

FINANCIAL DATA VISUALIZATION WITH POWER BI

March 23rd, 25th, 27th 2026

Turn complex financial data into clear, compelling insights using Power BI.

Learn to build interactive dashboards and reports that drive smarter, faster decision-making.



Overview

This interactive course equips participants with the practical skills and knowledge required to transform financial data into clear, insightful, and visually compelling reports using Power BI. The programme is delivered over three focused half-day sessions, combining guided instruction with hands-on exercises.

Participants will learn how to connect to multiple data sources, clean and model data, and design interactive dashboards that communicate trends, performance, and risk effectively.

Through hands-on exercises and real-world financial examples, the course emphasizes data storytelling and best practices that support confident, data-driven decision-making.

Key Learning Outcomes

The course, supported by case studies and exercises, will cover, among others, the following topics.

- Understand core Power BI concepts and how they apply to financial data analysis.
- Connect to, combine, and manage data from multiple internal and external sources.
- Clean, transform, and model financial data using Power Query
- Ensure data accuracy, consistency, and integrity in reports.
- Select and apply appropriate visualizations for financial reporting and analysis.
- Analyze financial trends, variances, and time-series effectively.
- Design interactive dashboards using filters, slicers, drill-throughs, and bookmarks.
- Apply data storytelling principles to communicate insights clearly and persuasively.
- Customize and format reports for clarity, consistency, and executive impact.
- Enable self-service analysis through interactive and dynamic reporting.

- Automate recurring financial reports to improve efficiency and productivity.
- Publish, share, and manage Power BI reports securely while following governance best practices.
- Translate complex financial results into executive-ready visuals that support better decision-making.

Who should attend?

This workshop should be of particular interest to:

- Credit Analysts and Risk Officers
- Relationship Managers and Loan Officers
- Corporate and Investment Bankers
- Financial Analysts and Treasurers
- Regulators and Supervisory Staff
- Professionals in Credit Unions, Development Banks, and Insurance Companies
- Business Intelligence and Reporting Professionals
- Data Analysts supporting Finance, Risk, or Compliance functions.
- Finance Managers and Financial Controllers
- Credit Risk, Market Risk, and Portfolio Risk Professionals
- Professionals responsible for financial reporting, dashboards, and management information (MI)
- Decision-makers seeking to enhance data-driven insights and reporting capabilities.

Program Curriculum

Module 1: Introduction to Power BI for Financial Professionals

- Overview of Power BI and its role in financial analysis and reporting
- Power BI ecosystem: Desktop, Service, and publishing options
- Understanding financial use cases for dashboards and reports

Module 2: Connecting to Financial Data Sources

- Connecting to Excel, CSV, databases, and other common financial data sources
- Understanding data types and properties in Power BI
- Combining data from multiple sources
- Creating and managing data relationships

Module 3: Data Cleaning, Transformation, and Modelling

- Using Power Query to clean and prepare financial data.
- Filtering, formatting, and handling missing or inconsistent data.
- Creating calculated and conditional columns
- Reshaping data for analysis (unpivoting, splitting, merging)
- Best practices for ensuring data accuracy and integrity.

Module 4: Financial Data Analysis and Visualization

- Selecting the right visuals for financial data
- Analyzing trends, variances, and time-series performance
- Applying conditional formatting for financial insights
- Using slicers and filters to enhance interactivity

Module 5: Building Interactive Dashboards and Reports

- Designing professional, user-friendly dashboards
- Working with report pages and layouts
- Creating interactive elements: drill-throughs, bookmarks, and buttons
- Applying themes and formatting for executive-ready reports

Module 6: Data Storytelling and Insight Communication

- Principles of effective data storytelling
- Translating complex financial results into clear narratives
- Designing reports for different stakeholders (management, regulators, clients)

Module 7: Publishing, Sharing, and Governance

- Publishing reports to the Power BI Service
- Sharing dashboards securely with stakeholders
- Understanding access control, governance, and best practices
- Enabling self-service reporting

Module 8: Practical Application and Hands-On Exercises

- Hands-on exercises using real-world financial datasets.
- Building end-to-end dashboards from raw data to final report
- Instructor feedback and best-practice review

Our Live Online Workshops – How it works.

The structure of our virtual learning programmes is designed to maintain the same levels of engagement and networking as our in-person workshops. The workshop will be facilitated by highly knowledgeable and experienced instructors who have successfully delivered their respective programmes both online and in-person over several years.

Registered participants will join the workshops via standard virtual conferencing software (Zoom), and the workshop material will be presented live by the facilitator.

Participants will be able to ask questions in real time, engage in practical group case studies, and benefit from a limited class size that supports an interactive, discussion-based training style, comparable to in-person workshops.

The one-and-a-half-day courses will be delivered over three half-day sessions to ensure a high level of engagement throughout, while also allowing participants the flexibility to manage other responsibilities during the workday.

About CariCRIS

CariCRIS is the Caribbean's premier regional credit rating agency. Our mission is to contribute to the development of a vibrant, integrated Caribbean capital market by setting the highest standards of credible independent analysis and opinion to enable informed financial decisions.

Our technical consultant, CRISIL Limited, is the world's fourth largest rating agency and a subsidiary of Standard & Poor's (S&P), the world's leading index provider, and the foremost source of independent credit ratings across the globe. CariCRIS has successfully delivered first-class training to over 1,000 credit and risk professionals across the Caribbean over the past 20 years.



Fitch Learning, part of Fitch Group, is a trusted global provider of financial education. Built on deep expertise in credit and strengthened by broad experience across financial services, we deliver impactful learning solutions through client-focused programs, courses, and professional qualifications.

Harnessing digital innovation and AI-driven learning tools, we empower organizations worldwide to build future-ready teams. Fitch Learning owns the CQF Institute and the Global Institute of Credit Professionals, dedicated to supporting financial professionals throughout their career journeys.



Registration

Date: March 23rd, 25th, 27th, 2026
Time: 9:00 a.m. – 1:00 p.m.
Format: Live Online Training
Registration Deadline: March 19th, 2026,
Cost: 1,000.00USD
5% discount for groups of 2
10% discount for groups of 3 and above

For further details email us at: training@caricris.com

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