Twitter Thread by <u>Andrew talks Money, Investing, Stocks & Crypto</u>

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.
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.
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

G2		:	×	✓	fx	=SUM(B2:F2)		

◢	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
7		Ctrl+D copies and					
8		pastes downward in					
		one quick shortcut					
9							
10							

CTRL + D

(3) Remove Duplicates

Remove duplicates in a set of data in Excel

Alt+A+M

	SI No	Sales Manager	Project Completion Days
2	1	Jackson	Between 181-270 days
3	2	Mathew	Between 91-180 days
4	3	Everton	Between 271-365 days
5	4	Thomas	Less than 90 days
6	5	Samuel	Between 91-180 days
7	6	Robert	Less than 90 days
8	7	Olivier	Between 91-180 days
9	8	Lucas	Less than 90 days
0	9	Mario	Between 181-270 days
1	10	Shreyasi	Less than 90 days
2	11	Siddhart	Between 91-180 days
3	12	Jonathon	Between 181-270 days
4	13	Paolo	Between 271-365 days
5	14	Takumi	Between 271-365 days

02. press Alt+H+F+S

← 01. Select the range

(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.

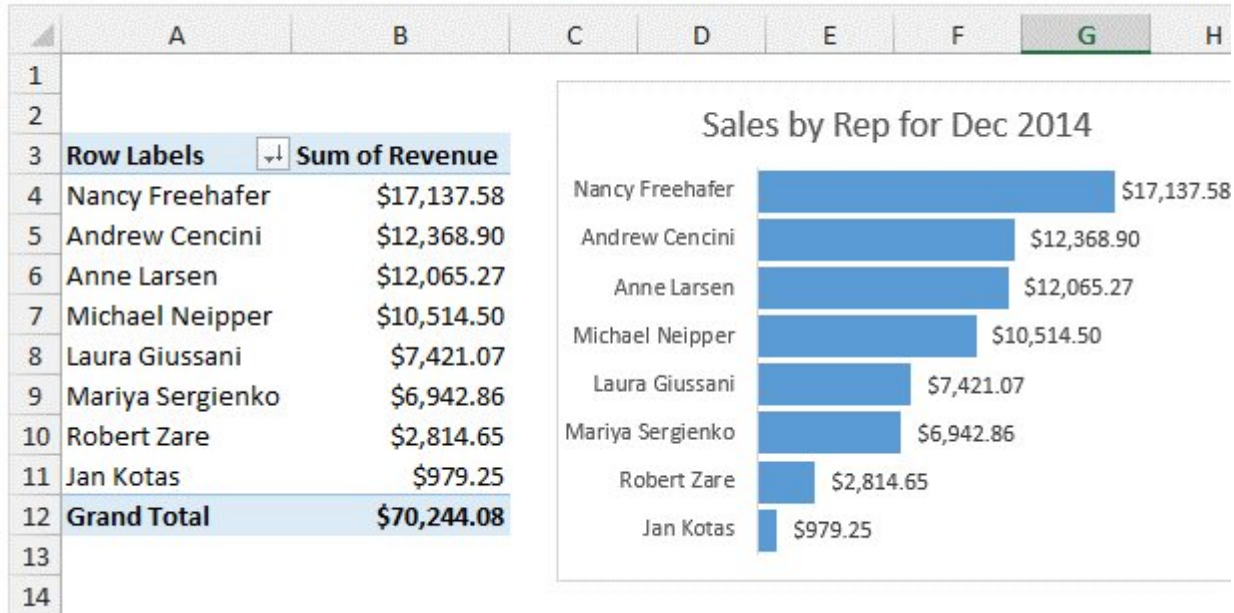On the 'Insert tab', click 'Sparklines'

(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

|	A	B	C	D	E	F	G	H
1								
2			Sales by Rep for Dec 2014					
3	Row Labels	Sum of Revenue						
4	Nancy Freehafer	$17,137.58	Nancy Freehafer				$17,137.58	
5	Andrew Cencini	$12,368.90	Andrew Cencini			$12,368.90		
6	Anne Larsen	$12,065.27	Anne Larsen			$12,065.27		
7	Michael Neipper	$10,514.50	Michael Neipper			$10,514.50		
8	Laura Giussani	$7,421.07	Laura Giussani		$7,421.07			
9	Mariya Sergienko	$6,942.86	Mariya Sergienko		$6,942.86			
10	Robert Zare	$2,814.65	Robert Zare	$2,814.65				
11	Jan Kotas	$979.25	Jan Kotas	$979.25				
12	Grand Total	$70,244.08						
13								
14								

(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
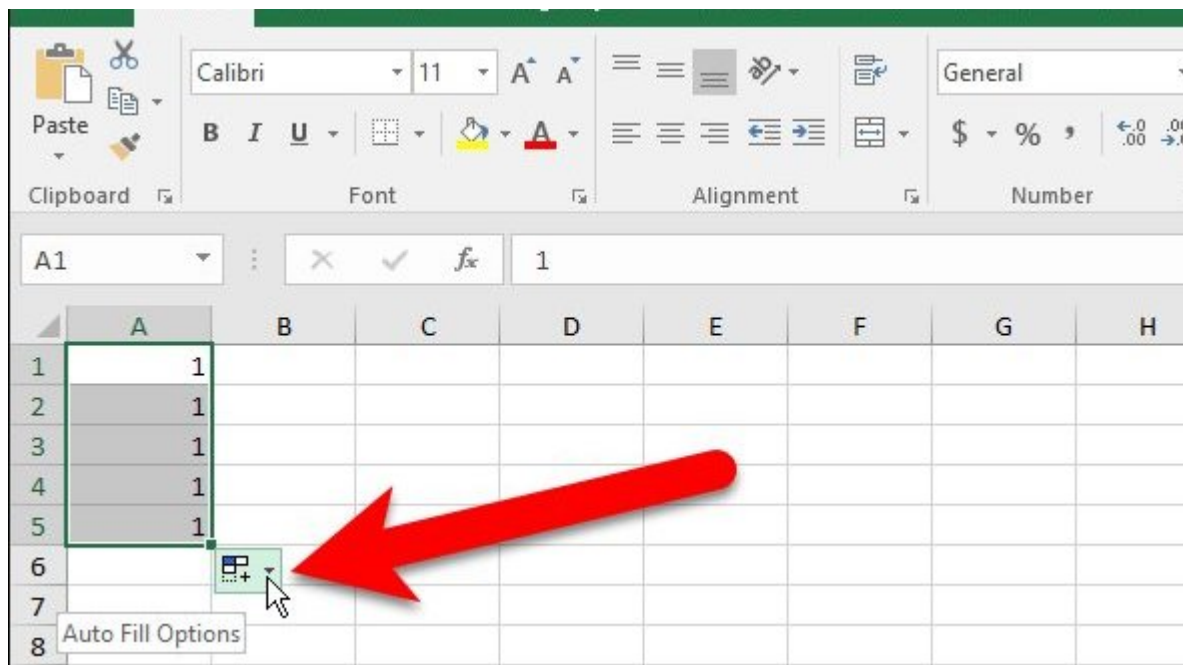
(10) TRIM

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 | ▼ | : | ✕ | ✓ | f_x | =XLOOKUP(F1, A2:A6, C2:C6) |

	A	B	C		D	E	F	G	H
	Ocean	Average Depth (m)	Area (km²)			Ocean	Indian	*Lookup_value*	
	Pacific	3,970	168,723,000			Area	70,560,000	*Result*	
	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 | ∨ | : | ✕ ✓ | f_x | =IF(C5>=70,"Pass","Fail") |

	A	B	C	D	E	F	G	H	I
1									
2		**IF function**							
3									
4		Name	Score	Result					
5		Anderson	92	Pass					
6		Bautista	85	Pass					
7		Block	65	Fail					
8		Burrows	79	Pass					
9		Chandler	69	Fail					
10		Colby	95	Pass					
11		Crosby	90	Pass					
12		Dove	70	Pass					
13		Frantz	96	Pass					
14		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.

SUMIF function

Name	State	Sales		Criteria	Result	
Jim	MN	$100		Name = Jim	$200	=SUMIF(B5:B15,"jim",D5:D15)
Sarah	CA	$125		State = CA	$375	=SUMIF(C5:C15,"ca",D5:D15)
Jane	GA	$200		Sales > $100	$1,050	=SUMIF(D5:D15,">100")
Steve	CA	$50				
Kelly	WA	$125				
Walter	OR	$75				
Brian	OR	$100				
Jamie	CA	$200				
Ayako	NV	$250				
Jim	IA	$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		Apples supplied by Pete:		
7	Apples	Mike	120		180+110=290		
8	Cherries	John	330				
9	Apples	Pete	110				

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	E
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 | Hom | Inser | Page | Form | Data | Revie | View | Kuto | Kuto | ♀ Tell me… | Sign in | ♀ Sha ▶ |

| | F4 | ▼ | : | × ✓ | f_x | =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								

Sheet1

(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.

			fx	=CONVERT(B6, "km", "mi")	
B	C		D	E	F

CONVERT =CONVERT (number, from_unit, to_unit)

The CONVERT Function convert a number from one unit to another.

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

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

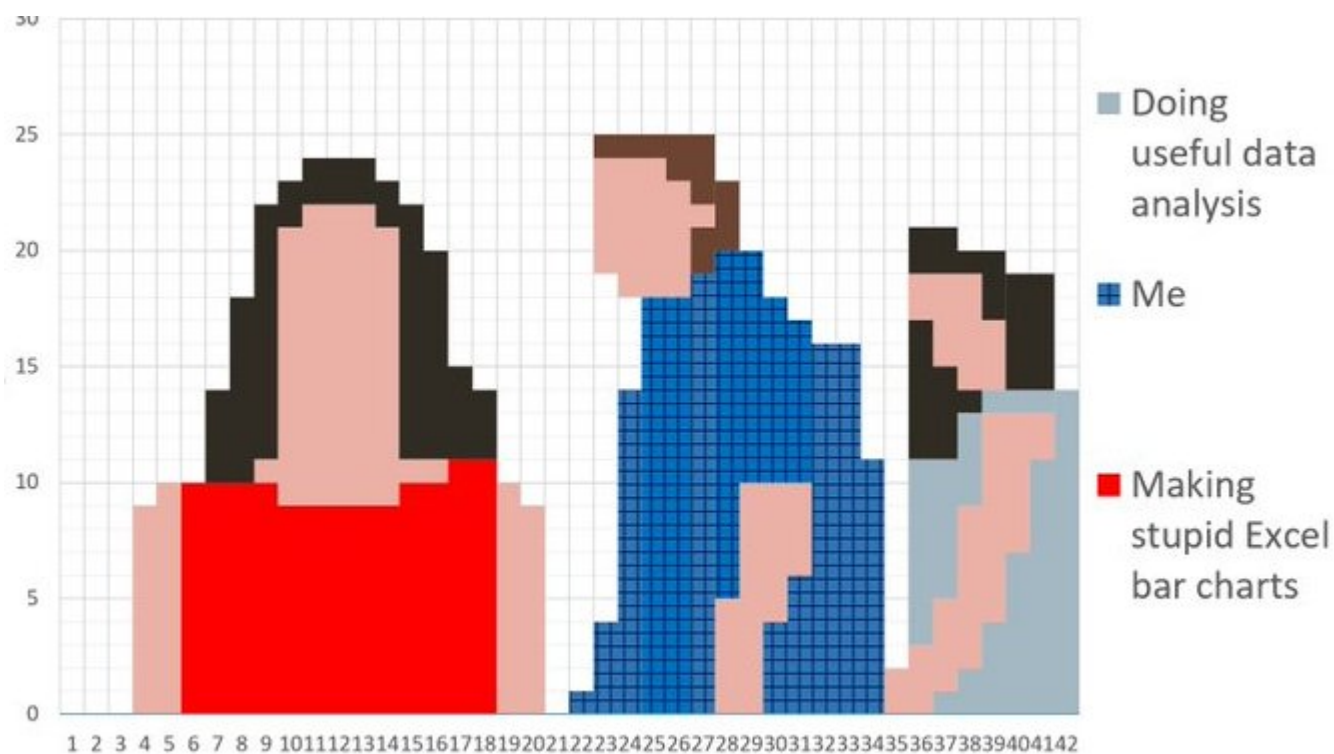Instead of researching geographical data or maps, use Excel

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
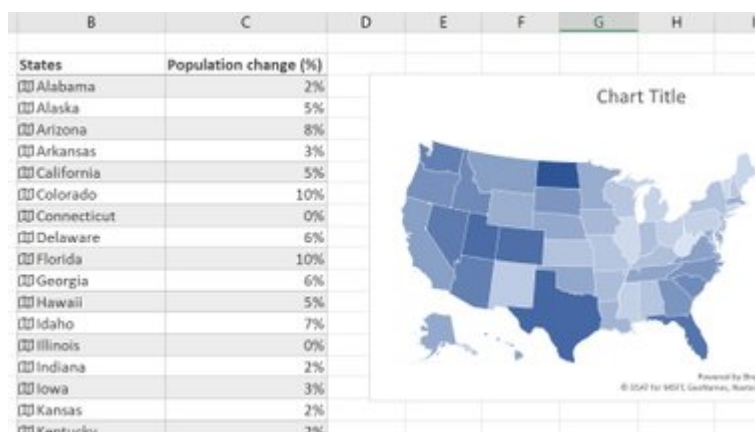
BONUS:

You can use Microsoft Excel to create art

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