

50% Faster Reporting and 40% Better Visibility: **Power BI in Action**

A UK-based trading firm partnered with **Cedars BC** to understand performance and forecast more accurately.



Consolidate scattered financial data, gain clear insights, more informed investment and strategic decision.

Before the change, management lacked timely visibility for analysis, forecasting, and planning.

Now, all financial data are centralized, reporting is automated, and real-time insights are provided.



Industry
Trading and Finance



Department
Finance



Engagement Model
Project Management

Know the Context

A UK-based trading and finance company managing multiple investment portfolios needed a clearer, unified view of its financial performance.

Data was scattered across spreadsheets with no system to analyze YTD earnings, EPS, percentage changes, or growth trends—requiring a solution that could consolidate data, support forecasting, and deliver actionable insights for faster decisions.



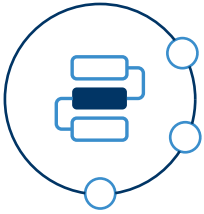
Performance Was Limited

Although financial information was available, manual tracking and reporting results were **fragmented, inconsistent, and time-consuming** to process.

- Financial data scattered across multiple spreadsheets
- No automated way to track YTD performance or EPS changes
- Limited forecasting capability for projecting future earnings
- Inconsistent reporting and delayed management insights

Our Solution

Cedars BC was engaged to design and implement an interactive **Power BI dashboard**.



- ✓ Integrate all financial data into a single reporting system.
- ✓ Providing real-time insights and forecasting capabilities.



- ✓ Cedars BC empowered the management with clarity and speed in financial evaluation.

Key solution elements:

Unified Reporting System
Consolidated all financial data for centralized analysis

Long-Term Growth Metrics
Calculated earnings yield CAGR to measure compound growth

Automated Updates
dashboards were always up-to-date

Dynamic Visuals
Displayed YTD earnings, EPS trends, forecasted earnings

Flexible Filtering
Ticker and time period analysis

Projects Were Transformed

The Power BI solution transformed financial reporting and decision-making to **proactive, insight-driven decision-making**.

With a single source of truth, management could evaluate performance quickly, forecast profitability, and act confidently.

Enabled faster and more accurate investment and trading decisions

Enhanced management's strategic planning and profitability forecasting

50%

reduction in time spent on manual reporting

40%

improvement in visibility into performance

30%

faster performance evaluation and forecasting

100%

of financial data in one Power BI solution

The Insight

By unifying fragmented financial data into a single Power BI dashboard, **Cedars BC** helped the company gain clearer visibility, faster analysis, and greater confidence in its investment decisions.

The Lesson



Data only creates value when it drives action. Centralized, and reliable reporting enables smarter planning, fewer errors, and timely, informed decisions to ensure the success of the company.