How do I calculate YTD (Year to Date) values in Excel?

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To calculate YTD (Year to Date) values in Excel, follow these steps:

1. Determine the date range for which you want to calculate the YTD values.
2. Create a column or row for the YTD values.
3. In the first cell of the YTD column/row, enter the formula "=SUM(range of cells for the entire year)". This will calculate the total for the entire year.
4. In the second cell, enter the formula "=SUM(range of cells for the current month)". This will calculate the total for the current month.
5. In the third cell, enter the formula "=SUM(previous cell + current month cell)". This will give you the YTD value for the current month.
6. Copy and paste the formula from the third cell to the rest of the cells in the YTD column/row to calculate the YTD values for the rest of the months.
7. Your YTD values will now be automatically calculated and updated as you enter new data for each month.

This method provides a simple and efficient way to calculate YTD values in Excel, allowing you to track your progress and make informed decisions based on your year-to-date performance.

Calculate YTD (Year to Date) Values in Excel

Often you may want to calculate year-to-date values in Excel.

The following examples show how to do so with two different datasets:

A dataset that only includes one unique year.A dataset that includes multiple years.

Let's jump in!

Example 1: Calculate YTD Values for Dataset with One Unique Year

Suppose we have the following dataset that contains information about sales made on various dates during one unique year:

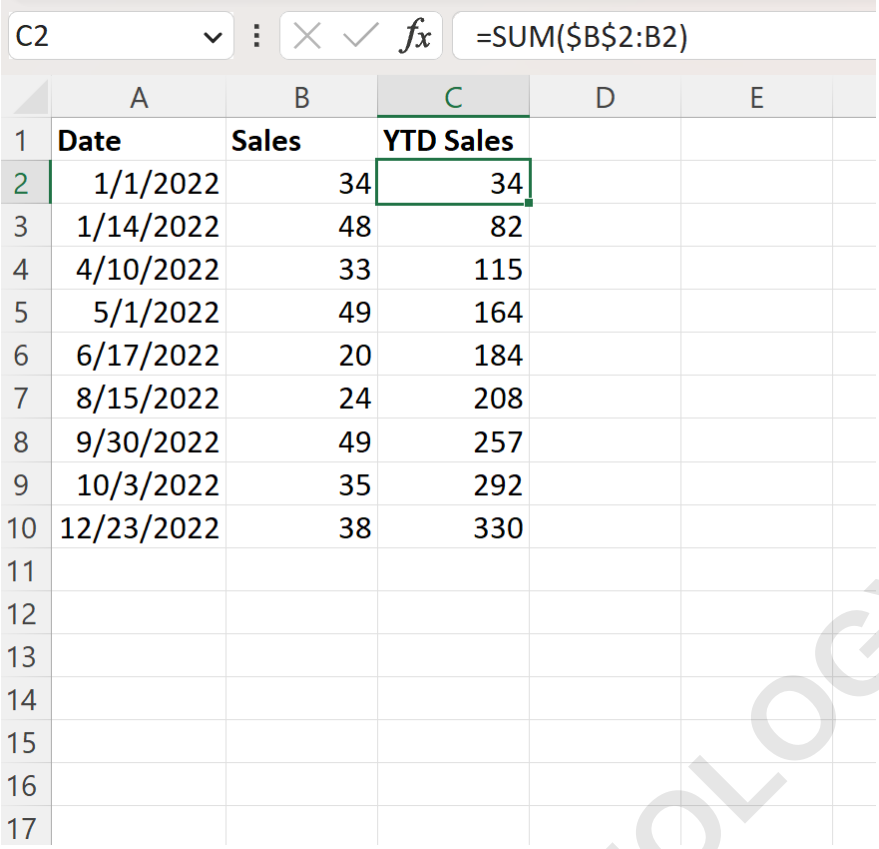
	A	B	C	D	E
1	**Date**	**Sales**			
2	1/1/2022	34			
3	1/14/2022	48			
4	4/10/2022	33			
5	5/1/2022	49			
6	6/17/2022	20			
7	8/15/2022	24			
8	9/30/2022	49			
9	10/3/2022	35			
10	12/23/2022	38			
11					
12					
13					
14					
15					
16					

Suppose we would like to create a new column that contains YTD (year-to-date) sales values.

We can type the following formula into cell C2 to do so:

=SUM(B2:B2)

We can then click and drag this formula down to each remaining cell in column C:



	A	B	C	D	E
1	**Date**	**Sales**	**YTD Sales**		
2	1/1/2022	34	34		
3	1/14/2022	48	82		
4	4/10/2022	33	115		
5	5/1/2022	49	164		
6	6/17/2022	20	184		
7	8/15/2022	24	208		
8	9/30/2022	49	257		
9	10/3/2022	35	292		
10	12/23/2022	38	330		
11					
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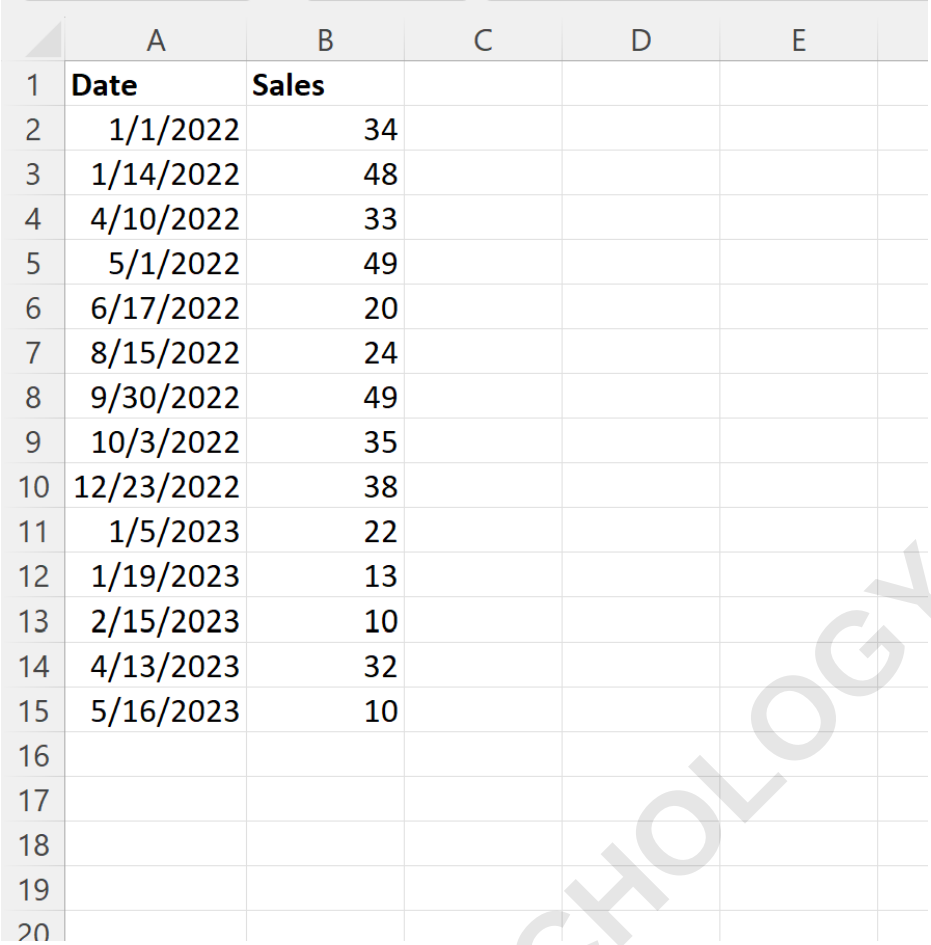
The new YTD Sales column contains the year-to-date sales values.

For example:

The total sales year-to-date by 1/14/2022 was 82.The total sales year-to-date by 4/10/2022 was 115.The total sales year-to-date by 5/1/2022 was 164.

And so on.

Example 2: Calculate YTD Values for Dataset with Multiple Years



	A	B	C	D	E
1	**Date**	**Sales**			
2	1/1/2022	34			
3	1/14/2022	48			
4	4/10/2022	33			
5	5/1/2022	49			
6	6/17/2022	20			
7	8/15/2022	24			
8	9/30/2022	49			
9	10/3/2022	35			
10	12/23/2022	38			
11	1/5/2023	22			
12	1/19/2023	13			
13	2/15/2023	10			
14	4/13/2023	32			
15	5/16/2023	10			
16					
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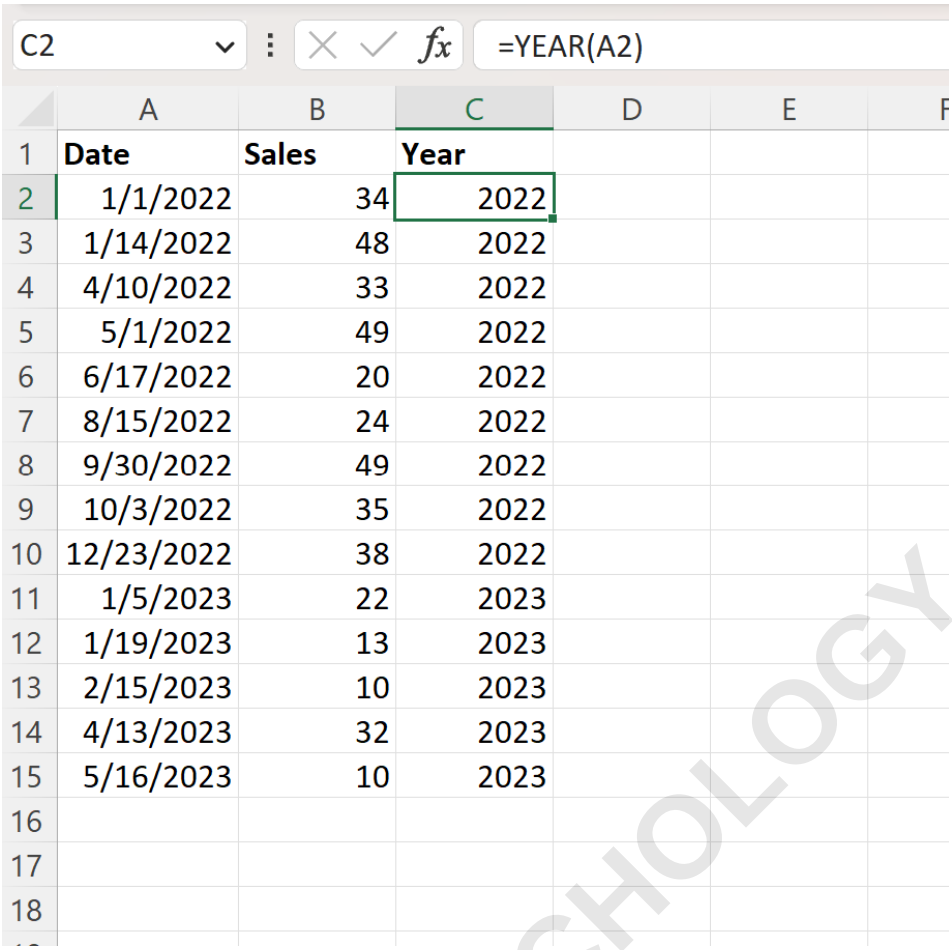
19					
20					

Suppose we would like to create a new column that contains YTD (year-to-date) sales values.

First, we must type the following formula into cell C2 to extract the year from the date:

=YEAR(A2)

We can then click and drag this formula down to each remaining cell in column C:



	A	B	C	D	E
1	**Date**	**Sales**	**Year**		
2	1/1/2022	34	2022		
3	1/14/2022	48	2022		
4	4/10/2022	33	2022		
5	5/1/2022	49	2022		
6	6/17/2022	20	2022		
7	8/15/2022	24	2022		
8	9/30/2022	49	2022		
9	10/3/2022	35	2022		
10	12/23/2022	38	2022		
11	1/5/2023	22	2023		
12	1/19/2023	13	2023		
13	2/15/2023	10	2023		
14	4/13/2023	32	2023		
15	5/16/2023	10	2023		
16					
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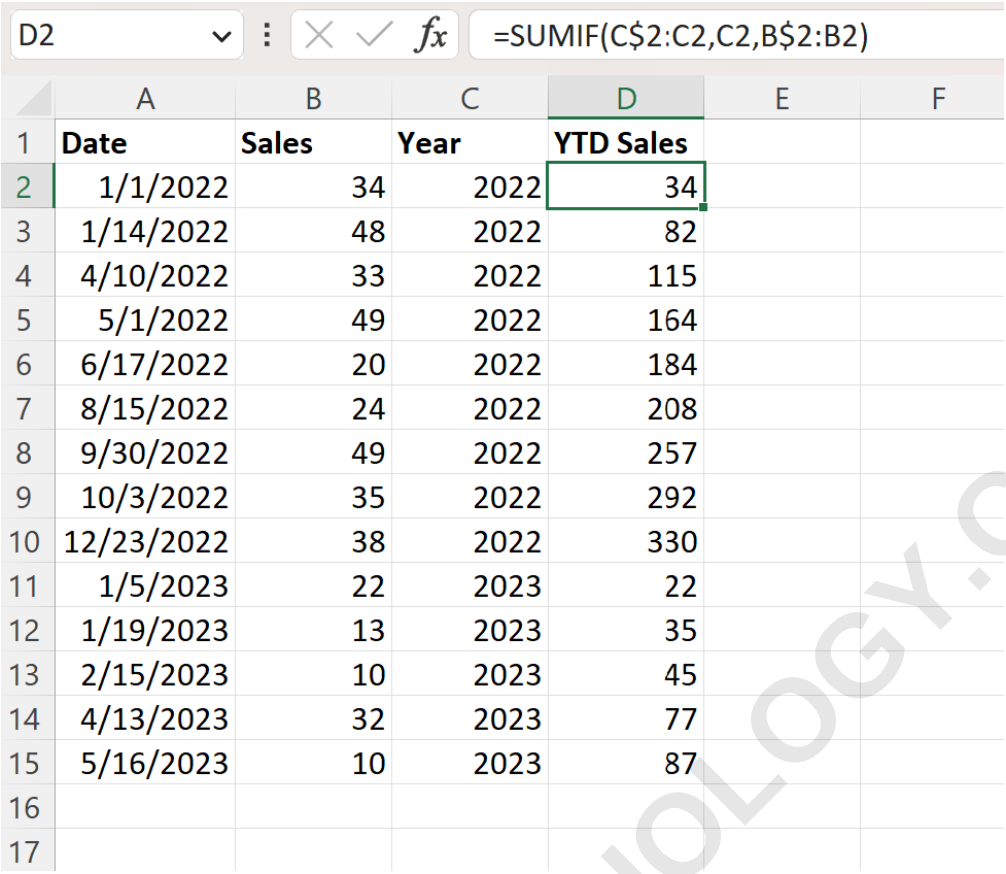
Next, we can type the following formula into cell D2 to calculate the YTD sales values:

=SUMIF(C$2:C2,C2,B$2:B2)

We can then click and drag this formula down to each remaining cell in column C:



D2 =SUMIF(C$2:C2,C2,B$2:B2)

	A	B	C	D	E	F
1	**Date**	**Sales**	**Year**	**YTD Sales**		
2	1/1/2022	34	2022	34		
3	1/14/2022	48	2022	82		
4	4/10/2022	33	2022	115		
5	5/1/2022	49	2022	164		
6	6/17/2022	20	2022	184		
7	8/15/2022	24	2022	208		
8	9/30/2022	49	2022	257		
9	10/3/2022	35	2022	292		
10	12/23/2022	38	2022	330		
11	1/5/2023	22	2023	22		
12	1/19/2023	13	2023	35		
13	2/15/2023	10	2023	45		
14	4/13/2023	32	2023	77		
15	5/16/2023	10	2023	87		
16						
17						

The new YTD Sales column now contains the year-to-date total sales values and it automatically restarts when it detects a new year.

The following tutorials explain how to perform other common operations in Excel: