macros

# 11

## Microsoft Excel Solver Tutorial

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### Section 1. Introduction

- Introduction to Excel Solver
- Describe Solver

### Section 2. Solver Example

- Solver Example

### Section 3. Solver For Simultaneous and Minimizing Shipping

- Solver For Simultaneous Linear Equation
- Solver For Minimizing Shipping Cost
- Excel Solver to Allocate Resources

## Section 1. Introduction

- Introduction to Mastering Excel Date and Time Mastering

## Section 2. Date and Time

- Date Value in Excel
- Time Value in Excel
- Date and Time in Excel
- Date and Time Formats

## Section 3. Function

- Datedif Function
- Timedif Function
- How to Calculate Hours in Excel
- Mastering Excel Date and Time
- Understanding Date Value
- Examples on Time Value
- Date and Time
- Date Time Formats
- Formula for Date and Time
- Time Difference
- Sign for Time Hour
- Calculation for Date and Time
- Function for Date Value



# 13

## Mastering Microsoft Excel Date and Time

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### Section 1. Introduction

- Introduction to Master Excel Dates and Times

### Section 2. Date Format and Function

- Date Format in Serial Numbers
- Date System in Excel
- Date Functions

### Section 3. Day Function

- Function which are use in Excel
- Background function and Work Day
- Example of Eomonth Function of Excel
- Function of Days 360 in Excel
- NETWORKDAY.INTL in Excel

### Section 4. Day Function

- Time Function
- Creating Time in Excel
- Applications Tips and Tricks in Excel
- Calculating Method using Excel Formula
- Convert time to Time Zone in Excel

## Section 1. Introduction

- Introduction to Heat Map
- Heat Map Example
- Formatting Rules for Dynamic Heat Map

## Section 2. Using Sales Data

- How to Create Heat Map Using Sales Data

## Section 3. Using Channel

- Displaying Data Using Channel
- Working with Cell Reference in Heat Map
- Displaying Data Using Direct Channel

## Section 1. Basics of Financial Analysis


- NPV and PV Function

## Section 2. NPV and PV Function

- Internal Rate of Return
- Analysis Using Function - Max  
Min and Sum If
- Summarizing Result for Easy  
Interpretation

## Section 3. Loan Schedule

- Loan and Loan Amortization  
Schedules



# Frequently Asked Questions

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Why should I do this course?

This is the best course on MS Excel for finance students and professionals. If you're a finance professional or a student, doing this excel for finance course will help you immensely. So, instead of asking why should you do this course, ask why not.

I'm not from a finance background. Can I still do this Excel for Finance course?

Ideally, the answer is no. But if you think unit wise other than looking at the whole course, you will learn a lot from this course. Let's say that you want to learn the MS Excel only and want to understand how it is applied in real life scenario, doing this excel for finance course will definitely help you.

If we compare between who do this Excel for Finance course and who doesn't, how both of these students/professionals are different?

Any investment in oneself reaps more rewards than not investing at all in oneself. If you decide to invest in yourself, this would help you bring more value to the table for your company and you will grow a lot in your professional life.





# Customer Reviews

“

This was a very informative course on financial functions in Excel that introduces formulas to determine Future Value, Present Value, Simple Interest, Compound Interest, NPER, Interest Rate, Multiple and Discounted Cash Flows, Rate of Return, PMT, and Bond Valuation among other Excel features. I appreciated the instructor's pace as well as the inclusion of multiple practice exercises.

Lucia Lopez Otal

”

Excel sheets provided are very helpful in practising the functions at the end of each module. Add a pdf document comprising of all the Financial Functions that had been taught in the course. It is very educational and I enjoyed every bit of it and recommend this course 100%.

ADITYA CHANDRA

”

This course is very unique, simple and easy to understand and I'm damn sure it will be very helpful in my career. This course is particularly for a person who wants to learn financial functions practically. I definitely recommend this course to my friends.

Bharath r



**EDUCBA**

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# Excel For Finance Course

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For Queries please contact:

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