

Twitter Thread by [Andrew talks Money, Investing, Stocks & Crypto](#)



Andrew talks Money, Investing, Stocks & Crypto

@FluentInFinance



I've used Microsoft Excel for 20 years, and these 20 tips & functions will make you an expert and increase your productivity 100X■

Don't ever use Excel again without knowing these 20 tips & functions:

Here are 20 MUST KNOW Microsoft Excel tips & functions (with pictures & examples of each below):

- (1) Wildcards
- (2) Duplicate
- (3) Remove Duplicates
- (4) Transpose
- (5) Filter
- (6) Conditional Formatting
- (7) Sparklines
- (8) Pivot Tables
- (9) Auto-fill
- (10) TRIM

11-20:

- (11) XLOOKUP
- (12) IF
- (13) SUMIF
- (14) SUMIFS
- (15) COUNTIF
- (16) COUNTIFS
- (17) UPPER, LOWER, PROPER
- (18) CONVERT
- (19) Stock Market data
- (20) Geography / Maps

Let's discuss each in detail (with pictures & examples):

(1) Wildcards

A wildcard is a special character that allow you to perform partial matches on text in your Excel formulas.

Excel has three wildcards: an asterisk "*", question mark "?", and "~"

Wildcard (?, *, ~) Complete tutorial

Formulas, Filter and Find & Replace

	A	B	C
	Wildcard	How to work	Examples
2	?	Single text character	"A", "B", "a", "b", etc.
3	??	Double text Character	"PK", "xy", "im" etc.
4	?*	One or greater than one character	"a", "pk", "Raj", "XYZ", etc.
5	??*	Two or greater than two character	"ab", "pk", "Jack", "Sunday", etc.
5	(???)	3 Characters in the brackets	"(Sun)", "(Mon)", "(Xyz)" etc.
7	*	For any text character	"pk", "PK", "abc123", etc.
8	*tion	Ends in "tion"	"Condition", "Objection", "Tradition" etc.
9	pk*	Starts with "pk"	"PK's Chart", "pk's dashboards", "PK's youtube Channel" etc.
0	*PK*	Contains "PK"	"PK's Chart", "Who is PK?", "Me and PK are working together" etc.
1	*~?	Ends in question mark	"How are you?" etc.
2	~**	Starts with "***"	"** T&C applied" etc.

(2) Duplicate

Duplicate the data from the cell above.

Ctrl + D fills and overwrites a cell with the contents of the cell above it

CTRL D in Excel

Excel interface showing a formula bar with `=SUM(B2:F2)` and a spreadsheet with columns A through G. The 'Total' column (G) contains the sum of scores for each student. A red box highlights the 'Total' column, and a callout bubble indicates that **Ctrl+D** copies and pastes downward in one quick shortcut. A large black box with **CTRL + D** is shown with a dashed arrow pointing to the 'Total' column.

	A	B	C	D	E	F	G
1	Name	Physics	Chemistry	Zoology	Maths	Computers	Total
2	Robin	100	90	80	70	60	400
3	Alex	100	90	80	70	60	400
4	Adam	100	90	80	70	60	400
5	Lee	100	90	80	70	60	400
6			90	80	70	60	400

(3) Remove Duplicates

Remove duplicates in a set of data in Excel

Alt+A+M

02. press Alt+H+F+S

01. Select the range

SI No	Sales Manager	Project Completion Days
1	Jackson	Between 181-270 days
2	Mathew	Between 91-180 days
3	Everton	Between 271-365 days
4	Thomas	Less than 90 days
5	Samuel	Between 91-180 days
6	Robert	Less than 90 days
7	Olivier	Between 91-180 days
8	Lucas	Less than 90 days
9	Mario	Between 181-270 days
10	Shreyasi	Less than 90 days
11	Siddhart	Between 91-180 days
12	Jonathon	Between 181-270 days
13	Paolo	Between 271-365 days
14	Takumi	Between 271-365 days

(4) Transpose

This will transform items in rows, to instead be shown in columns, or vice versa.

To transpose a column to a row:

1. Select the data in the column,

2. Select the cell you want the row to start,
3. Right click, choose paste special, select transpose

B	C	D	E	F	G	H	I	J	K	L
---	---	---	---	---	---	---	---	---	---	---

Excel TRANSPOSE Function

No.	1	2	4	5	6	7	8
Name	AA	BB	CC	DD	EE	FF	GG



No.	Name
1	AA
2	BB
4	CC
5	DD
6	EE
7	FF
8	GG

(5) Filter

The FILTER function allows you to filter data based on a query.

For example, you can filter a column to show a specific product or date.

You can also sort in ascending or descending order.

The shortcut for this function is CTRL + SHFT + L

Data Filter in Excel

The screenshot illustrates the process of applying a filter in Excel. The 'Data' tab is selected on the ribbon, and the 'Filter' button is highlighted. Below the ribbon, a table with columns A (Date) and B (Product) is shown. A red arrow points from the 'Product' column header to the 'Custom AutoFilter' dialog box. The dialog box shows 'Show rows where: Date equals 1/15/2017'.

	A	B
1	Date	Product
2	01/22/17	HUAWEI
3	01/12/17	XIAOMI
4	01/20/17	HUAWEI
5	01/08/17	XIAOMI

Custom AutoFilter

Show rows where:

Date

equals 1/15/2017

And Or

Use ? to represent any single character

(6) Conditional Formatting

Conditional formatting helps to visualize data, and can show patterns and trends in your data

Go to: [Home](#) -> [Conditional Formatting](#) -> [Highlighting Cell Rules](#)

B	C	D	E	F	G
---	---	---	---	---	---

Conditional formatting highlight target percentage

Score
60%
70%
78%
80%
85%
89%
95%
98%

Key:

Score	Rating	Formula
90%	Good	=B5>=90%
80%	OK	=B5>=80%
<80%	Poor	=B5<80%

(7) Sparklines

Sparklines allow you to insert mini graphs inside a cell provides a visual representation of data.

Use sparklines to show trends or patterns in data.

On the 'Insert tab', click 'Sparklines'

Figure 1.10: Inserting a Sparkline

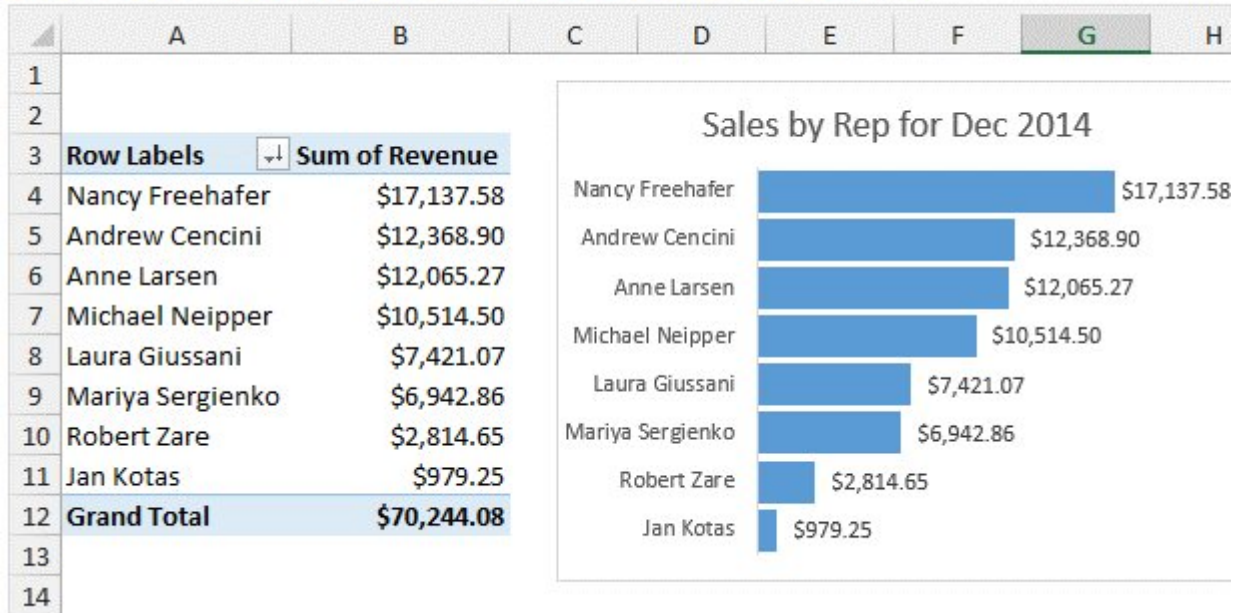
The screenshot shows the Excel ribbon with the 'Sparkline' tab selected. The 'Type' section has 'Line' selected. The 'Show' section has 'High Point', 'Low Point', and 'Negative Points' checked. The 'Style' section shows a preview of a blue line with markers. A red arrow points to the 'Sparkline' tab.

(8) Pivot Tables

A powerful tool to calculate, summarize & analyze data, which allows you to compare or find patterns & trends in data.

To access this function, go to "Insert" in the Menu bar, and then select "Pivot Table"

Learn How To Create this Pivot Table and Pivot Chart

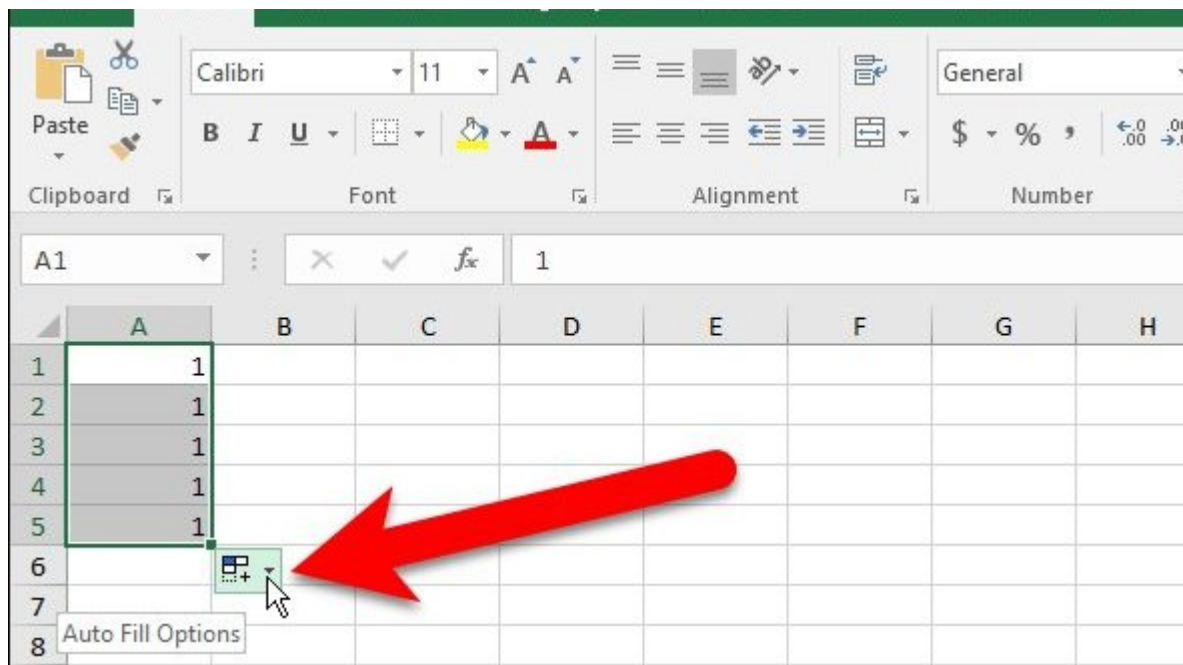


(9) Auto-fill

With large data sets, instead of typing a formula multiple times, use auto-fill.

There are 3 ways to do this:

- (1) Double click mouse on the lower right corner of a 1st cell, or
- (2) Highlight a Section and type Ctrl + D, or
- (3) Drag the cell down the rows



(10) TRIM

TRIM helps to remove the extra spaces in data.

TRIM can be useful in removing irregular spacing from imported data

=TRIM()



Name	City	ZIP Code	Trim Spaces
Adam Smith	Fl orida	1001	1001
Jim Carry	Californ ia	2005	2005
Rachel Ross	Miami	3100	3100
Victor Rosario	Ch ica go	1201	1201
Kristin Moran	Wash ington	4321	4321
Jonas Moran	California	4001	4001
Monica Rosario	Miami	5001	5001

(11) XLOOKUP

XLookup is an upgrade compared to VLOOKUP or Index & Match. Use the XLOOKUP function to find things in a table or range by row.

Formula: =XLOOKUP (lookup value, lookup array, return array)

F2 \times \checkmark f_x **=XLOOKUP(F1, A2:A6, C2:C6)**

A	B	C	D	E	F	G	H
Ocean	Average Depth (m)	Area (km²)		Ocean	Indian	<i>Lookup_value</i>	
Pacific	3,970	168,723,000		Area	70,560,000	<i>Result</i>	
Atlantic	3,646	85,133,000					
Indian	3,741	70,560,000					
Southern	3,270	21,960,000					
Arctic	1,205	15,558,000					

Lookup_array *Return_array*

=XLOOKUP(F1, A2:A6, C2:C6)

Search for *this value*, in *this range*, return a match from *this range*

(12) IF

The IF function makes logical comparisons & tells you when certain conditions are met.

For example, a logical comparison would be to return the word "Pass" if a score is >70, and if not, it will say "Fail"

An example of this formula would be =IF(C5>70,"Pass","Fail")

D5 \times \checkmark f_x **=IF(C5>=70,"Pass","Fail")**

	A	B	C	D	E	F	G	H	I
1									
2									
3									
4									
5									
6									
7									
8									
9									
10									
11									
12									
13									
14									

IF function

Name	Score	Result
Anderson	92	Pass
Bautista	85	Pass
Block	65	Fail
Burrows	79	Pass
Chandler	69	Fail
Colby	95	Pass
Crosby	90	Pass
Dove	70	Pass
Frantz	96	Pass
Gonzalez	93	Pass

(13) SUMIF

Use this to sum the values in a range, when they meet a certain criteria.

For example, use this if you want to figure out the amount of sales in a given region or by person.

fx =SUMIF(B5:B15,"jim",D5:D15)

B	C	D	E	F	G	H	I	J
---	---	---	---	---	---	---	---	---

SUMIF function

Name	State	Sales
Jim	MN	\$100
Sarah	CA	\$125
Jane	GA	\$200
Steve	CA	\$50
Kelly	WA	\$125
Walter	OR	\$75
Brian	OR	\$100
Jamie	CA	\$200
Ayako	NV	\$250
lim	IA	\$100

Criteria	Result
Name = Jim	\$200
State = CA	\$375
Sales > \$100	\$1,050

=SUMIF(B5:B15,"jim",D5:D15)

=SUMIF(C5:C15,"ca",D5:D15)

=SUMIF(D5:D15,">100")

(14) SUMIFS

SUMIFS sum the values in a range that meet multiple criteria.

For example, use it if you want the sum of two criteria, for example, Apples from Pete.

The formula is SUMIFS (sum_range, criteria_range1, criteria1, [criteria_range2, criteria2], ...)

F3			=SUMIFS(C2:C9, A2:A9, "apples", B2:B9, "Pete")				
	A	B	C	D	E	F	G
1	Product	Supplier	Qty.		Product:	Apples	
2	Cherries	John	200		Supplier:	Pete	
3	Bananas	Mike	350		Qty.:	290	
4	Apples	Pete	180				
5	Oranges	Mike	400				
6	Bananas	John	250				
7	Apples	Mike	120				
8	Cherries	John	330				
9	Apples	Pete	110				

Apples supplied by Pete:
180+110=290

criteria_range1 criteria_range2 sum_range

(15) COUNTIF

Use COUNTIF to count the number of cells that satisfy a query.

For example, you can count the number of times a particular word has been listed in a row or column.

F2	=COUNTIF(A2:A10, F1) + COUNTIF(A2:A10, G1)					
	A	B	C	D	E	F
1	Item	Amount	Status		Items	Apples
2	Apples	\$250	Delivered		Count	5
3	Bananas	\$450	In transit			
4	Oranges	\$250	Cancelled			
5	Apples	\$150	Delivered			
6	Lemons	\$100	Delivered			
7	Apples	\$150	In transit			
8	Oranges	\$100	Delivered			
9	Lemons	\$400	Cancelled			

(16) COUNTIFS

CountIf counts the number of times a criteria is met.

For example, it counts the number of times that both (1) apples and (2) price > \$10, are mentioned.

File Home Insert Page Layout Formulas Data Review View Kuto Kuto Tell me... Sign in Share									
F4	=COUNTIFS(B3:B7,F2,C3:C7,F3)								
	A	B	C	D	E	F	G	H	
1									
2		Fruit	Price		Criteria1	apple			
3		apple	12		Criteria2	>10			
4		peach	19		Count	2			
5		apple	15		Also can use this formula				
6		banana	5		=COUNTIFS(B2:B7,"apple",C3:C7,">10")				
7		apple	9						
8									

(17) UPPER, LOWER, PROPER

=UPPER, Converts text to all uppercase,

=LOWER, Converts text string to lowercase,

=PROPER, Converts text to proper case

B	C	D
UPPER	LOWER	PROPER
JOHN JONES	john jones	John Jones
MARY MOORE	mary moore	Mary Moore
FRED FRANCIS	fred francis	Fred Francis
WILL WALLACE	will wallace	Will Wallace
CRAIG CONNORS	craig connors	Craig Connors
ANDREW ALLEY	andrew alley	Andrew Alley

(18) CONVERT

This converts one measurement to another. There are multiple conversions that you can do.

An example is meters to feet, or Celsius to Fahrenheit.

Formula bar: `=CONVERT(B6, "km", "mi")`

Number	From_Unit	to_Unit	Result	Formula
100	Kilometers	Miles	62.1371192	<code>=CONVERT(B6, "km", "mi")</code>
100	Miles	Kilometers	160.9344	<code>=CONVERT(B7, "mi", "km")</code>
100	seconds	milliseconds	100000	<code>=CONVERT(B8, "sec", "msec")</code>
100	Miles Square	Feet Square	2787840000	<code>=CONVERT(B9, "mi2", "ft2")</code>
100	Gallons	Liters	378.541178	<code>=CONVERT(B10, "gal", "lt")</code>
100	Cubic Foot	Cubic Inch	172800	<code>=CONVERT(B11, "ft^3", "in^3")</code>

Sheet1

(19) Stock Market data

You can get stock data in Excel

Enter a list of stock ticker symbols. then select the cells and go to the Data tab, then click the Stocks button within the Data Types group.

Excel will attempt to match each cell value to a company stock, and fill in data

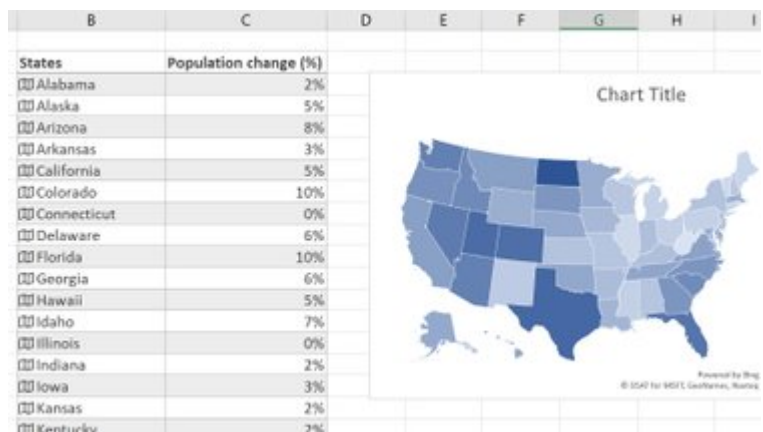
	A	B	C	D	E
1	Company	Microsoft Corp	Barclays PLC	Royal Dutch Shell PLC	Nestle India Ltd
2	Ticker symbol	MSFT	BARC	R6C3	500790
3	Exchange	NASDAQ	London	Xetra	Mumbai
4	Exchange abbreviation	NAS	LON	ETR	BOM
5	Currency	USD	GBX	GBP	INR
6	Previous close	\$ 110.19	162.88	£ 27.40	10,718.95 ₹
7	Open	\$ 110.70	165.04	£ 28.09	10,809.10 ₹
8	Low	\$ 109.36	164.74	£ 28.04	10,648.85 ₹
9	High	\$ 110.97	167.54	£ 28.28	10,821.70 ₹
10	Price	\$ 110.89	166.36	£ 28.23	10,750.05 ₹
11	Change	\$ 0.70	3.48	£ 0.83	31.10 ₹
12	Change (%)	0.6%	2.1%	3.0%	0.3%
13	52 week low	\$ 80.70	160.48	£ 25.40	6,887.75 ₹
14	52 week high	\$ 116.18	220.10	£ 32.66	11,700.00 ₹
15	Volume	\$ 25,519.00	\$ 7,283,697.00	\$ 25,698.00	\$ 1,830.00
16	Volume average	\$ 8,080,573.31	\$ 50,949,999.11	\$ 25,129.18	\$ 8,692.67
17	Shares outstanding	7,724,983,171	17,498,554,039	8,504,814,209	96,868,159
18	Market cap	851,216	2,850,164	233,032	1,038,325

(20) Geography/ Maps

Instead of researching geographical data or maps, use Excel

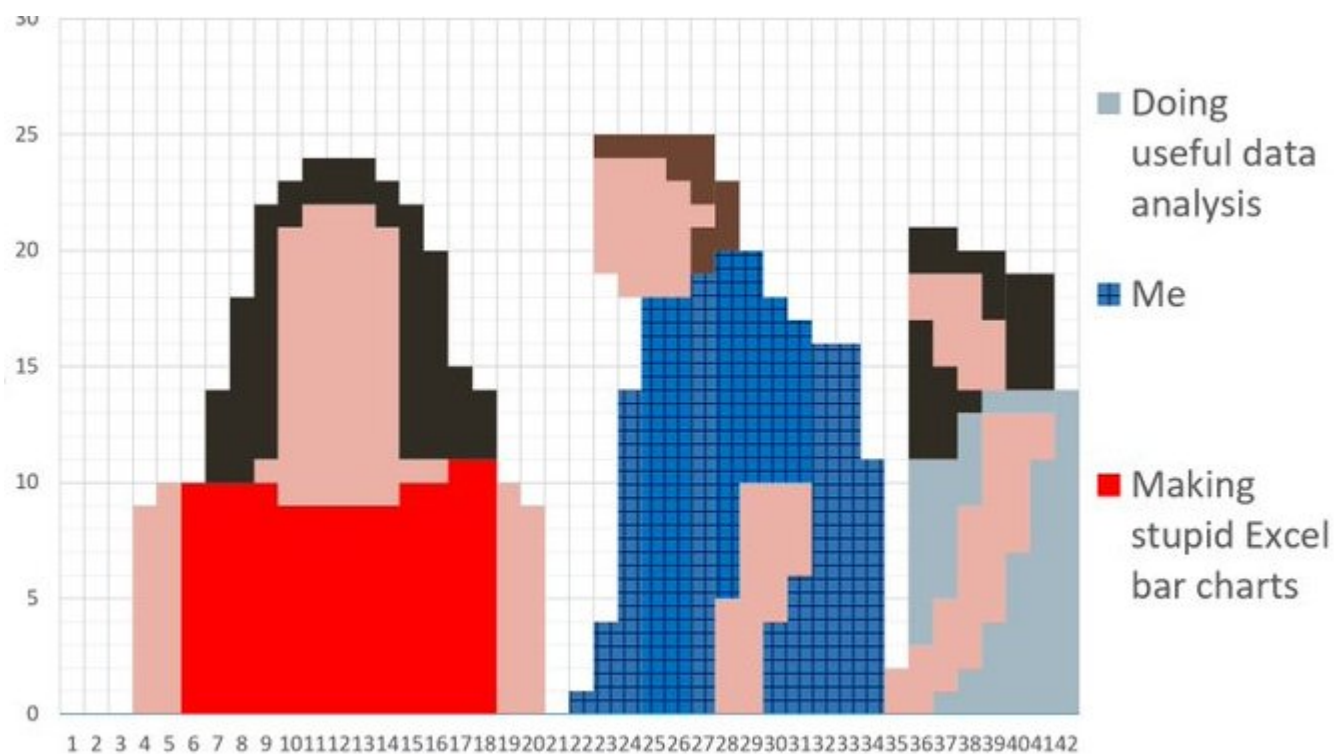
With the Geography data type, you can retrieve data like population, time zone, area leaders, gasoline prices, language, and more

Type the data you need, then go to Data Tab -> Geography



BONUS:

You can use Microsoft Excel to create art



If you found this thread helpful:

- Follow me: [@FluentInFinance](#)
- RT the FIRST tweet
- LIKE the tweets

This account was created to help you learn.