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 "~"

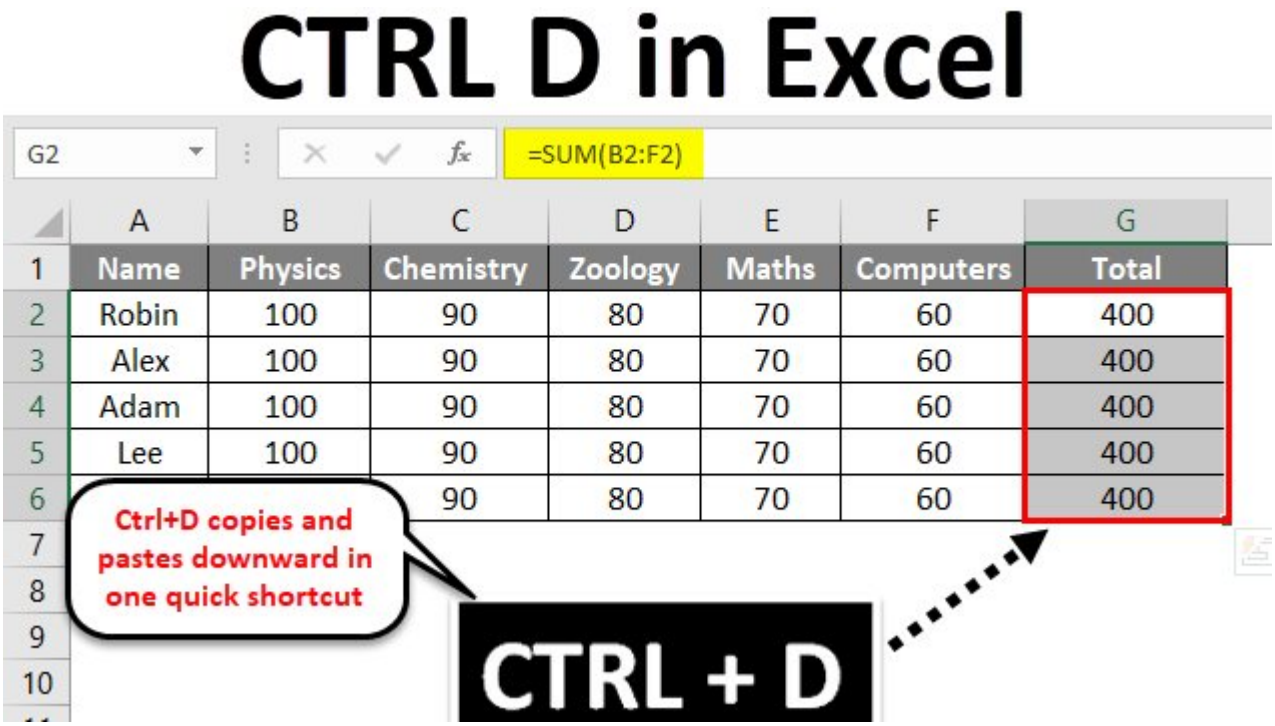


	A	B	C
1	**Wildcard**	**How to work**	**Examples**
2	?	Single text character	"A", "B", "a", "b", etc.
3	??	Double text Character	"PK","xy","im" etc.
4	?*	One or greater than one character	"a", "pk", "Raj", "XYZ", etc.
5	??*	Two or greater than two character	"ab", "pk", "Jack", "Sunday", etc.
6	(???)	3 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.
10	*PK*	Contains "PK"	"PK's Chart","Who is PK?", "Me and PK are working together" etc.
11	*~?	Ends in question mark	"How are you?" etc.
12	~**	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

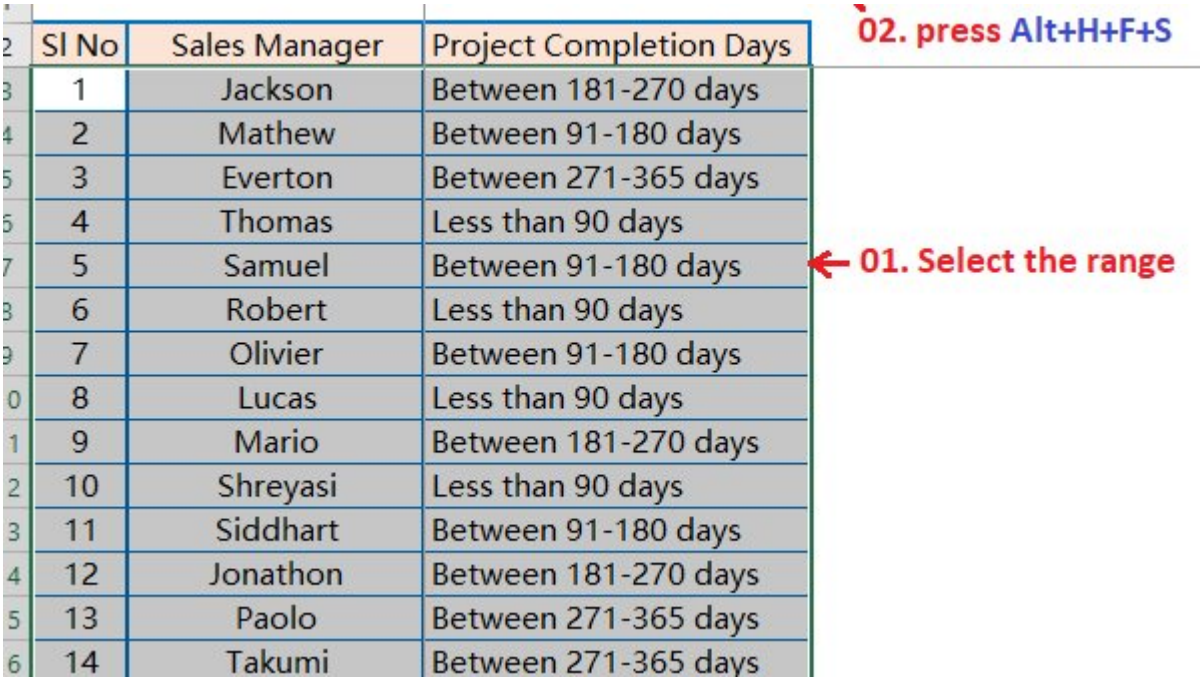


	A	B	C	D	E	F	G
1	Name	Physics	Chemistry	Zoology	Maths	Computers	Total
2	Robin	100	90	80	70	60	400
3	Alex	100	90	80	70	60	400
4	Adam	100	90	80	70	60	400
5	Lee	100	90	80	70	60	400
6			90	80	70	60	400

(3) Remove Duplicates

Remove duplicates in a set of data in Excel

Alt+A+M



Sl 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

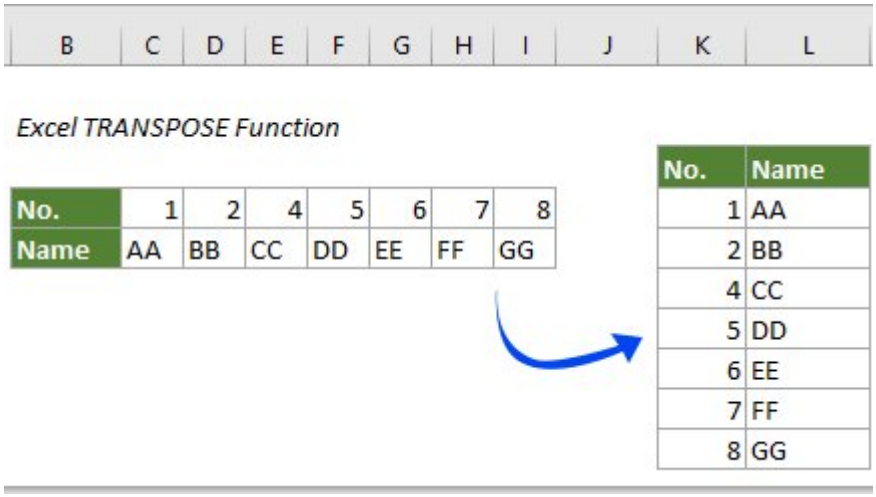
(4) Transpose

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



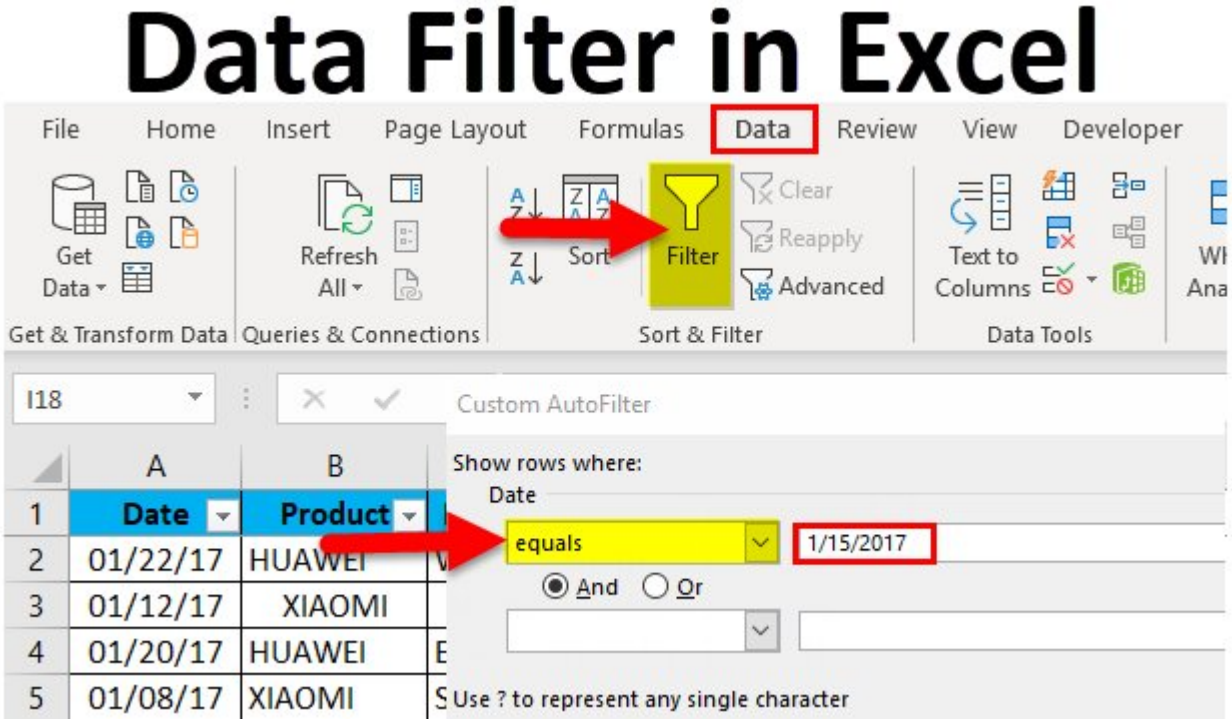
(5) Filter

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.

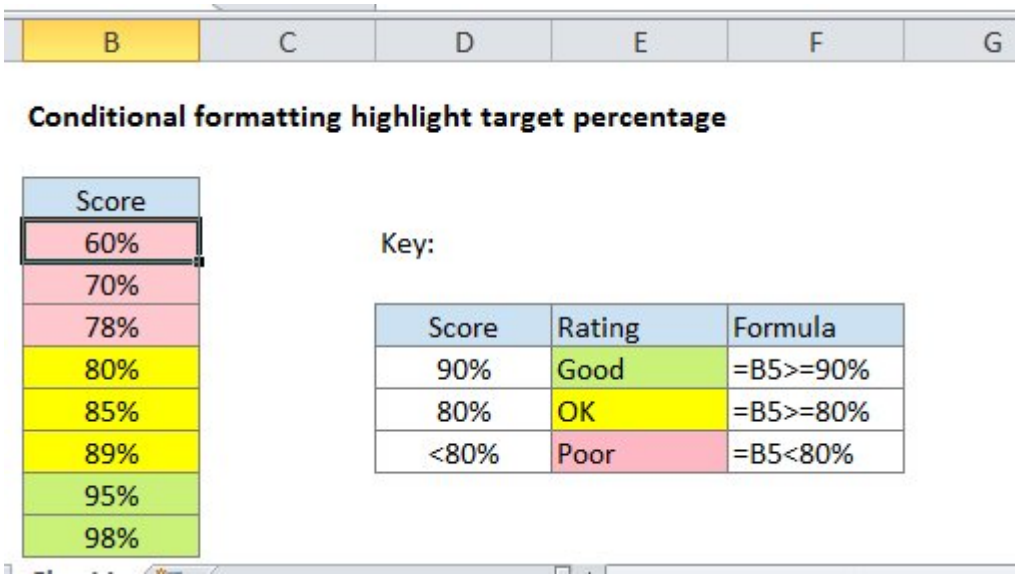
The shortcut for this function is CTRL + SHFT + L



(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



Conditional formatting highlight target percentage

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

Key:

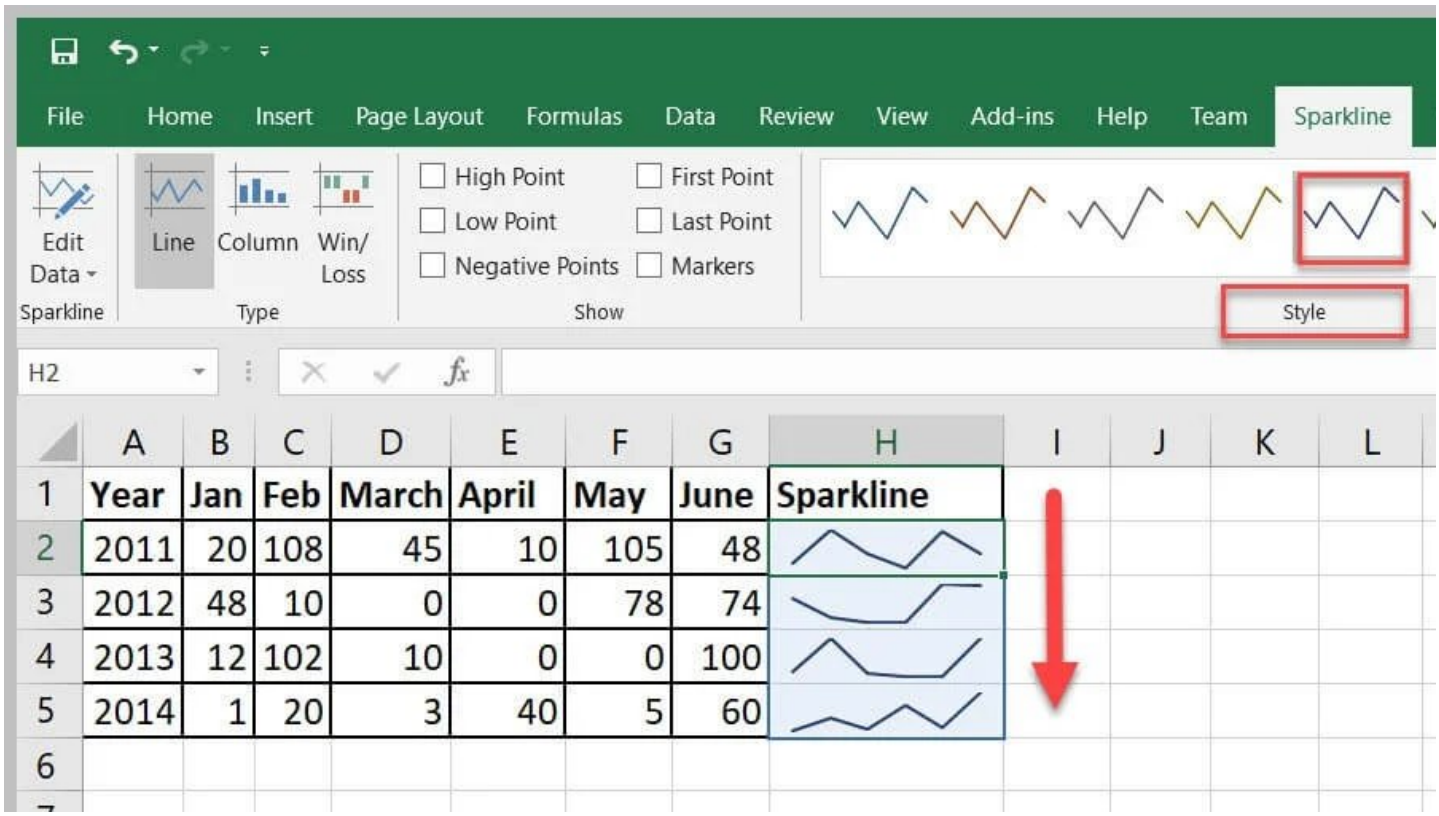
Score	Rating	Formula
90%	Good	=B5>=90%
80%	OK	=B5>=80%
<80%	Poor	=B5<80%

(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'

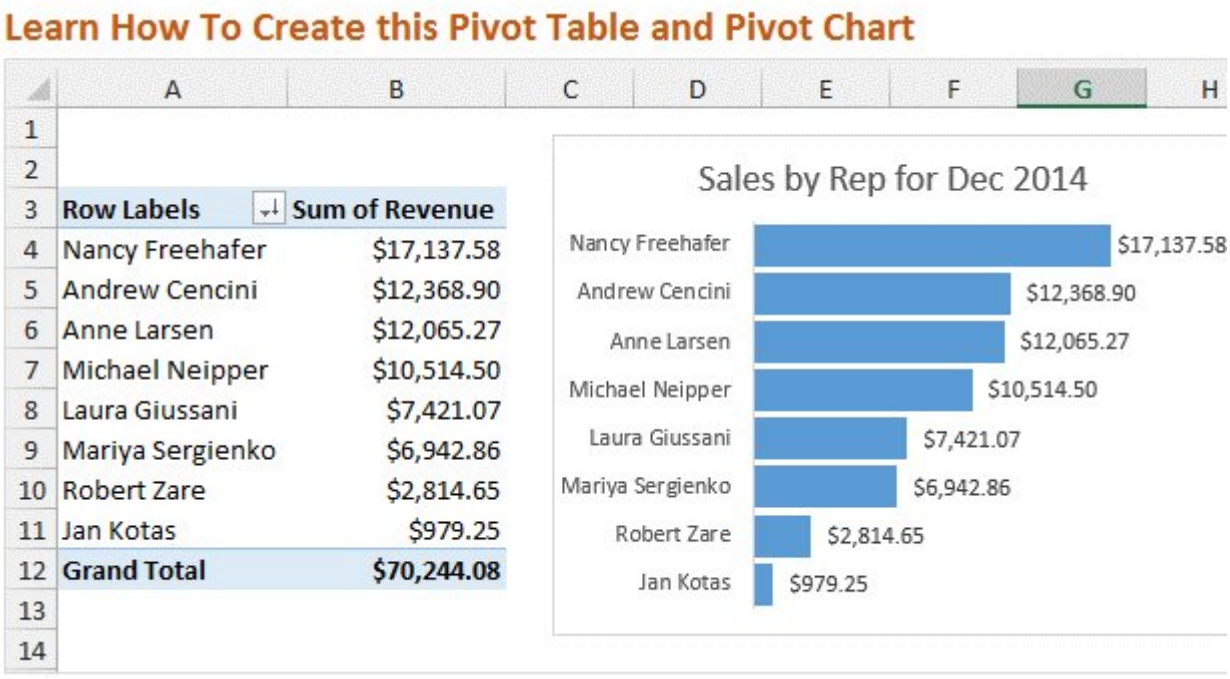


	A	B	C	D	E	F	G	H
1	Year	Jan	Feb	March	April	May	June	Sparkline
2	2011	20	108	45	10	105	48	
3	2012	48	10	0	0	78	74	
4	2013	12	102	10	0	0	100	
5	2014	1	20	3	40	5	60	
6								

(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"

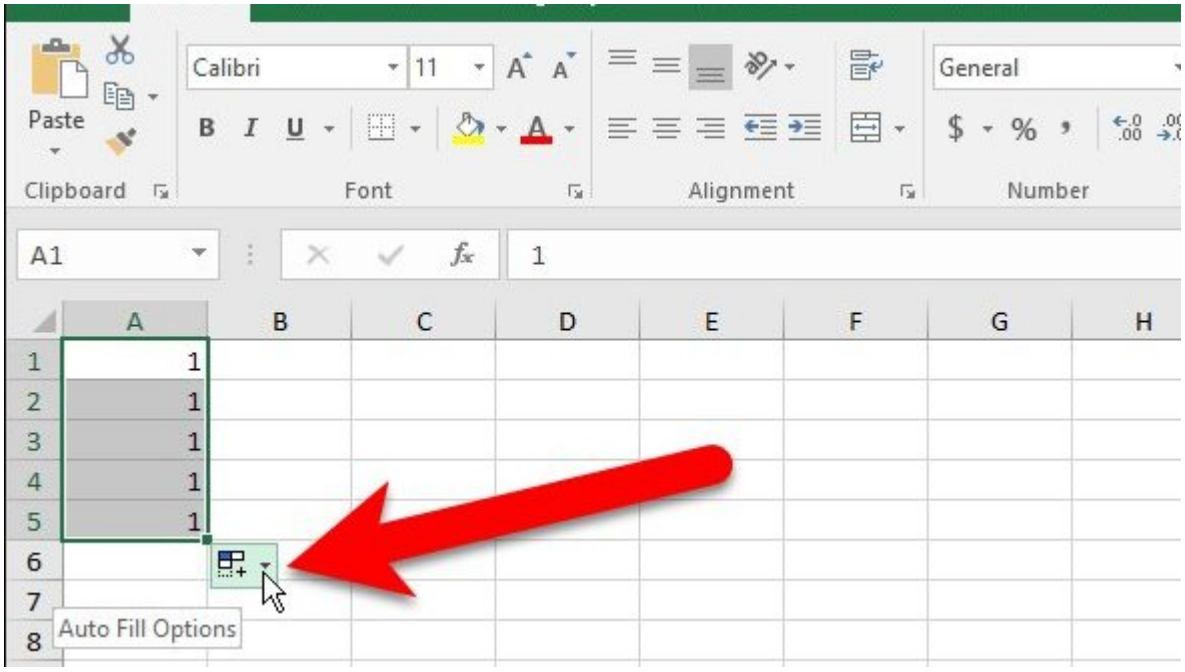


(9) Auto-fill

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

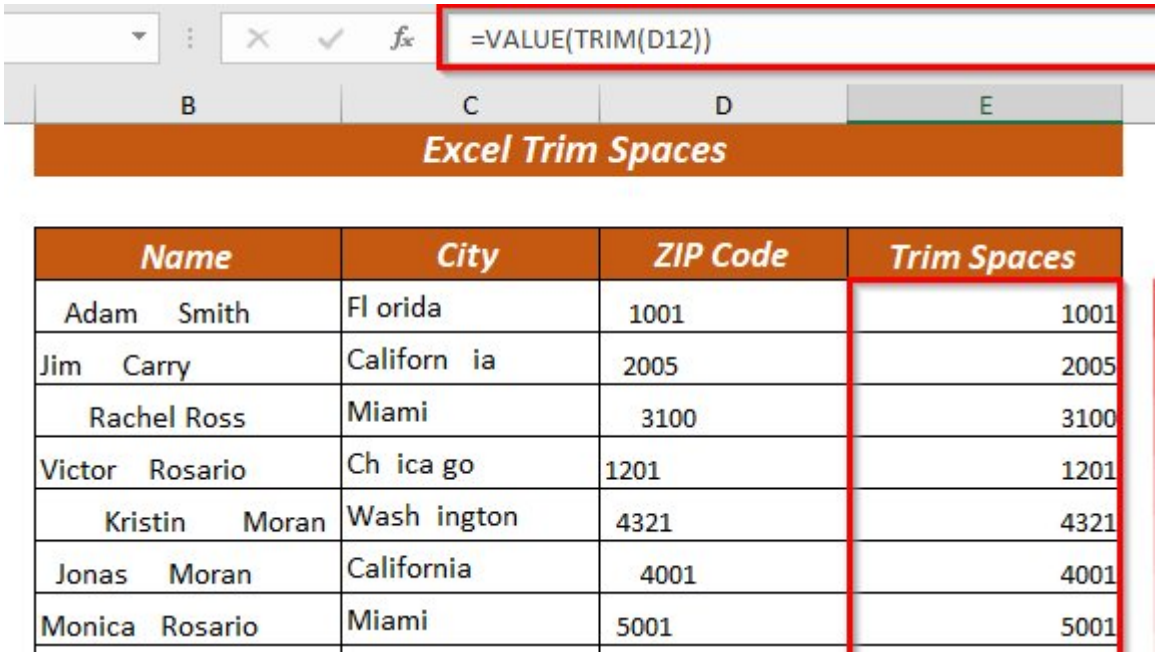


(10) TRIM

TRIM helps to remove the extra spaces in data.

TRIM can be useful in removing irregular spacing from imported data

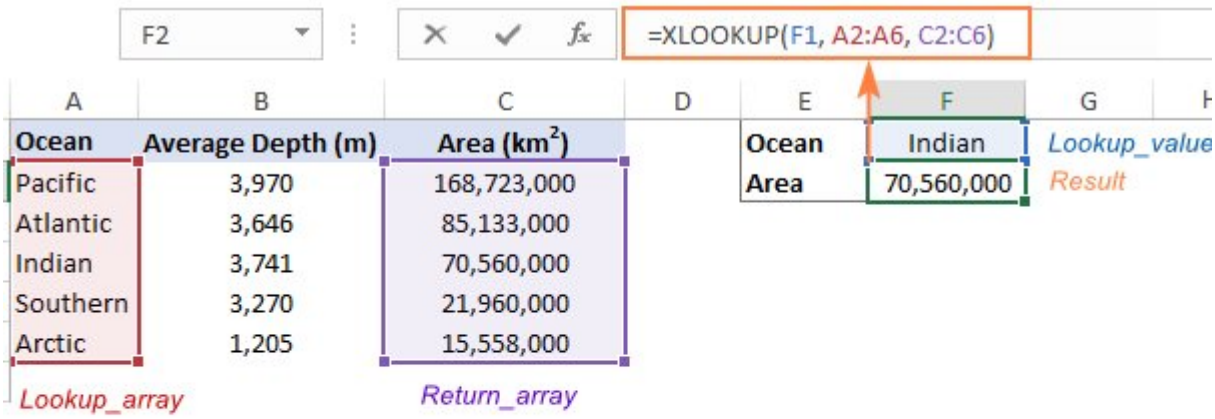
=TRIM()



(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)



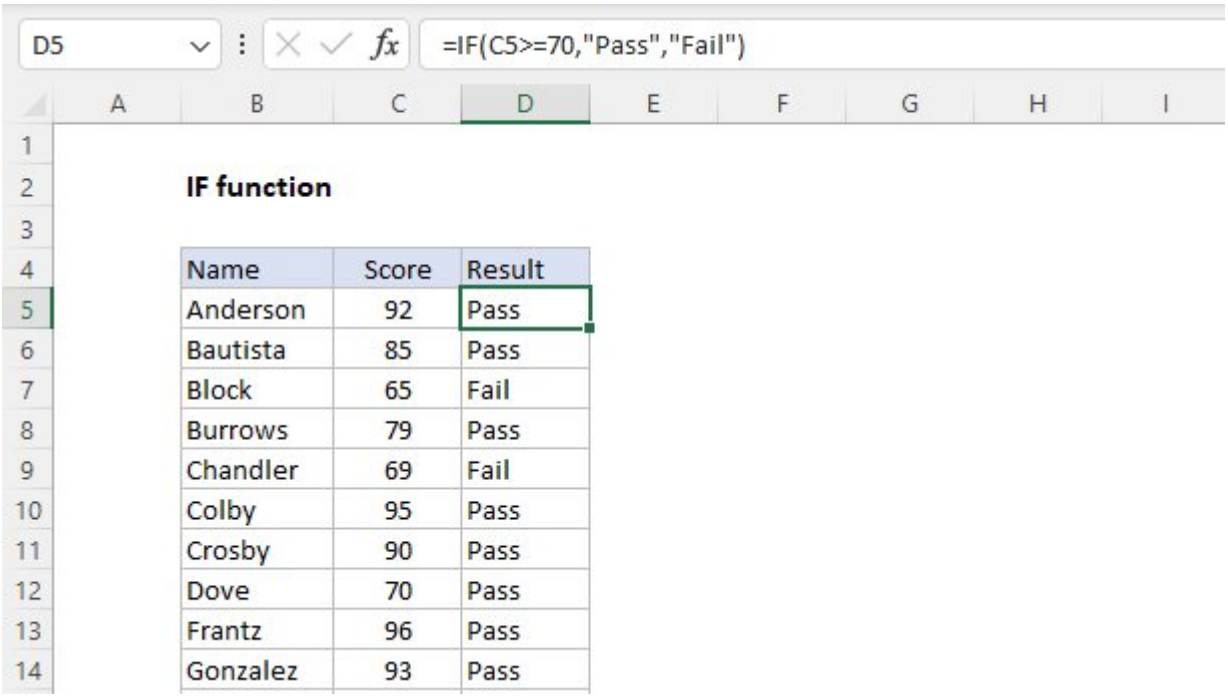


(12) IF

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"

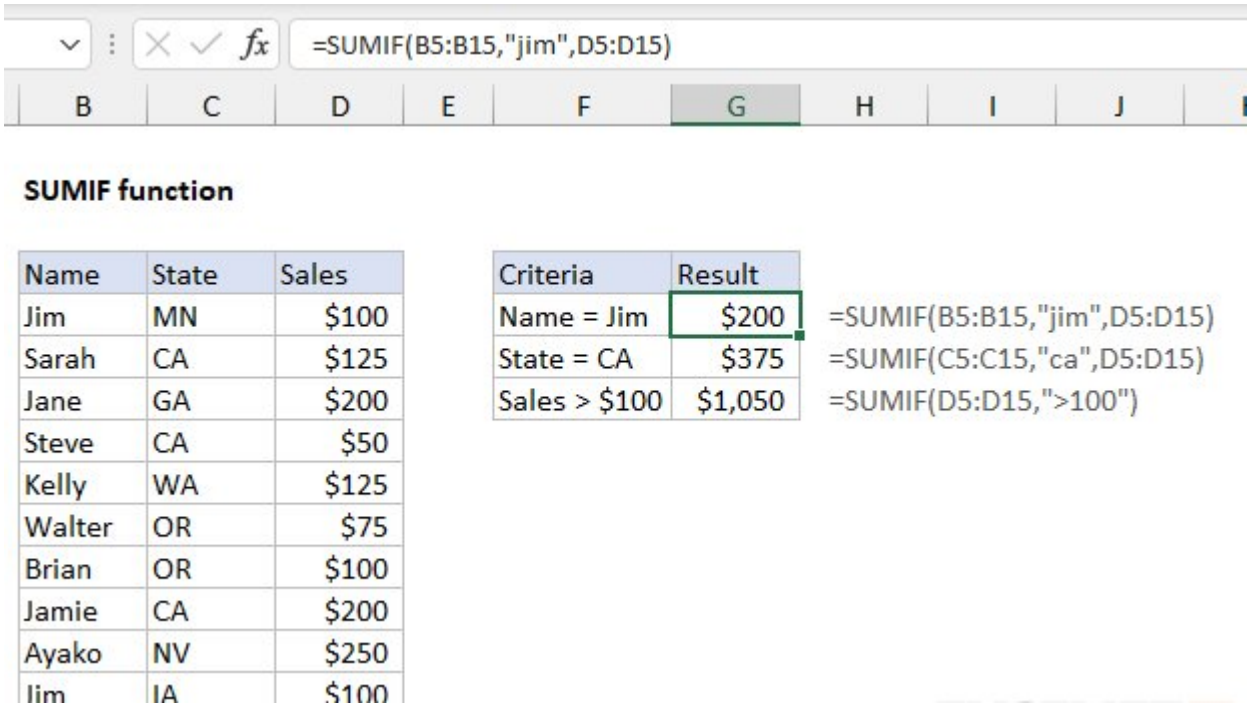
An example of this formula would be =IF(C5>70,"Pass","Fail")



(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.

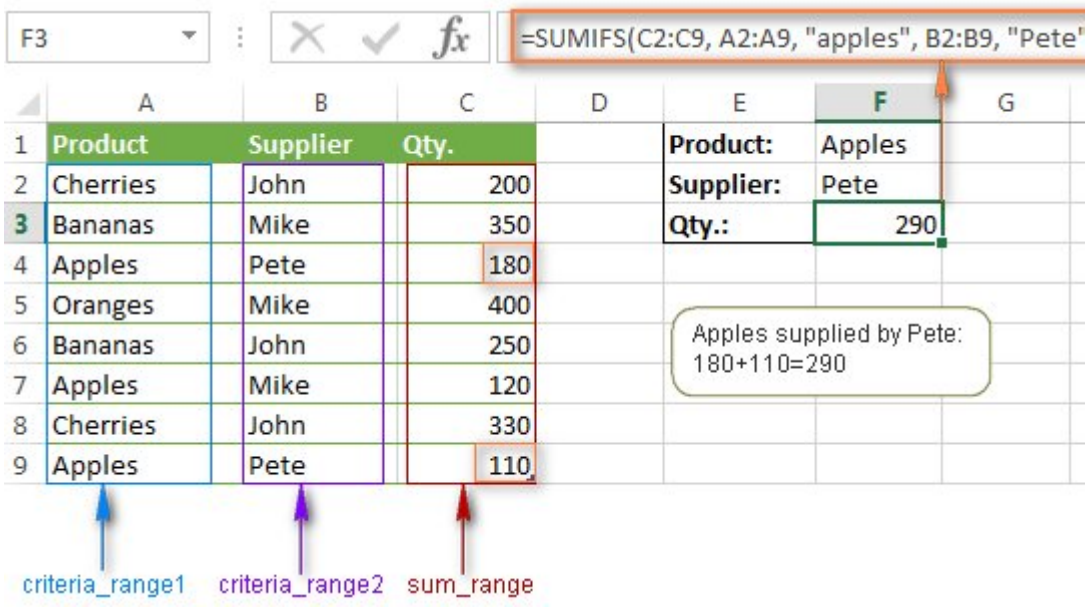


(14) SUMIFS

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.

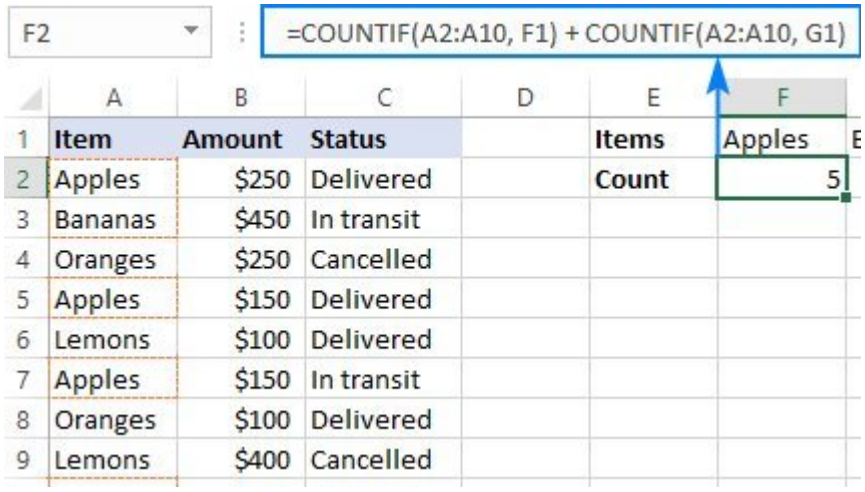
The formula is SUMIFS (sum_range, criteria_range1, criteria1, [criteria_range2, criteria2], ...)



(15) COUNTIF

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

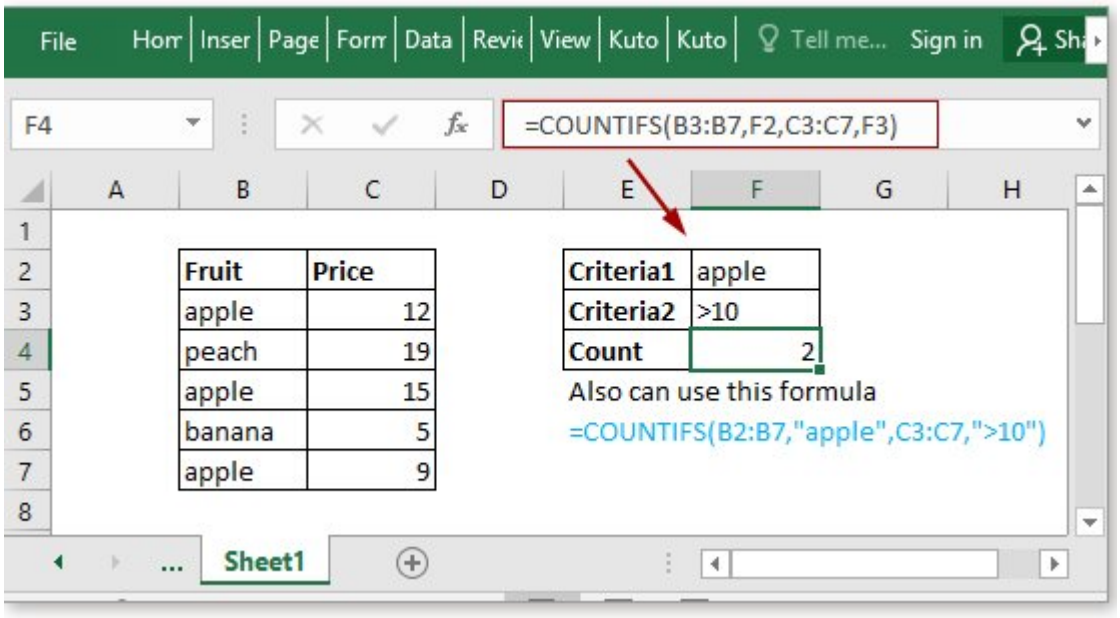
For example, you can count the number of times a particular word has been listed in a row or column.



(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.



(17) UPPER, LOWER, PROPER

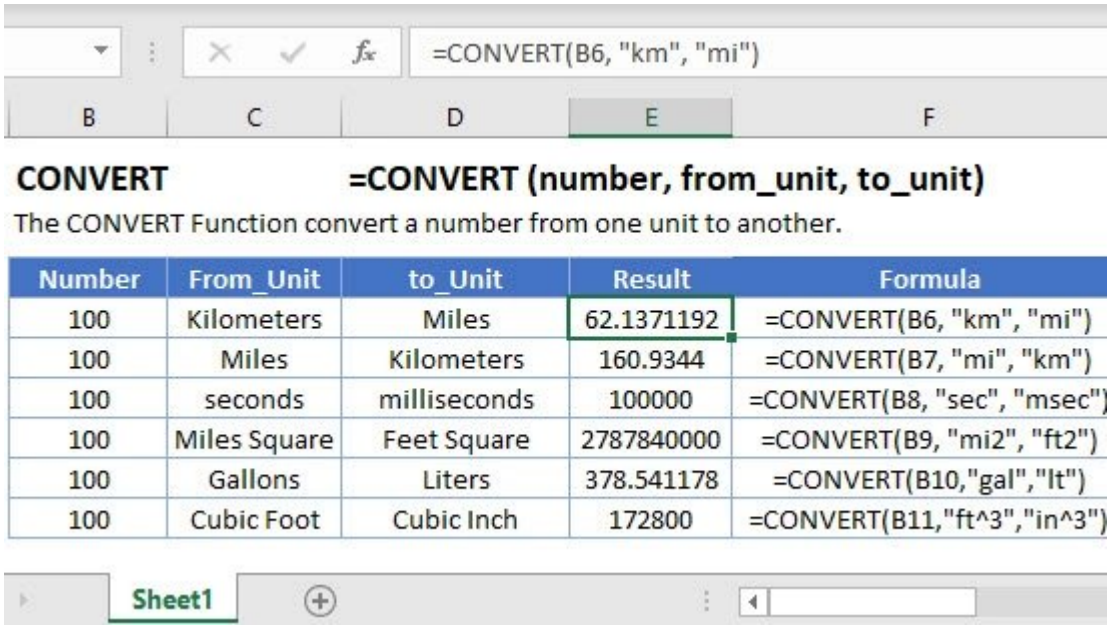
=UPPER, Converts text to all uppercase,
=LOWER, Converts text string to lowercase,
=PROPER, Converts text to proper case

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.



(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

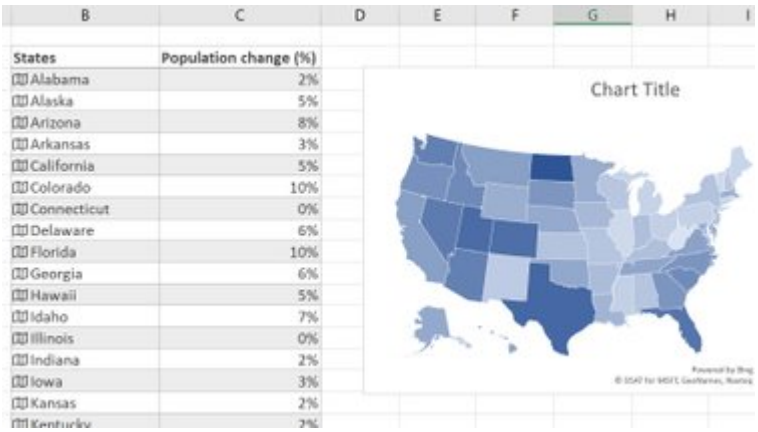
	A	B	C	D	E
1	Company	🏛 Microsoft Corp	🏛 Barclays PLC	🏛 Royal Dutch Shell PLC	🏛 Nestle India Ltd
2	Ticker symbol	MSFT	BARC	R6C3	500790
3	Exchange	NASDAQ	London	Xetra	Mumbai
4	Exchange abbreviation	NAS	LON	ETR	BOM
5	Currency	USD	GBX	GBP	INR
6	Previous close	$ 110.19	162.88	£ 27.40	10,718.95 ₹
7	Open	$ 110.70	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

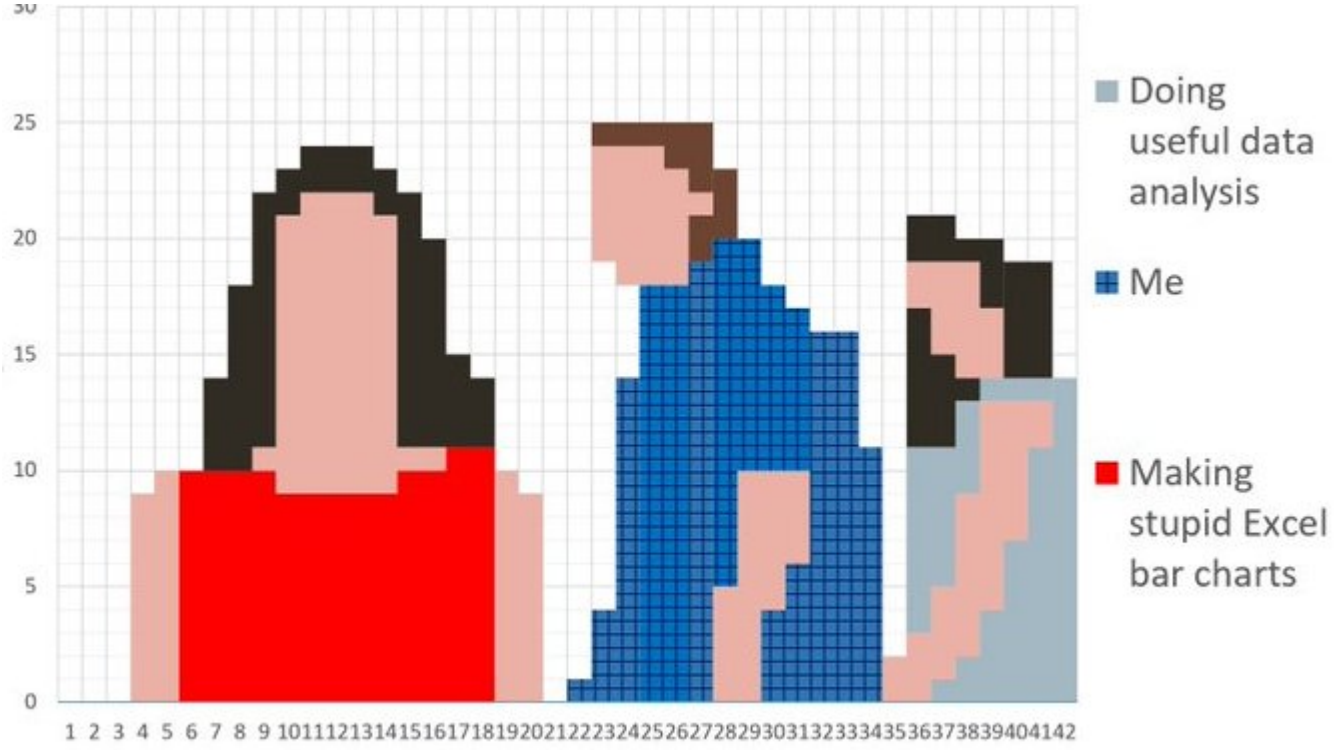
With the Geography data type, you can retrieve data like population, time zone, area leaders, gasoline prices, language, and more

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



BONUS:

You can use Microsoft Excel to create art



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