

The Best Excel Shortcuts for Financial Modeling

A one-page cheat sheet used by investment banking analysts and private equity professionals.

Navigation & Worksheet Control

Shortcut	Purpose	Real Financial Modeling Use Case
Ctrl + PgUp / Ctrl + PgDn	Move between worksheet tabs	Switch between assumptions, DCF, debt schedule, and output tabs
Alt + H + O + R	Rename worksheet tab	Rename schedules and output tabs quickly
Alt + H + I + S	Insert worksheet	Add new scenario or supporting tabs
Alt + H + D + S	Delete worksheet	Remove unused tabs and schedules
Ctrl + Alt + + / Ctrl + Alt + -	Zoom in / zoom out	Review full model structure or audit formulas
Alt + W + F + F	Freeze panes	Keep headers and years visible while scrolling forecasts

Selection & Structure

Shortcut	Purpose	Real Financial Modeling Use Case
Shift + Space	Select entire row	Format or delete full schedule rows instantly
Ctrl + Space	Select entire column	Adjust formatting or insert forecast columns
Ctrl + Shift + +	Insert rows or columns	Add forecast years or debt tranches
Ctrl + -	Delete rows or columns	Remove unused scenarios or schedules
Alt + Shift + Right Arrow	Group rows or columns	Collapse detailed supporting schedules
Alt + H + 5 / 6	Indent controls	Structure financial statement hierarchy

Formula Building & Auditing

Shortcut	Purpose	Real Financial Modeling Use Case
Alt + =	AutoSum	Create EBITDA totals, debt totals, and subtotals instantly
F4	Lock references	Lock WACC, tax rates, and DCF assumptions
Ctrl + R / Ctrl + D	Copy formulas	Extend operating schedules and forecasts
Ctrl + `	Show formulas	Audit model consistency and identify hardcodes
Ctrl + [Jump to precedents	Trace assumptions and debug formulas

Formatting & Presentation

Shortcut	Purpose	Real Financial Modeling Use Case
Ctrl + Shift + 4	Currency formatting	Format EBITDA, EV, and debt balances
Ctrl + Shift + 5	Percentage formatting	Format margins and discount rates
Ctrl + Shift + 3	Date formatting	Format fiscal years, transaction dates, and timelines
Alt + H + FC	Change font color	Blue assumptions, green links, black formulas
Alt + H + H	Apply fill color	Highlight assumptions and sensitivities
Alt + H + B	Apply borders	Separate schedules and subtotal sections
Alt + H + 0 / 9	Decimal controls	Adjust precision on outputs
Ctrl + Alt + V → T	Paste formatting only	Extend banker formatting consistently
Alt + H + O + I / A	AutoFit	Clean up text and wrapped notes
Ctrl + 1 → Center Across Selection	Alternative to Merge & Center	Create clean headers without breaking functionality

Data & Analysis

Shortcut	Purpose	Real Financial Modeling Use Case
Ctrl + Shift + L	Toggle filters on/off	Filter transaction comps and operational datasets
Alt + Down Arrow	Open active filter dropdown	Quickly filter one specific column
Alt + Down Arrow → C	Clear selected column filter	Remove one filter while preserving the rest of the dataset filters
Alt + A + C	Clear all filters	Reset all filters and return to full dataset view
Alt + N + V	Create Pivot Table	Analyze exports and operational datasets
Alt + H + F + I + S	Fill series	Extend dates, months, quarters, and forecast years