



Management Development Program

FINANCIAL MODELLING USING EXCEL, POWER BI & TABLEAU

In today's data-driven financial environment, the ability to transform information into meaningful, actionable decisions is an essential skill. This 2-day hands-on workshop is designed to build practical expertise in financial analytics using Microsoft Excel, Power BI, and Tableau, three widely adopted industry tools.

The program follows a structured, application-oriented approach, using real-world datasets and guided exercises to develop strong capabilities in financial modelling, investment appraisal, portfolio construction, risk analysis, and data visualisation for decision-making.

Day 1 focuses on core financial modelling in Excel, including financial functions, investment evaluation techniques, portfolio analysis, and Monte Carlo simulation for options pricing. Day 2 extends these concepts into business intelligence and visual storytelling through Power BI dashboard development and Tableau-based financial visualisation

OBJECTIVES OF THE PROGRAM :

- Apply core Excel financial functions to solve real-world financial problems and build structured models such as break-even analysis and investment appraisal models.
- Develop advanced Excel-based financial decision tools, construct multi-asset portfolio models to estimate return, risk, and perform Monte Carlo simulation and interpret outcome distributions.
- Import, clean, and transform financial datasets in Power BI, and develop interactive financial dashboards.
- Design effective data visualizations and storytelling dashboards in Tableau to communicate financial insights clearly and support decision-making.

WHO CAN ATTEND :

- Early-career Finance Professionals
- Business Analysts & Executives
- Researchers & Faculty Members
- Entrepreneurs & SME Owners

Resource Persons : Dr. D Susana, Assistant Professor, PSGIM

Mr G Kanagasabapathy, Assistant Professor, PSGIM

DATE: 05-06 MAR 2027
TIME: 9 AM - 5 PM
VENUE: PSGIM

PROGRAM FEE: INR 4130 /-
(4000+ GST @ 18%) Per Participant



Location QR

For Registration and further details, contact:
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