

 Basics of Excel

**© EduPristine**

**Excel is one of the most widely used tools in financial industry**

* Easy to use
* High reach and access to software across geographies
* Flexibility
* Robustness
* Inbuilt features (Most people would not even be using 95% of the features) & Extendibility
* Modular and Object-Oriented Architecture

**Excel as a data-store**

* Easy to store and retrieve information
* Flexibility to put many data types in the same sheet

**Functions and a range of features**

* Excel is easily extendible to be used as a Modeling tool





|  |
| --- |
| **Basic Editing and Saving Excel** |
| CTRL + S | Save workbook |
| CTRL + C | Copy |
| CTRL + V | Paste |
| CTRL + X | Cut |
| CTRL + Z | Undo |
| CTRL + A | Select all |
| CTRL + B | Bold |
| ALT + TAB | Switch program |
| ALT + F4 | Close program |
| CTRL + TAB | Switch workbooks |

|  |
| --- |
| **Formatting** |
| CTRL + 1 | Format Box |
| ALT + H + 0 | Increase decimal |
| ALT + H + 9 | Decrease decimal |
| SHIFT + CTRL + ~ | General format |
| SHIFT + CTRL + ! | Number format |
| SHIFT + CTRL + # | Date format |
| SHIFT + CTRL + $ | Currency format |
| SHIFT + CTRL + % | Percentage format |
| CTRL + ; | Enter the date |

 



Array (Can be loosely thought of as a list) is a group of cells or values that Excel treats as a unit.

* No longer treats the cells individually, but list of cells as an individual entity
* Since individual cells are not independent entities, so they cannot be changed individually
* Enables applying a formula to every cell in the range using just a single operation



.

To Run Array Functions – Remember to use Copy + Alt E, S, E



|  |
| --- |
| **Frequently Used Array Functions** |
| **Function Name** | **Function** |
| SUMPRODUCT() | To Sum product 2 matrices |
| TRANSPOSE() | To transpose a matrix |
| MATCH() | Used in conjunction as a lookup function |
| INDEX() | Used in conjunction as a lookup function |
| VLOOKUP() | To lookup for a particular value in an array, with the starting column acting as a lookup reference |
| COLUMN() | Returns the column number of the cell referenced |
| ROW() | Returns the row number of the cell referenced |
| HLOOKUP() | To lookup for a particular value in an array, with the top row acting as lookup reference |

* VLOOKUP() function
	+ The V in VLOOKUP() stands for vertical
	+ Works by looking in the first column of a table for the value you specify

* + It then looks across the appropriate number of columns (which you specify) and returns whatever value it finds there
	+ The final option (range\_lookup) is a Boolean value that determines how Excel finds the value. Always use **FALSE- for exact match**
	+ Whenever looking for data picked from the net, trim the strings before comparison

One of the most widely used functions in Excel.



HLOOKUP() function

* H in HLOOKUP() stands for horizontal
* Similar to VLOOKUP()
* It searches for the lookup value in the first row of a table

Both Vlookup and Hlookup have a limitation of using the first Column/ Row as a reference.





INDEX() returns the reference or the value of a cell at the intersection of a row and column inside a reference.



MATCH() function

•

•

Looks through a row or column of cells for a value

If it finds a match, it returns the relative position of the match in the row or column





Thank You!

**© EduPristine**