Excel guide for data analysis

To carry out further analysis, you can download the dataset from the Data Deep Dive page or, if you are interested in the Brazilian Agriculture Finance Program and would like the extended smallholder dataset, you can download that from FAQ 10.

**Pivot tables:** to identify financiers of companies, or company clients of financiers

1. Select the columns (A-K) to highlight the full dataset

![Excel Pivot Table Example](image)

2. Go to insert > pivot table > new worksheet

3. Drag the column headers into the appropriate boxes in the **PivotTable Fields** box

**Example 1.** Identifying investors in Sinar Mas showing sectors

**Filters** include:

- Type (of finance) → select credit or investment (eg. bond- and share-holding)
- Group → select the company of interest (eg. Sinar Mas Group)
- Year → select timeframe (eg. 2021)
  - *nb. Credit data exists from 2013 by year up to 2021 (June) while Investment data is the most recent position based on filings in April 2021.*
Rows include:

- Bank → can be filtered to only show certain banks but here it shows all banks that have invested in Sinar Mas.

Columns include:

- Sector → can be filtered to only show certain sectors but here it shows all that Sinar Mas has investment in.

Values include:

- Sum of AmountUSDmillions → make sure this is set to “sum” and not “count”
  
  - nb. To change this, right click on the AmountUSDmillions > Value field settings > summarise by ... sum
Example 2. Identifying which countries FI’s are financing companies in each forest basin region, and by sector

Filters include:
- Type (of finance) → select credit (eg. bond issuance, corporate loan, revolving credit facility, share issuance)
- Year → select timeframe (eg. 2016-2021)
  - nb. Credit data exists from 2013 by year up to 2021 (June) while Investment data is the most recent position based on filings in April 2021.

Rows include:
- Country → the country that the FI’s HQ is located
- Sector → can be filtered to only show certain sectors but here it shows all.

Columns include:
- Forest-risk client region → shows Southeast Asia, Latin America or Central & West Africa.

Values include:
- Sum of AmountUSDmillions → make sure this is set to “sum” and not “count”
  - nb. To change this, right click on the AmountUSDmillions > Value field settings > summarise by … sum

4. Order results by size by selecting the filter button to sort > descending > sort by “sum of AmountUSDmillion” (eg. banks from largest financier to smallest).
Creating graphs

Example 3. Pie charts
Good for summaries such as global investment by forest-risk basin, or MUFG credit by sector

1. Select the data you want to use for the pie chart, there must be 2 variables, eg. Forest risk basin and Amount USD Millions.

2. Click Insert > Insert Pie or Doughnut Chart, and then pick the chart you want.

3. Use the toolbar to Add chart elements such as data labels (eg. values or percentages) or to change colours

Example 4. Bar chart (single)
Good for trends by year

1. Select the data you want to use for the pie chart, there must be 2 variables, eg. Year and Amount USD Millions.

2. Click Insert > Insert Bar chart (eg. 2D column), and then pick the chart you want.

3. Use the toolbar to Add chart elements such as data labels (eg. values or percentages) or to change colours

4. If the data displays incorrectly, go to Chart design>Select data> then check if the correct data is highlighted for the X and Y axes. If not, you can manually select these by adding/removing your own Legend Entry
Example 5. Bar chart (multi)
- Good for multi-variable charts such as, top 10 investors globally by sector

1. Select the data you want to use for the pie chart, there must be 2 variables, eg. Forest risk basin and Amount USD Millions.

2. Click Insert > Insert Bar Chart (2D stacked bar), and then pick the chart you want.

3. Use the toolbar to Add chart elements such as data labels (eg. values or percentages) or to change colours.

4. If you want to show the top 10 investors with the largest on top you need to change the order from this:
Click on the bank/investor names to pull up the **Format Axis** box and go to **Axis options>Axis positions>Categories in reverse order**.