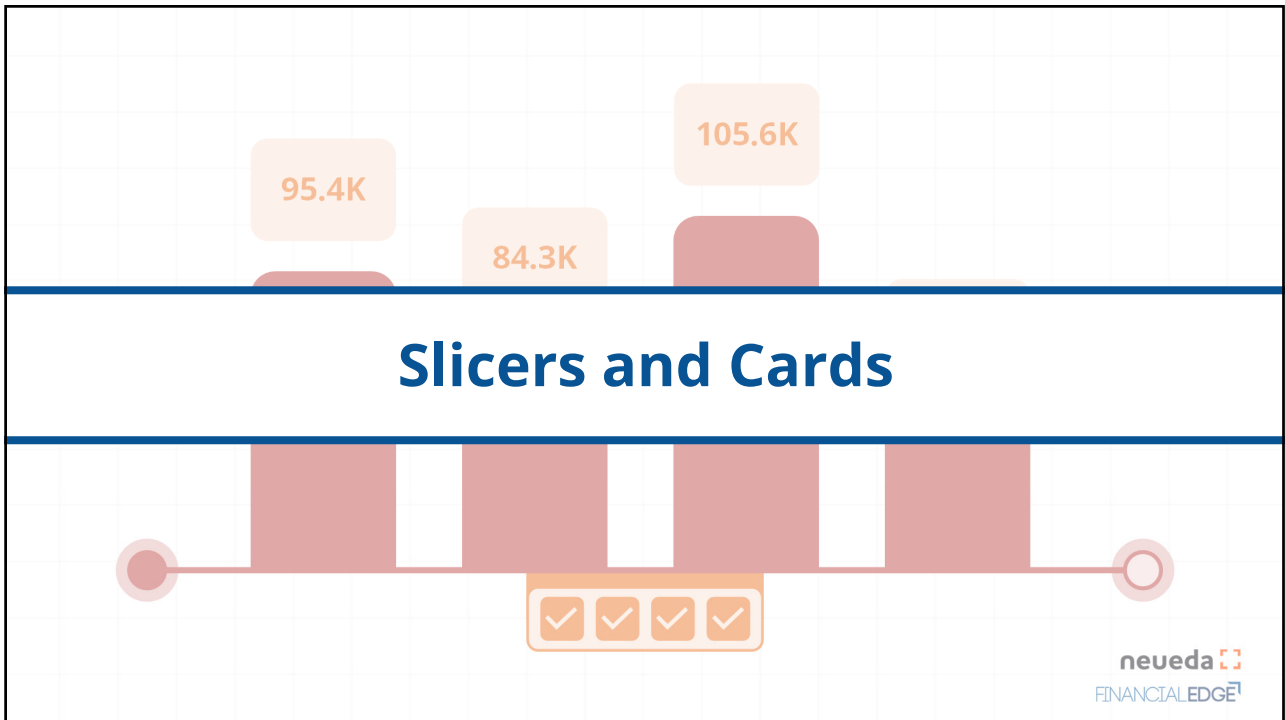
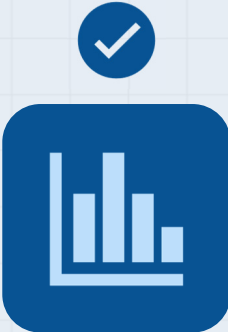


# Visualizing Data with Power BI Charts

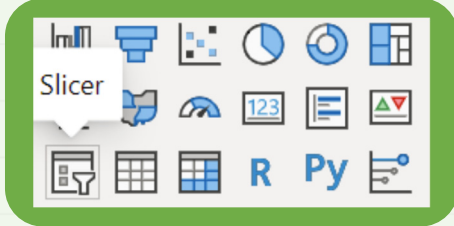
FINANCIALEDGE<sup>1</sup>

neueda 

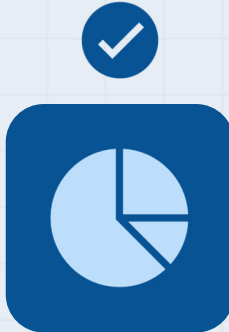





**Column &  
Bar Charts**



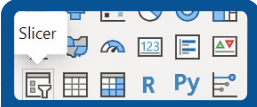
**Slicers  
& Cards**




**Pie  
Charts**

neueda   
FINANCIALEDGE<sup>1</sup>


## Slicers






Used to  
filter data

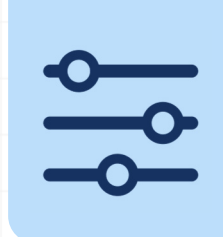
CURRENCY / YEAR




Visuals  
automatically  
update



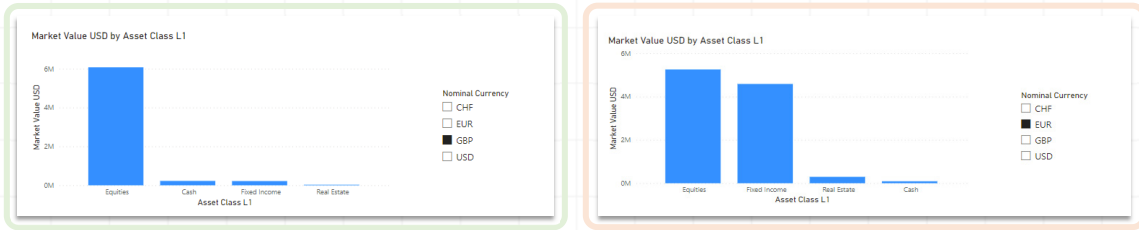
Interactive data  
to explore  
trends



Multiple filters  
on 1 page

neueda   
FINANCIALEDGE<sup>1</sup>

## Using a Slicer Visual



How **totals differ** depending on the currency

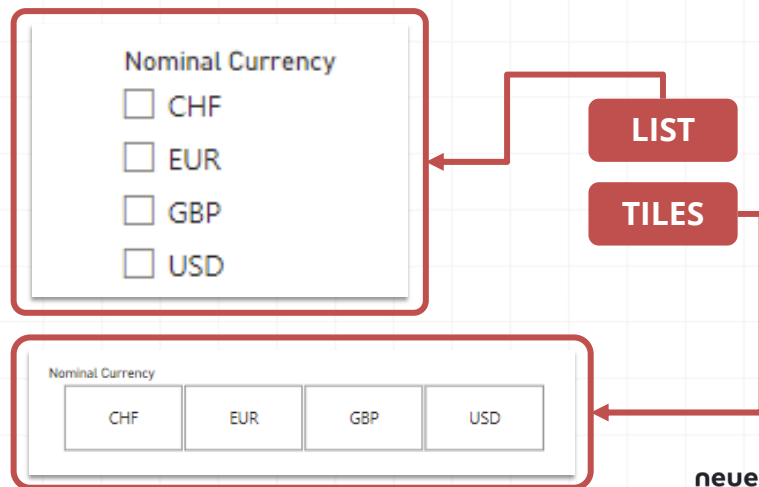


List / Tiled

Drop Down

Timeline

## Formatting a Slicer Visual



List / Tiled

**Drop Down**

Timeline


## Formatting a Slicer Visual

Nominal Currency

All

Good option for limited space

Display full list



List / Tiled

Drop Down


**Timeline**

## Formatting a Slicer Visual


Date

01/01/2019 25/10/2024

Display date/time fields on a timeline




## Cards




Display key numbers & stats

6.53M <small>Market Value USD</small>	284.09K <small>Average of Market Value USD</small>	23 <small>Number of Holdings</small>
--	---	---




Range of calculations


SUM / AVERAGE / COUNT



Common to use multiple cards




Cards interact with slicers



## Tables and Matrix Visuals

	Q1	Q2	Q3	Q4
CASH	100,303	74,333	130,303	140,506
FIXED INCOME	203,404	180,045	250,453	290,296



Granular detail

Multiple columns

SUM numerical fields

Sorted alphabetically or numerically

Tables

Product	Asset Class L1	Asset Class L2	Nominal Currency	Market Value USD
AKBANK TAS (M) 31-Mar-25 (R) 5.125	Fixed Income	Emerging Market Debt	USD	1,614,964.82
AKBANK TAS (M) 31-Mar-25 (R) 5.126	Real Estate	Diversified Real Estate	CHF	58,444.11
AKBANK TAS (M) 31-Mar-25 (R) 5.127	Fixed Income	Developed Corporate Investment Grade	CHF	17,433.77
AKBANK TAS (M) 31-Mar-25 (R) 5.128	Fixed Income	Developed Corporate Investment Grade	USD	9,254.428
AKBANK TAS (M) 31-Mar-25 (R) 5.129	Fixed Income	Developed Corporate Investment Grade	USD	17,469.28
AKBANK TAS (M) 31-Mar-25 (R) 5.130	Equities	Developed Equities	USD	58,208.27
Alibaba Grp Sp ADS	Equities	Developed Equities	CHF	1,851.05
Alibaba Grp Sp ADS	Equities	Developed Equities	EUR	3,886.66
Alibaba Grp Sp ADS	Equities	Developed Equities	USD	58,272.79
Alibaba Grp Sp ADS	Equities	Emerging Market All Cap Equities	USD	82,458.26
Alibaba Grp Sp ADS	Real Estate	Diversified Real Estate	CHF	8,799.84
ALPHABET INC-CL.A	Equities	Developed Equities	EUR	503.72
ALPHABET INC-CL.A	Equities	Developed Equities	EUR	79,109.76
ALPHABET INC-CL.A	Equities	Developed Equities	USD	253,606.73
ALPHABET INC-CL.A	Fixed Income	Developed Corporate Investment Grade	CHF	58,444.11
<b>Total</b>				<b>87,148,400.50</b>

Similar to tables

Listed/grouped by rows only

Column headings separate content

Multiple row headings

Matrix

Asset Class L1	CHF	EUR	GBP	USD	Total
Cash	60,643.20	90,071.78	224,572.67	178,161.37	<b>553,449.01</b>
Equities	4,619,397.02	5,255,147.15	6,074,356.50	16,822,088.57	<b>32,770,989.24</b>
Fixed Income	328,974.35	4,585,944.61	216,834.98	41,061,012.99	<b>46,192,766.92</b>
Real Estate	242,332.97	294,415.65	18,310.03	7,076,136.67	<b>7,631,195.32</b>
<b>Total</b>	<b>5,251,347.53</b>	<b>10,225,579.18</b>	<b>6,534,074.17</b>	<b>65,137,399.61</b>	<b>87,148,400.50</b>

Asset Class L1	CHF	EUR	GBP	USD
<input type="checkbox"/> Cash	60,643.20	90,071.78	224,572.67	178,161.37
<input type="checkbox"/> Equities	4,619,397.02	5,255,147.15	6,074,356.50	16,822,088.57
Developed Equities	4,499,230.74	5,228,398.13	6,074,356.50	14,798,003.87
Emerging Market All Cap Equities	120,166.28	26,749.02		2,024,084.70
<input type="checkbox"/> Fixed Income	328,974.35	4,585,944.61	216,834.98	41,061,012.99
<input type="checkbox"/> Real Estate	242,332.97	294,415.65	18,310.03	7,076,136.67
<b>Total</b>	<b>5,251,347.53</b>	<b>10,225,579.18</b>	<b>6,534,074.17</b>	<b>65,137,399.61</b>

### Rules to color values based on values

COLOR

ICONS

DATA BARS



Works well with table or matrix



Useful to highlight key values





### Conditional Formatting

Asset Class L1	CHF	EUR	GBP	USD	Total
Cash	60,643.20	90,071.78	224,572.67	178,161.37	553,449.01
Equities	4,619,397.02	5,255,147.15	6,074,356.50	16,822,088.57	32,770,989.24
Fixed Income	328,974.35	4,585,944.61	216,834.98	41,061,012.99	46,192,766.92
Real Estate	242,332.97	294,415.65	18,310.03	7,076,136.67	7,631,195.32
<b>Total</b>	<b>5,251,347.53</b>	<b>10,225,579.18</b>	<b>6,534,074.17</b>	<b>65,137,399.61</b>	<b>87,148,400.50</b>


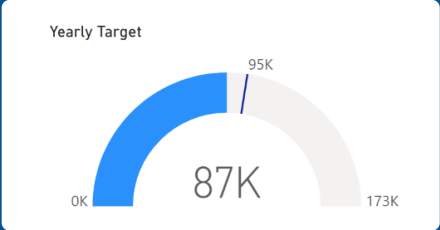

Asset Class L1	CHF	EUR	GBP	USD	Total
Cash	60,643.20	90,071.78	224,572.67	178,161.37	553,449.01
Equities	4,619,397.02	5,255,147.15	6,074,356.50	16,822,088.57	32,770,989.24
Fixed Income	328,974.35	4,585,944.61	216,834.98	41,061,012.99	46,192,766.92
Real Estate	242,332.97	294,415.65	18,310.03	7,076,136.67	7,631,195.32
<b>Total</b>	<b>5,251,347.53</b>	<b>10,225,579.18</b>	<b>6,534,074.17</b>	<b>65,137,399.61</b>	<b>87,148,400.50</b>


Asset Class L1	CHF	EUR	GBP	USD	Total
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Equities	4,619,397.02	5,255,147.15	6,074,356.50	16,822,088.57	32,770,989.24
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Real Estate	242,332.97	294,415.65	18,310.03	7,076,136.67	7,631,195.32
<b>Total</b>	<b>5,251,347.53</b>	<b>10,225,579.18</b>	<b>6,534,074.17</b>	<b>65,137,399.61</b>	<b>87,148,400.50</b>

### Gauge and KPI Visuals

Pie Chart	Bar/Column Chart	Target/Goal Setting
		
Ideal for showing <b>composition</b>	Ideal for showing <b>comparison</b>	Where we are against a <b>set goal or target</b>
		


## Gauge Visuals


→

→


Targets	Single Value	Manual Entry
Set goals or targets e.g. transactions/sales	Where single value is against set target	Driven by value of another field/formula
		

## KPI Visuals

TARGET MET




KPI Quarterly Sales

21342 ✓

Goal: 20000 (+6.71%)

BELOW TARGET



**Total vs Target**


Display a total value against a target or goal

**Above or Below**


Show % above or below the target

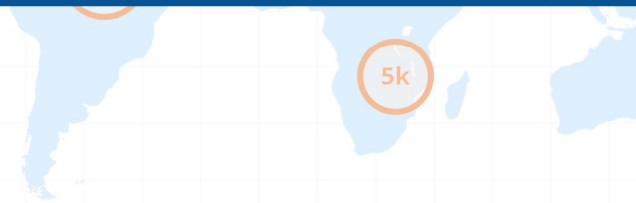
**Fields or Formulas**


Field containing the target values for each time period or a formula which calculates the target



## Maps







# Map Visuals

Country

State

Post Code

Zip Code

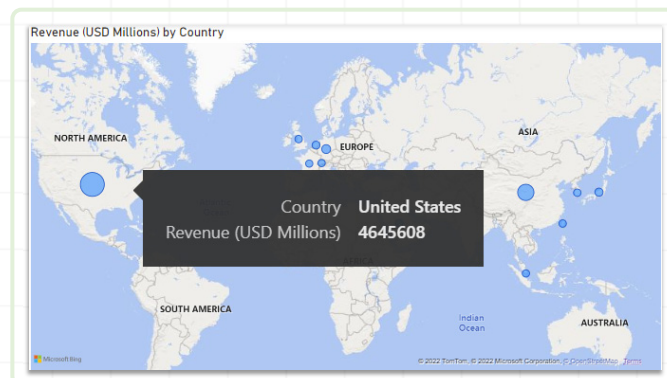
Longitude/Latitude

Industry	Revenue (USD Millions)	Profit (USD Millions)	Employees	Country
Retail	559151	13600	2300000	United States
Electricity	386618	5580	896360	China
Retail, Information Technology	386064	21331	1298000	United States
Oil and gas	283958	4575	1242245	China
Oil and gas	283728	6205	553833	China
Electronics	274515	57411	147000	United States
Healthcare	268706	7179	256500	United States
Healthcare	257141	15403	330000	United States
Automotive	256722	21180	366283	Japan
Automotive	253965	10104	662575	Germany

# Plotting Values on a Map

Dot or Bubble for each location

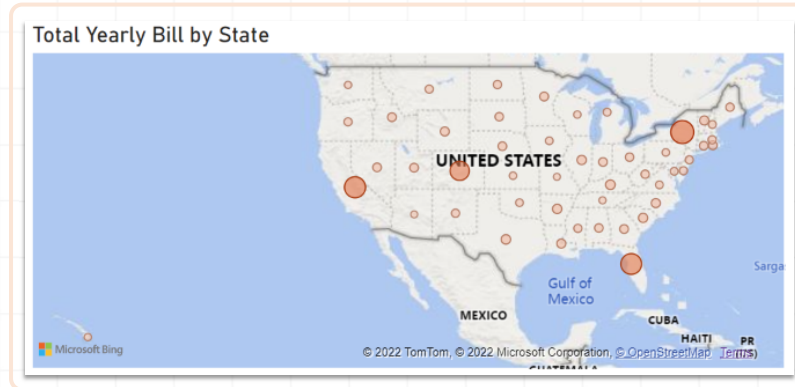
Numerical field value determines size



# Mapping a Region

**Automatically** zoom to region

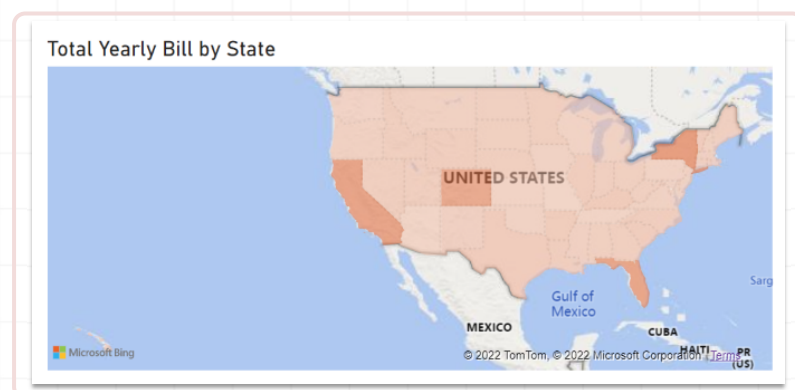
**Manually** zoom on regions also

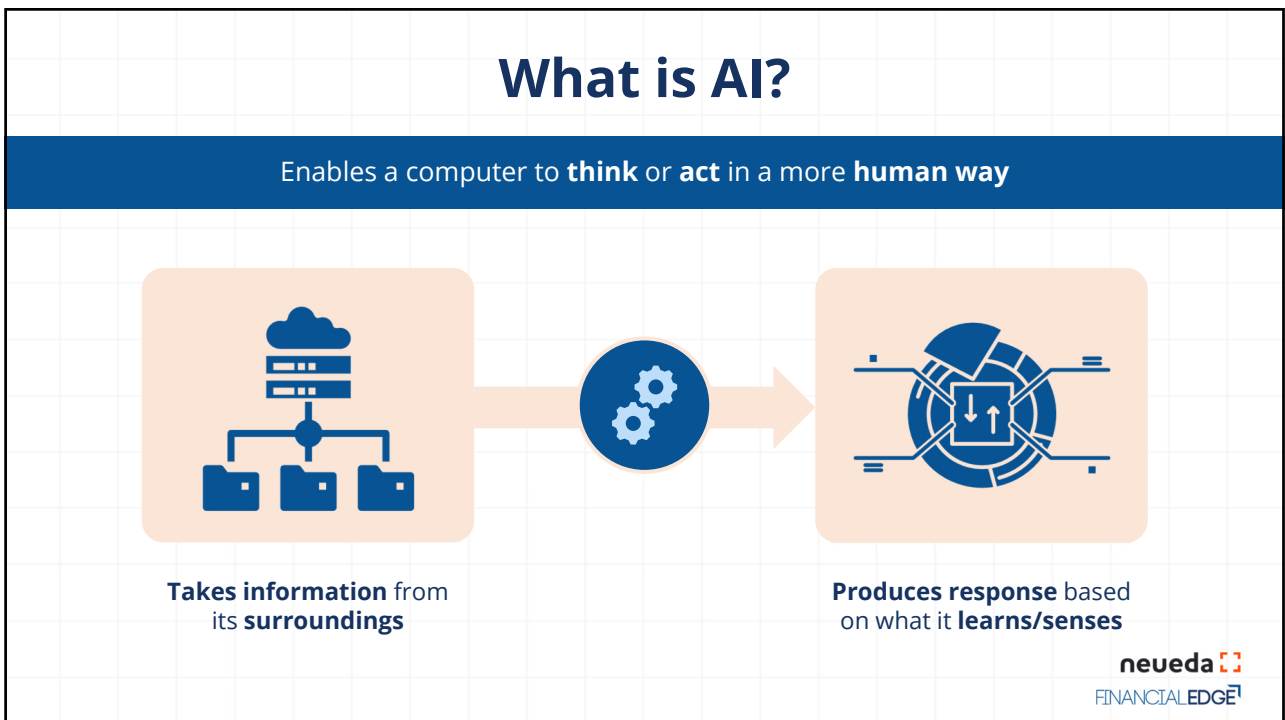
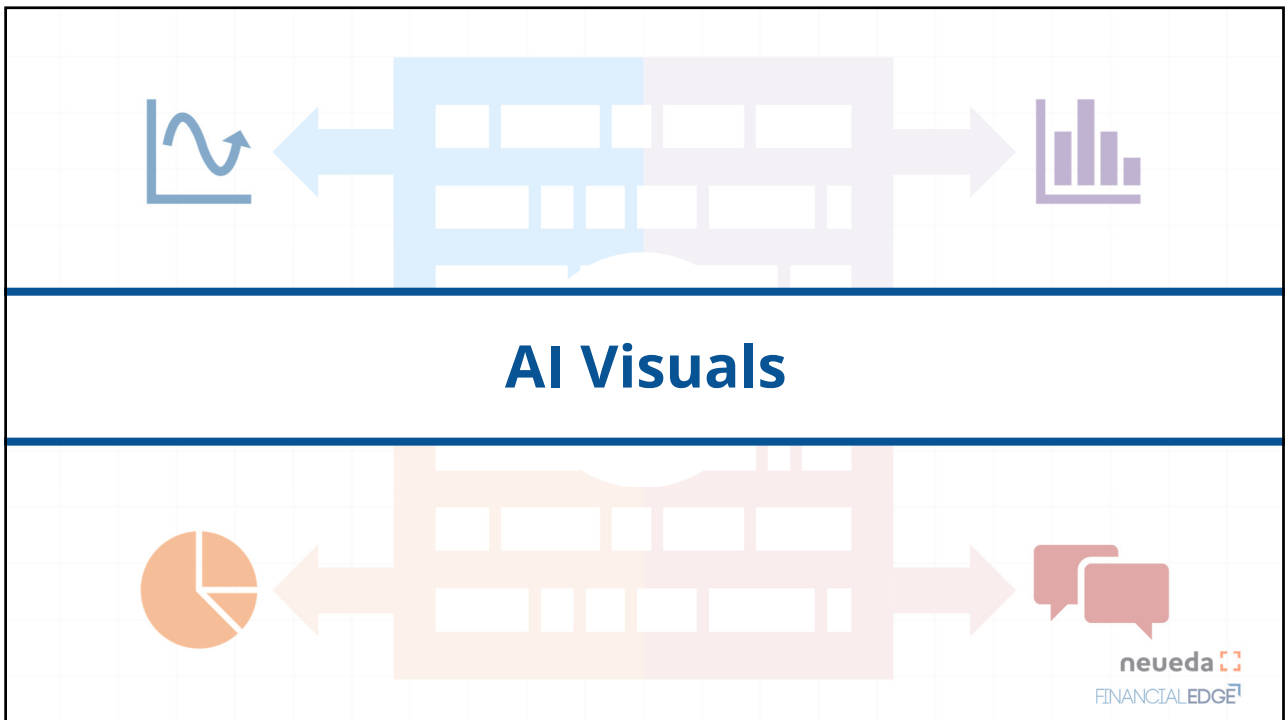


# Filled Maps

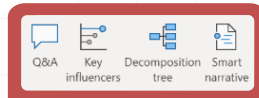
**Shades of colour**

**Heat Maps** – Shade intensifies as value increases

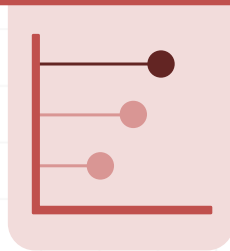




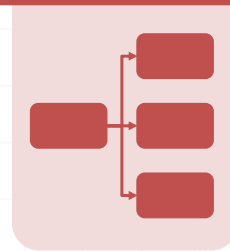
## AI Visuals



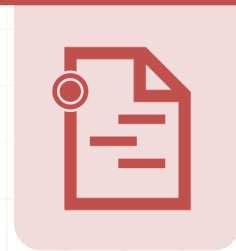
Q&A



Key Influencers

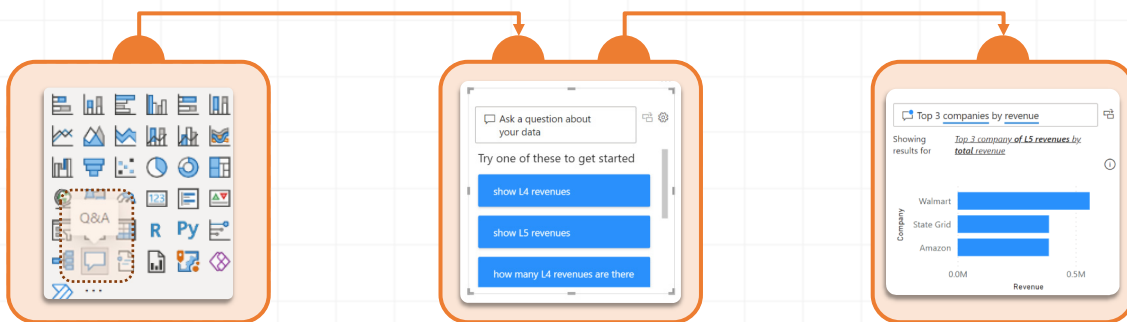


Decomposition Tree



Smart Narrative

## Q&A Visuals



STEP 1

Select the Q&A option

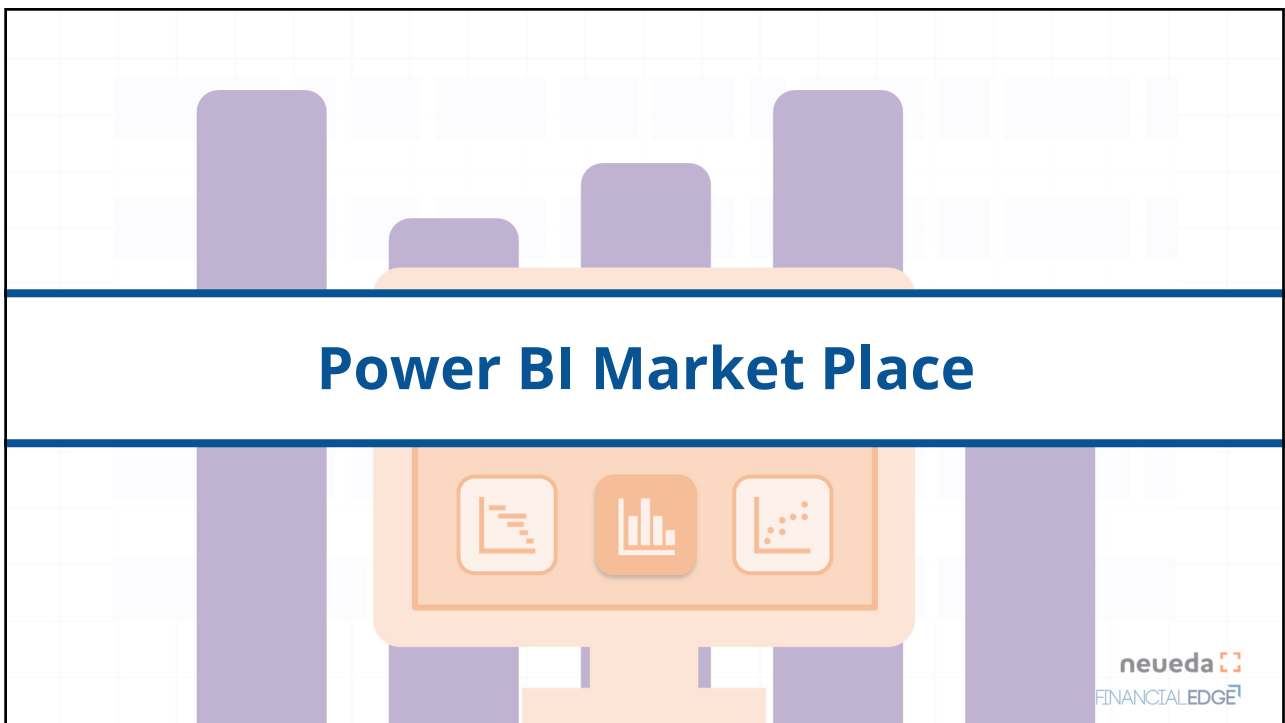
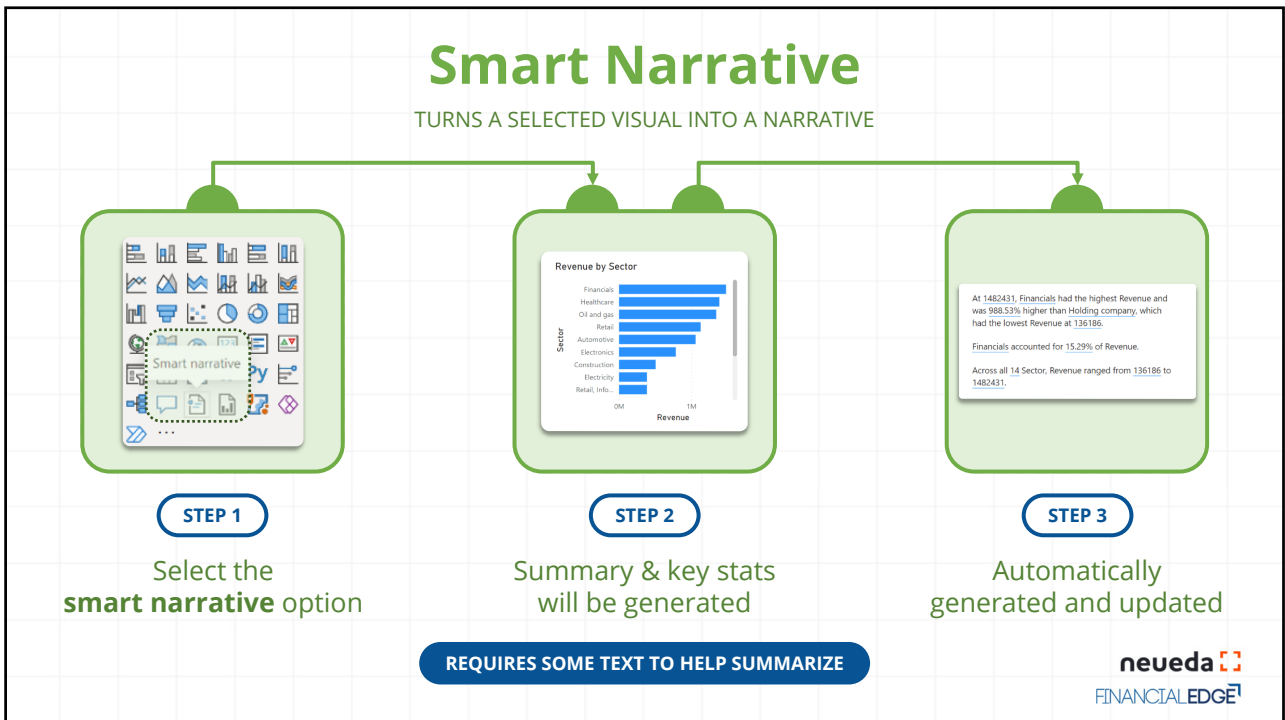
STEP 2

Double click on canvas and enter question

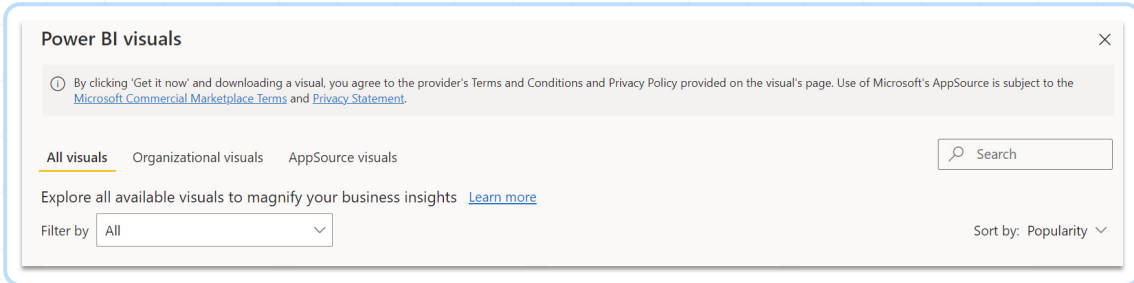
STEP 3

Pin visuals to the canvas

INCLUDE FIELD NAMES



# Power BI Market Place

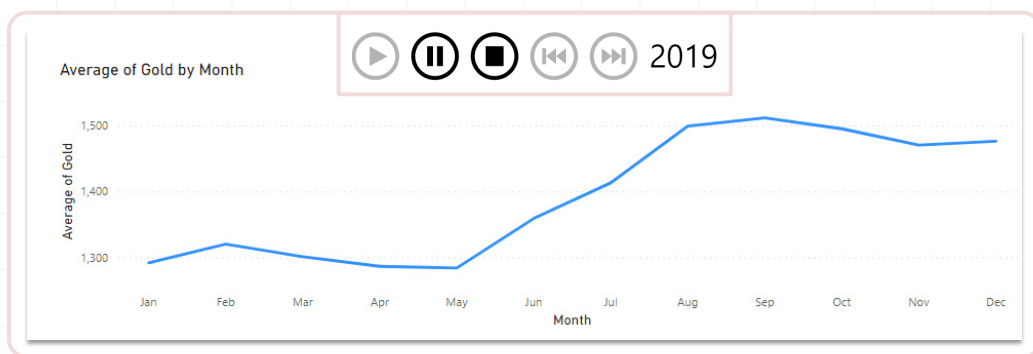


**Search for other chart types**

**Select and add it to your report**

**Histograms - Word and Bullet Charts - Play Axis**

# Play Axis



**Time series analysis**

**Animated & interactive**

**Filters all visuals on page**

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