CREDIT CARD

WEEKLY STATUS REPORT

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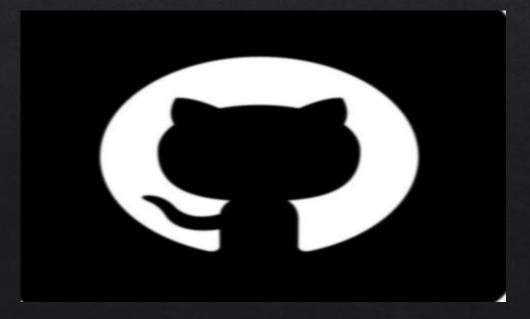5. Export & share project

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.
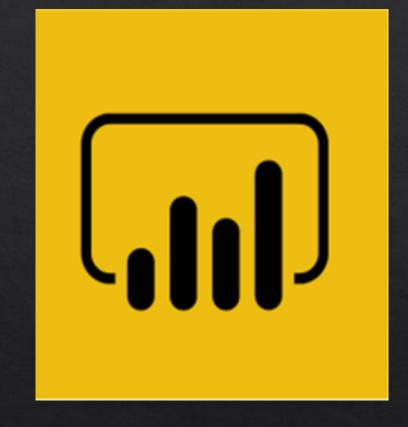
Download Data

GitHub: https://github.com/AjmeraJainAkshit/Credit_Card_Financial_Report
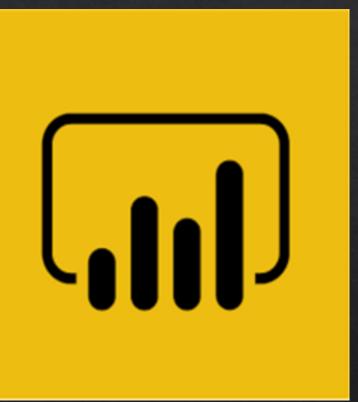
DAX Queries

```
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",
'public cust_detail'[income] >= 35000 && 'public cust_detail'[income] <70000, "Med",
'public cust_detail'[income] >= 70000, "High",
"unknown"
)
```

DAX Queries

week_num2 = 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_Reveneue = CALCULATE(
SUM('public cc_detail'[Revenue]),
FILTER(
ALL('public cc_detail'),
'public cc_detail'[week_num2] = MAX('public cc_detail'[week_num2])))
Previous_week_Reveneue = CALCULATE(
SUM('public cc_detail'[Revenue]),
FILTER(
ALL('public cc_detail'),
'public cc_detail'[week_num2] = MAX('public cc_detail'[week_num2])-1))

Project Insights- Week 52 (24th Dec)

WoW change:

Revenue decreased by 12.83%,

Total Transaction Amt & Count increased by 1.68% & 1.68%

Customer count increased by 25%

Overview YTD:

Overall revenue is 56M

Total interest is 8M

Total transaction amount is 45M

Male customers are contributing more in revenue 30.7M, female 25.5M

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%