

Excel Tips June 2024

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To download the Excel file for these tips, go to <https://isaacgottlieb.com/excel-tips/>

1. Frequently used Financial Ratios


These are financial ratios you may be able to use

| Frequently used Financial Ratios | | | | | | | | | | | | | | | | |
|----------------------------------|----|---|--|--|--|--|--|--|--|--|--|---|--|--|--|--|
| 3 | 4 | ROS = Return on Sales = $\frac{\text{Net Income}}{\text{Sales}}$ | | | | | | | | | | Total Leverage Ratio = $\frac{\text{Total Liabilities}}{\text{Total Liabilities \& Net Worth}}$ | | | | |
| 6 | 7 | ROIC = Return on Invested Capital = $\frac{\text{EBIT (1-t)}}{\text{All Interest Bearing Debt (+) Owner's Equity}}$ | | | | | | | | | | Debt Ratio = $\frac{\text{Total Debt}}{\text{Total Debt + Net Worth}}$ | | | | |
| 8 | 9 | ROE = Return on Equity = $\frac{\text{Net Income}}{\text{Owners' Equity}}$ | | | | | | | | | | Market Value Debt Ratio = $\frac{\text{Market Value of Debt}}{\text{Market Value of Debt + Market Value of Equity}}$ | | | | |
| 10 | 11 | Total Asset Turnover = $\frac{\text{Sales}}{\text{Total Assets}}$ | | | | | | | | | | Times Interest Earned = $\frac{\text{Earnings Before Interest and Taxes}}{\text{Interest}}$ | | | | |
| 12 | 13 | Inventory Turnover = $\frac{\text{Cost of Goods Sold}}{\text{Inventory}}$ | | | | | | | | | | Current Ratio = $\frac{\text{Current Assets}}{\text{Current Liabilities}}$ | | | | |
| 14 | 15 | Fixed Asset Turnover = $\frac{\text{Net Sales}}{\text{Net Fixed Assets}}$ | | | | | | | | | | Quick Ratio = $\frac{\text{Quick Assets}}{\text{Total Current Liabilities}}$ | | | | |
| 16 | 17 | Collection Period = $\frac{\text{Accounts Receivable}}{\text{Average Sales per Day}}$ | | | | | | | | | | Earnings/Share = EPS = $\frac{\text{Net Income Available to Common Stock}}{\text{Number of Common Shares Outstanding}}$ | | | | |
| 18 | 19 | Number of Days Payables = $\frac{\text{Accounts Payable}}{\text{Average Purchases per Day}}$ | | | | | | | | | | | | | | |

2. Making an Exact Copy of a Range of Formulas

If you have a number of functions you want to copy "AS IS" without changing the relative addressing:

| | |
|----|--------|
| 5 | 1 |
| 6 | 5 |
| 7 | 2 |
| 8 | 3 |
| 9 | =D7+D8 |
| 10 | =D5*D6 |
| 11 | |
| 12 | |
| 13 | |
| 14 | =D7+D8 |
| 15 | =D5*D6 |

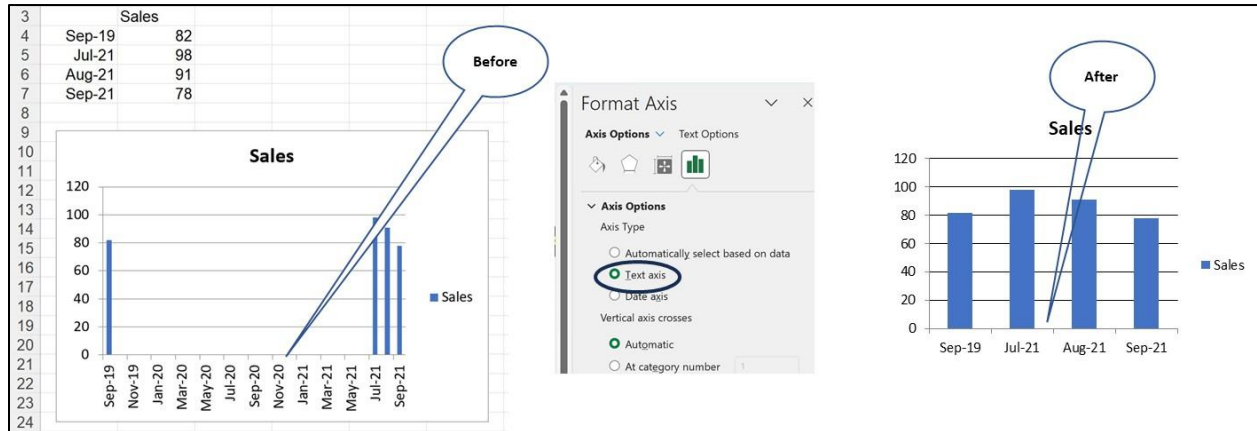


This is one easy way: Use CTRL+~ (or go to the Formulas Ribbon and click on Show Formulas).

5. Gap on the X-Axis

When you use dates in Excel charts you will see a gap between the data points when the dates are far apart.

You can right click on the axis and for Format Axis. Select Text Axis to solve the problem/



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