

# € TRAINING

Excel and AI Tools for Financial Data  
Analysis





# Excel and AI Tools for Financial Data Analysis

## Introduction:

This training program provides participants with comprehensive training in financial data analysis using Excel and AI tools. By focusing on practical applications and real-world scenarios, it empowers them to make data-driven decisions with confidence and precision.

## Program Objectives:

At the end of this program, participants will be able to:

- Master the basics of Excel and AI tools for financial data analysis.
- Acquire techniques for converting big data into a usable format.
- Develop proficiency in financial analysis using Excel and AI algorithms.
- Apply theoretical principles to interpret financial data accurately.
- Enhance communication skills to convey insights effectively to stakeholders.

## Targeted Audience:

- Finance professionals.
- Data analysts.
- Business analysts.
- Employees interested in utilizing Excel and AI tools for financial data analysis.

## Program Outlines:

### Unit 1:

#### Introduction to Excel and Financial Data Analysis:

- Overview of Excel functions and formulas.
- Basics of financial data analysis.
- Key Excel tools: sorting, filtering, pivot tables, and charts.
- Introduction to data manipulation techniques.

- Importance and challenges of financial data analysis.

## Unit 2:

### Introduction to AI Tools for Financial Analysis:

- Overview of AI in finance.
- Basic machine learning concepts.
- AI applications: regression and classification.
- Data preprocessing with AI: cleaning and normalization.
- Introduction to feature engineering.

## Unit 3:

### Converting and Preparing Financial Data:

- Understanding big data.
- Techniques for data cleaning and preprocessing.
- Data transformation using Excel and AI tools.
- Converting raw data into a usable format.
- Practical exercises on data preparation.

## Unit 4:

### Financial Analysis Techniques:

- Key financial analysis techniques: ratios and trends.
- Applying financial theory to data.
- Forecasting and modeling in Excel.
- Hands-on exercises in financial modeling.
- Sensitivity analysis and interpretation of results.

## Unit 5:

### Advanced Data Visualization and Communication:



- Advanced data visualization techniques.
- Creating interactive dashboards and reports.
- Effective communication of financial insights.
- Best practices for using Excel and AI in decision-making.
- Case studies and real-world applications.