

Follow us on Youtube for latest Accelerator videos: @TableauAccelerators

TRADING

This Tableau Accelerator allows you to:

- Assess and Improve your performance
- Breakdown your performance to pinpoint drivers
- Identify most impactful traders
- Compare trading volume and trend by Trade Types or Markets
- Simulate volume of potential new revenues by applying new commission policies

Answer key business questions

- Is your trade volume increasing or decreasing?
- What is the trend of trade volume over the last months?
- What are the top trade types by trading volume?
- Are you generating more revenue?
- How is the average commission rate evolving?
- Who are your top clients in terms of revenue, and what commission rate did you apply to them?
- Are you acquiring new clients?

Monitor and improve KPIs

Trading Volume

- **Trade Volume:** Total trade amount (expressed in currency)
- **Number of Trades:** Number of trade transactions

Revenues

- **Total Revenue:** Total revenue amount generated by trade transactions (expressed in currency)
- **Avg Commission Rate:** Average commission rate (expressed in %)

Clients

- **Number of Clients:** Number of active clients (having trade transactions)
- **Nb of New Clients:** Number of new clients acquired (first client position during the analyzed period)
- **Trade Volume per client:** Average trade volume per client (expressed in currency)
- **Revenue per client:** Average revenue amount generated per client (expressed in currency)

Required attributes

- **Date** (*date*): Trade date
- **Trader** (*string*): Name of the Trader
- **Client** (*string*): Name of the Client
- **Sector** (*string*): Area of the economy such as technology, healthcare, energy
- **Trade Type** (*string*): Type of Trades
- **Nb of Transactions** (*numeric*): Nb of the trade transactions
- **Trade Amount** (*numeric*): Amount of the trade
- **Commission Rate** (*numeric*): Commission Rate
- **Trade Revenue** (*numeric*): Amount of the revenue = Trade amount * Commission