

Credit Card

Weekly

Status Report



Project Objective



To develop a comprehensive credit card weekly dashboard that provides real-time insights into key performance metrics and trends, enabling stakeholders to monitor and analyze credit card operations effectively.

Operations executed in this project

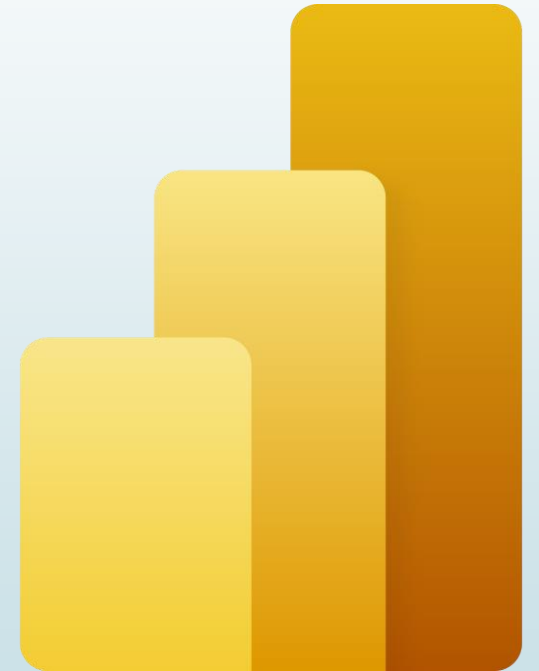
- Prepare CSV Files of all credit card and customer details.
- Created a database named 'creditcarddb' in POSTGRESQL and created required tables with same as our required CSV Files which needs to be imported in our database.
- Once database is created, then it is connected to our Power BI Desktop Application.
- Implement some DAX Queries in Power BI Query editor acc to our needs to create some additional columns with help of existing columns which helps us to create some important tables and graphs in our dashboard.
- Created two different dashboards as mentioned below-
 - > **Credit Card Transaction Report**
 - > **Credit Card Customer Report**



DAX Queries Used in This Projects-

- AgeGroup = SWITCH(
TRUE(),
'public cust_detail'[customer_age] < 30, "20-30",
'public cust_detail'[customer_age] >= 30 && 'public cust_detail'[customer_age] < 40, "30-40",
'public cust_detail'[customer_age] >= 40 && 'public cust_detail'[customer_age] < 50, "40-50",
'public cust_detail'[customer_age] >= 50 && 'public cust_detail'[customer_age] < 60, "50-60",
'public cust_detail'[customer_age] >= 60, "60+",
"unknown"
)
- IncomeGroup = SWITCH(
TRUE(),
'public cust_detail'[income] < 35000, "Low Income",
'public cust_detail'[income] >= 35000 && 'public cust_detail'[income] < 70000, "Med Income",
'public cust_detail'[income] >= 70000, "High Income",
"unknown"
)

- `WeekNum2 = WEEKNUM('public cc_detail'[week_start_date])`
- `Revenue = 'public cc_detail'[annual_fees] + 'public cc_detail'[total_trans_amt] + 'public cc_detail'[interest_earned]`
- `Current_week_revenue = CALCULATE(
SUM('public cc_detail'[Revenue]),
FILTER(
ALL('public cc_detail'),
'public cc_detail'[WeekNum2] = MAX('public cc_detail'[WeekNum2])))`
- `Previous_week_revenue = CALCULATE(
SUM('public cc_detail'[Revenue]),
FILTER(
ALL('public cc_detail'),
'public cc_detail'[WeekNum2] = MAX('public cc_detail'[WeekNum2])-1))`



Project Insights- Week 53 (31st Dec)

WoW change:

- Revenue increased by 28.8%,
- Total Transaction Amt & Count increased by 35.04% & 3.39%
- Customer count increased by 12.80%

Overview YTD:

- Overall revenue is 57M
- Total interest is 8M
- Total transaction amount is 46M
- Male customers are contributing more in revenue 31M, female 26M
- Blue & Silver credit card are contributing to 93% of overall transactions
- TX, NY & CA is contributing to 68%
- Overall Activation rate is 57.5%
- Overall Delinquent rate is 6.06%





GitHub Link-

- https://github.com/Abhinav-Sharma99/Credit_Card_Financial_Dashboard
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