

EXCELLING IN FUNDAMENTAL / TECHNICAL ANALYSIS

FUNDAMENTAL / TECHNICAL ANALYSIS IN MS EXCEL AND VBA FOR MS EXCEL

Being an analyst, analysis and validation of data is an integral part of the professional role. Those who want to excel in the analysis role, whether existing or prospective including students of accounting / finance need technical skills as well.

Right from the moment of downloading the data from source websites such as BSE, tons of lines of data need to be cleaned, arranged, collated, aggregated and disaggregated for analysis and in order to derive insights for making informed decisions / guidance.

Taking the help of just plain MS Excel as a manipulation and analytical tool, traversing through large volumes of data and getting useful insights is quite inefficient, ineffective and becomes incomplete from functional analysts' perspective who do on their own or represent MSME analyst firms. Even when we obtain insights based on outsourced analytical function or when our organization has large technical team providing analytical data, we perform independent validations.

Here comes Advanced MS Excel and VBA (or) tools such as 'R' Programming to provide support and help to excel from an individual's perspective. While both are desirable, the former becomes handier and is every one's tool.

HOW WE HELP?

We have designed training programs and design customized programs to meet the 'differing' requirements of analysts / prospective / and potential analysts both in MS Excel and VBA and in 'R'.

Application of Excel and VBA right from 'after the download / collection of data until derivation of insightful cues', includes:

<ul style="list-style-type: none">• Cleaning	<ul style="list-style-type: none">• Disaggregation	<ul style="list-style-type: none">• Controls and Validation
<ul style="list-style-type: none">• Filtering	<ul style="list-style-type: none">• Computation and calculation of Statistical Measures	<ul style="list-style-type: none">• Modelling
<ul style="list-style-type: none">• Collation	<ul style="list-style-type: none">• Historical and Prospective risk and return Analyses	<ul style="list-style-type: none">• Presentation / Summarization
<ul style="list-style-type: none">• Aggregation	<ul style="list-style-type: none">• Interpretation	<ul style="list-style-type: none">• Dashboards

WHY MS EXCEL AND VBA AND NO OTHER TOOLS?

- Seamless end-to-end complete tool for the tasks and functions of an analyst
- Provides programming capability with only reasonable efforts.
- Analyst attains functional independence.
- Other tools such as Power Query provide solutions in respect of only few aspects of the technical / fundamental analysis.
- Easy access.

WHY NOT 'ONLY' MS EXCEL WITHOUT VBA?

- Many of the tasks and functions which VBA helps you carry out cannot be rendered by plain Excel.
- Saves lot of 'memory' space by **doing away with the need of storing large number of formulas and links**, when you have thousands of lines of data elements.
- Modelling becomes much professional.
- It saves a lot of time by automating the procedures and analyses. For example, Subtotalling data of around 30000 rows and 25 columns takes only 5 minutes with VBA functionality, while it takes hours in simple Excel Data-> Subtotal technique. Similarly preparation of Charts for 100s of companies requires just only minutes.
- Minimizes errors and hence team skills development becomes faster.
- 'Trails' become better and easier.

INTERESTED TO KNOW MORE?

Contact us:

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Our Titles that are getting ready

