FINANCIAL MODELLING IN EXCEL FOR BANKING

COURSE INFORMATION

Excel plays a crucial role on various levels in any organisation. It is therefore important that staff grasp the principles of functions, applications and modelling in Excel to improve productivity in the workplace. A thorough grasp of the principles of functions, applications and modelling is a key competency needed for effective management of a business. The purpose of this practical and interactive Excel course is to guide you through the essential and more advanced Excel skills needed to perform your analytical function.

This has the potential to upskill individuals into becoming independent Excel users, as the course not only focuses on solving the problems at hand, but also how to solve future problems in their own areas of work. The course also touches on more advanced functionalities, such as macros and various Excel add-ins.

COURSE CONTENT

- Revision of Level 1 Concepts (including absolute references, basic functions, formatting)
- Data visualisation (including charts, combo charts, exporting charts, table tools, sparklines)
- Intermediate functions (including SUMIFS, nested IF, XLOOKUP, text functions, INDEX, MATCH)
- Working with data (including conditional formatting, subtotals, group and outline, transposing)
- Form controls and interactivity tools (including spin buttons, checkboxes, lists, option buttons)
- Summary of keyboard shortcuts and other useful tools (including formula auditing)
- Data validation and data protection (including lists, audit toolbar, locking cells, protecting sheets)
- Cleaning and manipulation of data (including multiple nested formulas, text-to-column and clean-up)
- Basic and intermediate Macros
- Pivot tables (including slicers, pivot charts, basic manipulation of pivot tables)
- Basic and intermediate array calculations
- Add-ins and other tools (including solver, goal seek, scenario manager, sensitivity analysis)

"I have learnt numerous new Excel skills over the duration of the course. In addition, the skills I gained were relevant to my day-to-day activities that I perform in my job!"

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