

POWER BI FOR BANKING ANALYTICS AND DASHBOARDS



AUGUST 31, 2026



NIBAF, PAKISTAN (KARACHI)



9 AM - 5 PM

FEE: PKR 18,000 PLUS TAX

COURSE CONTENTS

Module 1: Introduction to Power BI for Banking

- Introduction to Business Intelligence
- Overview of Power BI
- Role of data analytics in banking
- Power BI Desktop interface
- Power BI workflow

Module 2: Understanding Banking Data

- Types of banking data
- Customer data
- Account data
- Transaction data
- Branch performance data
- Deposit and financing data
- Loan and recovery data
- Risk and compliance data

Module 3: Connecting Banking Data to Power BI

- Connecting Power BI to Excel
- Connecting Power BI to CSV files
- Connecting Power BI to databases
- Import mode and DirectQuery
- Selecting tables and worksheets
- Reviewing source data
- Managing data-source settings
- Refreshing banking datasets

Module 4: Data Cleaning with Power Query

- Introduction to Power Query
- Removing duplicate records
- Handling missing values
- Correcting data types
- Cleaning customer and account information

- Standardizing branch and product names
- Splitting and merging columns
- Replacing incorrect values
- Creating conditional columns
- Appending transaction records
- Merging master and transaction data

Module 5: Banking Data Modeling

- Understanding data models
- Fact and dimension tables
- Star-schema design
- Creating a transaction fact table
- Creating customer, branch, product, and date dimensions
- Creating table relationships
- One-to-many relationships
- Managing relationship direction
- Creating a date table

Module 6: DAX Foundations for Banking Analytics

- Introduction to DAX
- Calculated columns and measures
- SUM, COUNT, DISTINCTCOUNT, and AVERAGE
- CALCULATE and FILTER
- IF
- DIVIDE
- Month-to-date calculations
- Quarter-to-date calculations
- Year-to-date calculations
- Previous-period comparisons
- Growth and variance calculations

Module 7: Banking Dashboard Design

- Principles of effective dashboard design
- Selecting appropriate

visualizations

- KPI cards
- Bar and column charts
- Line and area charts
- Pie and donut charts
- Matrix and table visuals
- Maps
- Conditional formatting
- Applying professional banking themes

Module 8: Interactive Banking Reports

- Creating slicers and filters
- Date, branch, region, product, and customer filters
- Drill-down and drill-up
- Drill-through reports
- Report-page tooltips
- Bookmarks
- Buttons and page navigation
- Creating management-friendly interactive reports

FACILITATOR

MR. IRFAN BAKALY, who got Pakistan's first Microsoft Most Valuable Professional (MVP) award in Excel category, is also having 20+ years of experience in technology training field and served many institutions & organizations of repute. He is also a YouTuber with an active tutorial channel by the name of "Irfan Wazir Ali" which has more than 525+ videos.

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