How to Calculate Cumulative Totals in Power BI – 1 Method at a Time

Method 1: Calculated Column

I want to calculate the running account balance

I’m working with the dataset below

Date	Account	TransactionType	Amount
1-8-2025	A	Deposit	1000
1-8-2025	B	Deposit	500
2-8-2025	A	Withdrawal	-200
2-8-2025	B	Withdrawal	-100
3-8-2025	A	Deposit	500

Let’s use a calculated column and build this from the ground up

Summing the [Amount] column leads to a simple sum:

1000 + 500 – 200 – 100 + 500 = 1700

Not yet what we are looking for

```
1 RunningBalanceColumn = SUM(FactBankAccountMutations[Amount])
```

Date	Account	TransactionType	Amount	RunningBalanceColumn
1-8-2025	A	Deposit	1000	1700
1-8-2025	B	Deposit	500	1700
2-8-2025	A	Withdrawal	-200	1700
2-8-2025	B	Withdrawal	-100	1700
3-8-2025	A	Deposit	500	1700

Let’s use CALCULATE to force context transition
The current row becomes a filter for this table

Still not what we are looking for

```
1 RunningBalanceColumn =
2 CALCULATE(
3     SUM(FactBankAccountMutations[Amount])
4 )
```

Date	Account	TransactionType	Amount	RunningBalanceColumn
1-8-2025	A	Deposit	1000	1000
1-8-2025	B	Deposit	500	500
2-8-2025	A	Withdrawal	-200	-200
2-8-2025	B	Withdrawal	-100	-100
3-8-2025	A	Deposit	500	500

Now let’s use some variables to make stuff more readable and testable and apply a filter on account

We get the final balance for each account. Now we’re cooking; close, but not there yet

```
1  RunningBalanceColumn = // Cumulative Total
2  VAR _CurrentAccount = 'FactBankAccountMutations'[Account]              // Saving the account of the current row
3  VAR _Result =
4      CALCULATE(                                                        // Use CALCULATE to apply filters and force context transition
5          SUM('FactBankAccountMutations'[Amount])
6          , FILTER(
7              'FactBankAccountMutations',
8              'FactBankAccountMutations'[Account] = _CurrentAccount     // I want the sum of the amount of the account of the current row
9          )
10     )
11 RETURN
12
13 _Result
```

Date	Account	TransactionType	Amount	RunningBalanceColumn
1-8-2025	A	Deposit	1000	1300
2-8-2025	A	Withdrawal	-200	1300
3-8-2025	A	Deposit	500	1300
1-8-2025	B	Deposit	500	400
2-8-2025	B	Withdrawal	-100	400

Adding a filter on the [Date] column gives us what we are looking for

```
1  RunningBalanceColumn = // Cumulative Total
2  VAR _CurrentAccount = 'FactBankAccountMutations'[Account]            // Saving the account of the current row
3  VAR _CurrentDate = 'FactBankAccountMutations'[Date]                  // Saving the date of the current row
4  VAR _Result =
5      CALCULATE(                                                       // Use CALCULATE to apply filters and force context transition
6          SUM('FactBankAccountMutations'[Amount])
7          , FILTER(
8              'FactBankAccountMutations',
9              'FactBankAccountMutations'[Account] = _CurrentAccount    // I want the sum of the amount of the account of the current row
10             && 'FactBankAccountMutations'[Date] <= _CurrentDate       // I want the sum of the amount of the account of the date of the current row and all the rows
               that have a date that is smaller or the same
11         )
12     )
13 RETURN
14
15 _Result
```

Date	Account	TransactionType	Amount	RunningBalanceColumn
1-8-2025	A	Deposit	1000	1000
2-8-2025	A	Withdrawal	-200	800
3-8-2025	A	Deposit	500	1300
1-8-2025	B	Deposit	500	500
2-8-2025	B	Withdrawal	-100	400

First method of calculating the cumulative totals

The next method will use a measure and CALCULATE

Do you have anything to add? Did I miss something?

Let me know in the comments!