SUSS INVESTMENT GROUP

# Session 3

## Chart Plotting & Formatting

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**Prepared by**: Ezekiel Woo, Tan Ki Siong

# Lesson Outline

1. Chart Plotting
2. Formatting of:
    i. Charts
    ii. Report
    iii. Slides
    iv. Model

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# Commonly-Used Charts

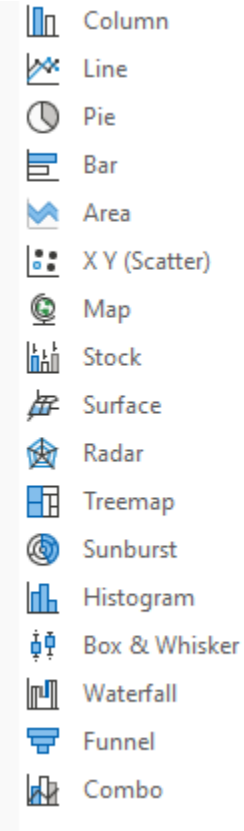
1. Visualising a pattern across time series (e.g., annual revenue or margins)
    1. Line chart
    2. Column chart
    3. Area chart

2. Showcasing relationships between variables (e.g., valuation multiple vs margins)
    1. Scatterplot
    2. Bubble chart

    } A regression line and/or r-squared value may be included

3. Showing quantitative data across different variables (e.g., revenue across competitors)
    1. Bar chart

4. Breakdown of a whole into constituent parts
    1. Pie chart or donut chart
    2. Sunburst chart
    3. Treemap (aka Mekko) chart
    4. Waterfall chart (e.g., product A + product B or revenue – expenses = profit)




List of standard charts available in Microsoft Office

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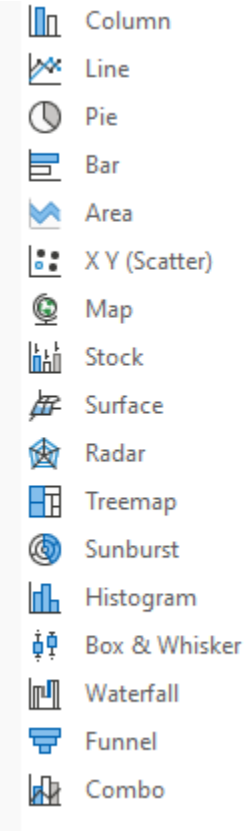
# Not-as-Commonly-Used Charts

1. Radar charts
   - To display scores across different categories (e.g., Porter Five Forces)

2. Football field chart
   - Essentially a stacked bar chart or stock chart used to display a valuation range
   - A simplified box & whisker chart
   - Not commonly used outside of banking

3. Histogram and Box & Whisker charts
   - For statistical usage

4. Funnel chart (aka tornado chart)
   - To display effect of each variable (typically used in Indirect Sensitivity Analysis)

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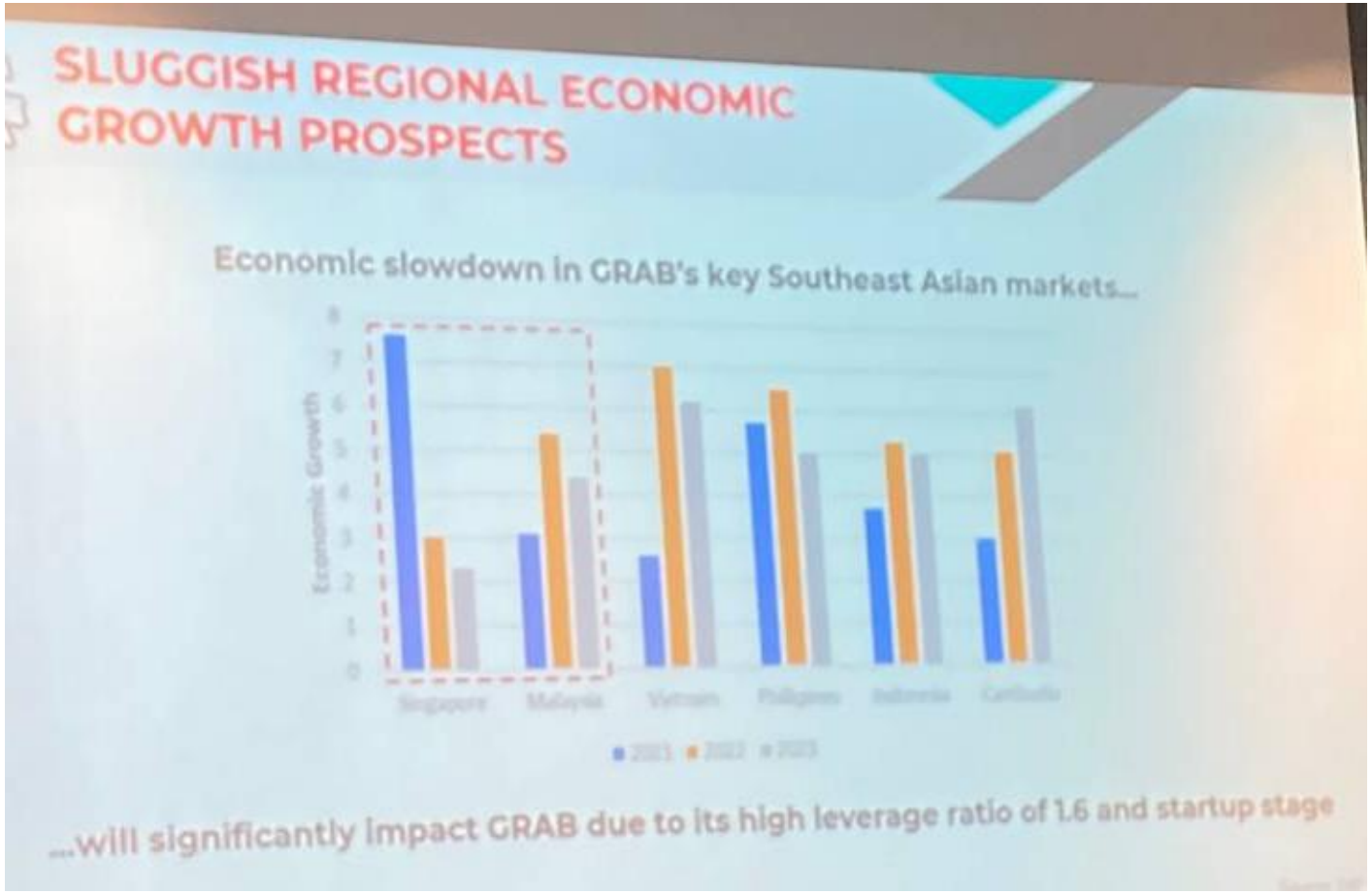
# Common Mistakes

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# Guidelines for Chart Formatting

1. Maximise the “data-to-ink ratio”
2. Simplify your chart (do not include too many things in one chart)
3. Standardise the colour scheme (do not use the default colour scheme)
4. Remove unnecessary items e.g., gridlines, labels
5. Re-look at your chart
6. Practise: let’s do it now!

File Download Link: Lesson 06 - Chart Plotting & Formatting.xlsx

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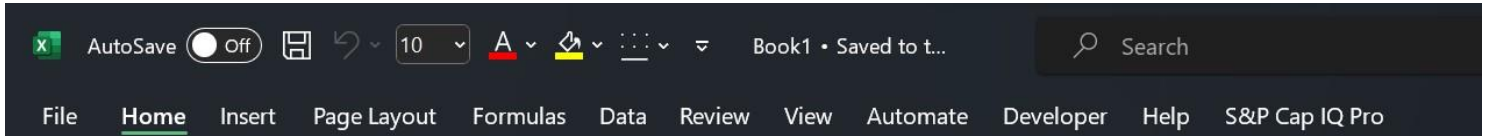
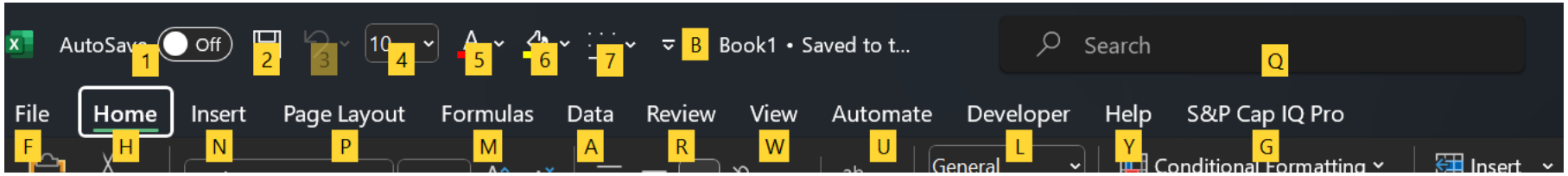
# Setting Up your Quick Access Toolbar

1. Go to Quick Access Toolbar
   - Alt + F + T + 00

2. Remove all existing commands with **<< Remove**

3. Add the following commands with **Add >>**
   - Font Size
   - Font Colour
   - Fill Colour
   - Borders

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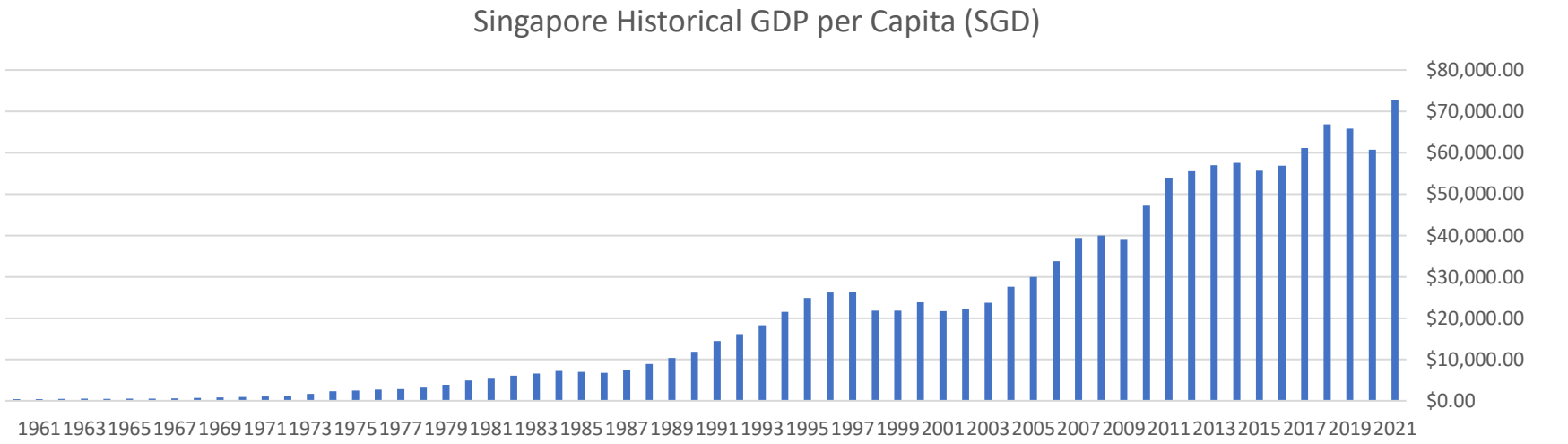
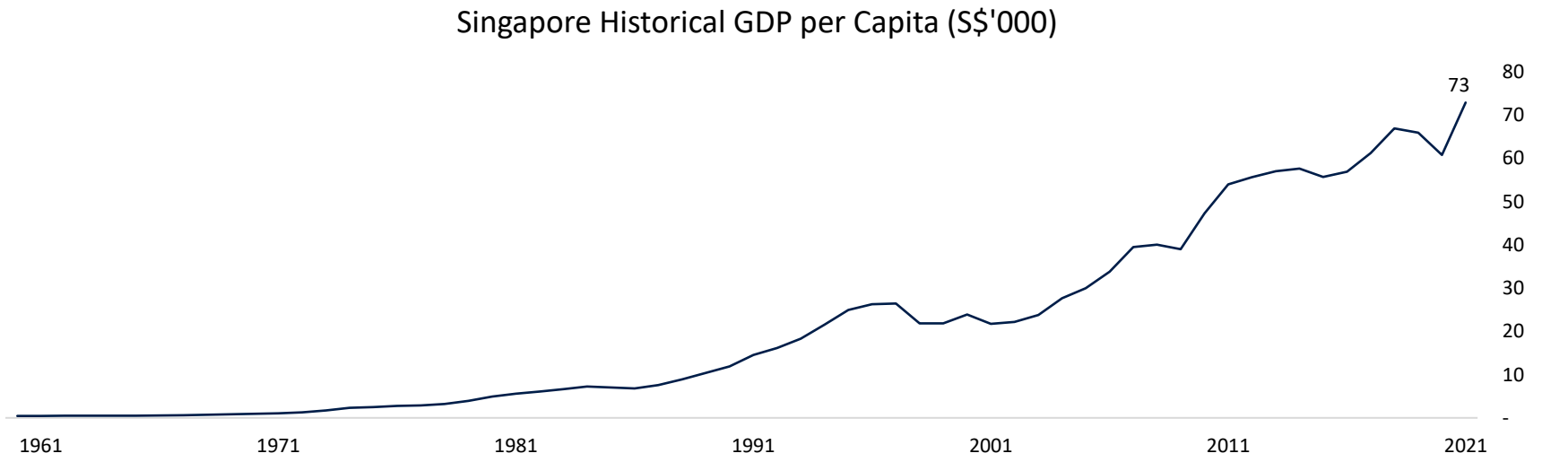
# Spot the Difference

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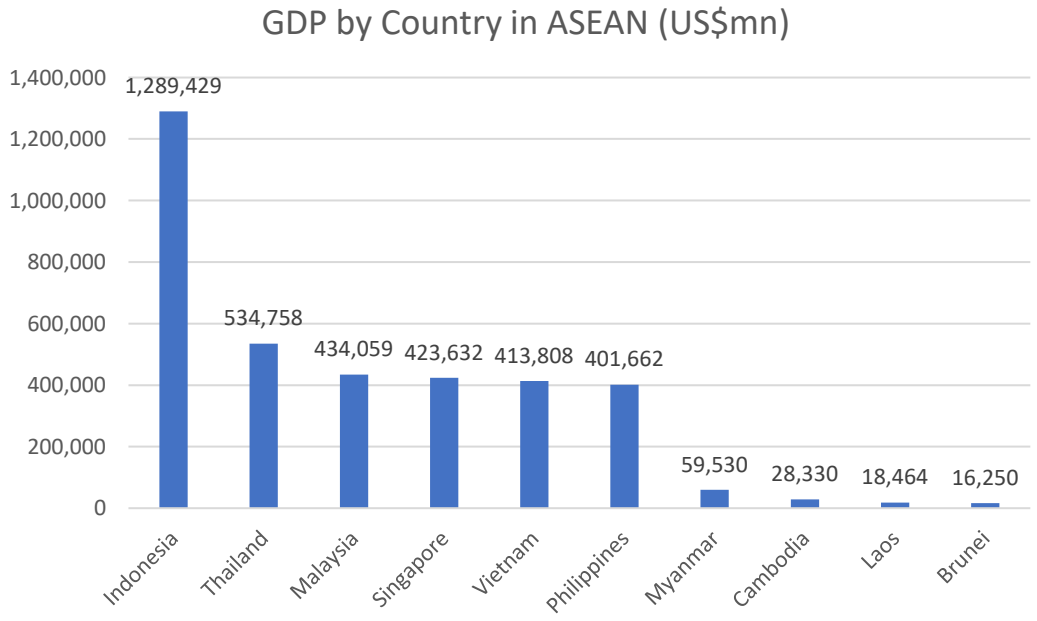


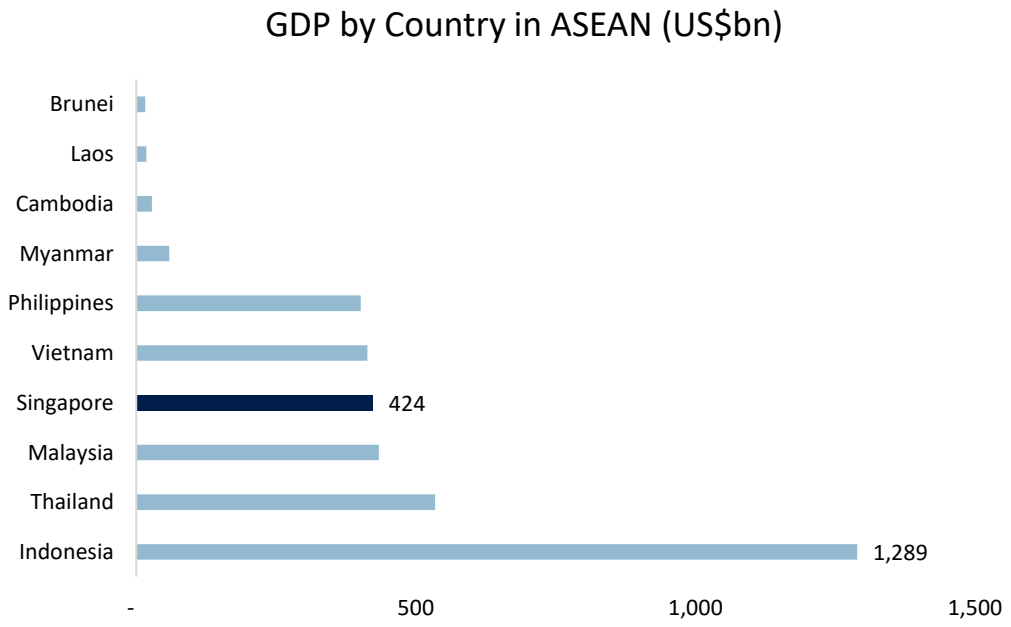


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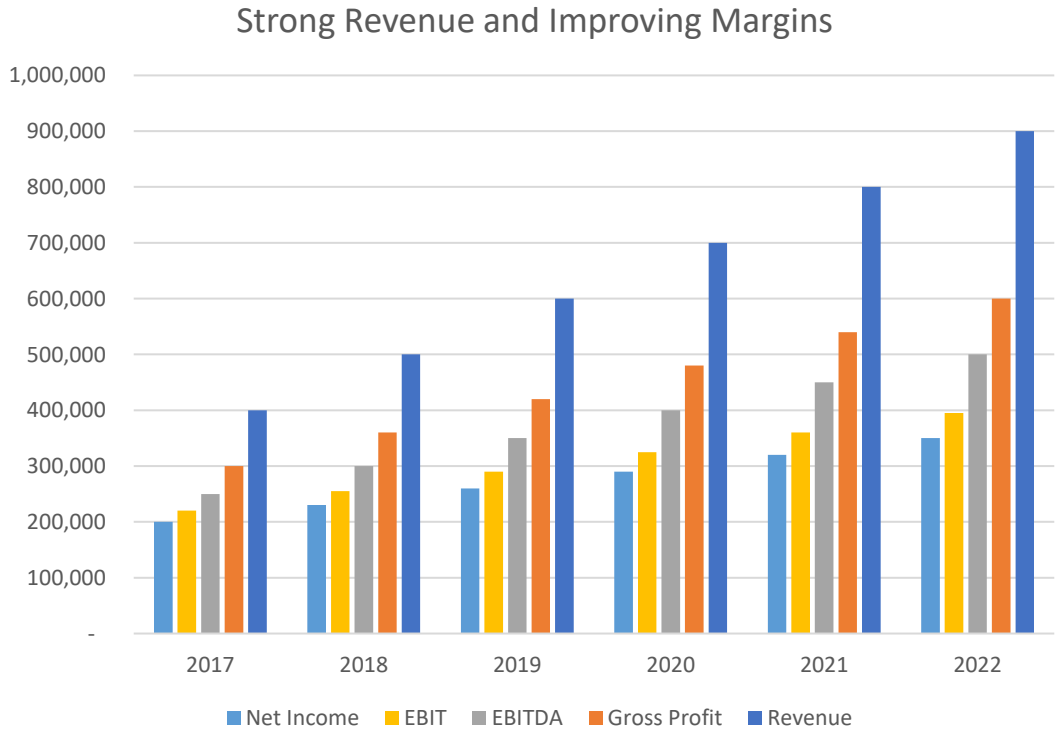


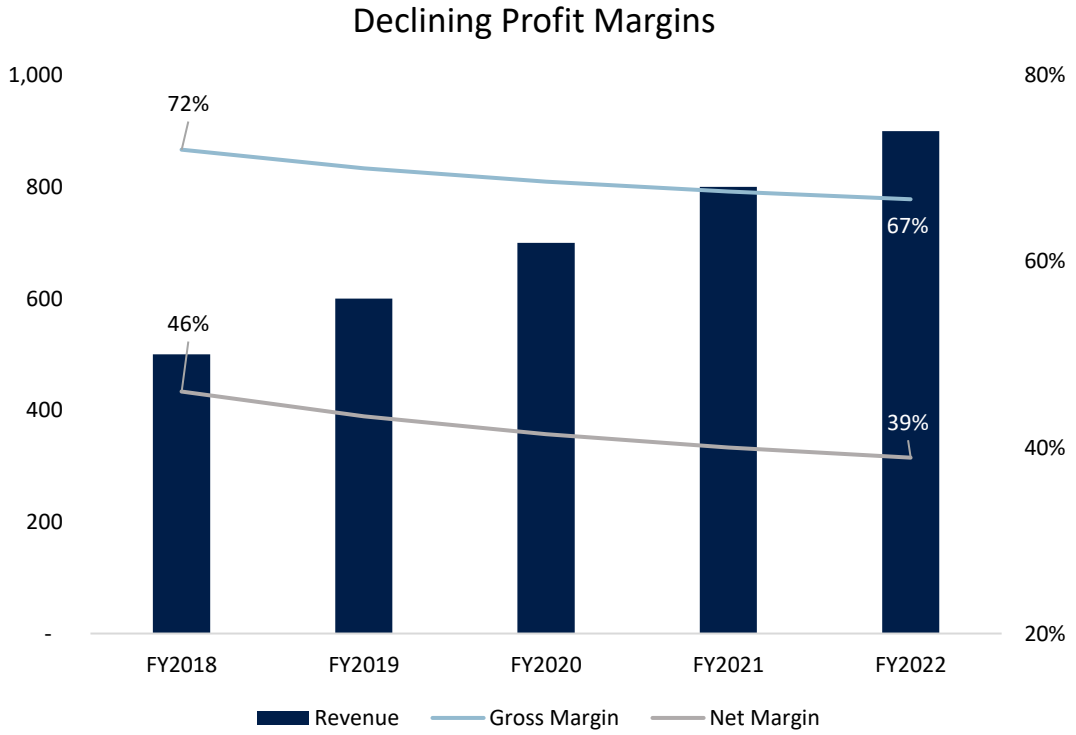


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# Thank You
# &
# See You Next Week!

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