**BANK LOAN REPORT QUERY DOCUMENT**

1. **BANK LOAN REPORT | SUMMARY**

**KPI’s:  
Total Loan Applications**

-- Total Loan applications --

SELECT COUNT(ID) AS Total\_Loan\_Applications

FROM bank\_loan\_data;

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**MTD Loan Applications**

-- Month to date loan application --

SELECT count(id) AS MTD\_Total\_Loan\_Application FROM [bank\_loan\_data]

WHERE MONTH(issue\_date) = 12 AND YEAR(issue\_date) = 2021;

A close-up of a loan application

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**PMTD Loan Applications**

--Previous month to date applications--

SELECT COUNT(id) AS PMTD\_Total\_Loan\_Application FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 11;

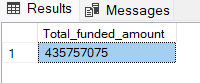
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**Total Funded Loan Amount**

-- Total Funded Amount --

SELECT SUM(loan\_amount) AS Total\_funded\_amount FROM bank\_loan\_data;



**MTD Total Funded Amount**

-- Total Month to date Funded Amount --

SELECT SUM(loan\_amount) AS Total\_funded\_amount FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 12;

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**Previous MTD Total Funded Amount**

-- Previous Month to date Funded Amount --

SELECT SUM(loan\_amount) AS Total\_funded\_amount FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 11;

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**Total Received Loan Amount**

-- Total amount recieved --

SELECT SUM(total\_payment) AS Total\_amount\_recieved

FROM bank\_loan\_data;

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**MTD Total Amount Received**

-- PMTD Total

SELECT SUM(total\_payment) AS Total\_amount\_recieved FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 12;

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**PMTD Total Amount Received**

-- PMTD Total

SELECT SUM(total\_payment) AS Total\_amount\_recieved FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 11;

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**Average Interest Rate**

--Average intrest rate --

SELECT ROUND(AVG(int\_rate),4)\*100 AS Average\_interest\_rate

FROM bank\_loan\_data;

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**Average Interest Rate (Month to date)**

SELECT ROUND(AVG(int\_rate),4)\*100 AS MTD\_Average\_interest\_rate

FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 12;

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**Average Interest Rate (Previous Month to date)**

SELECT ROUND(AVG(int\_rate),4)\*100 AS PMTD\_Average\_interest\_rate

FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 11;

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**Avg DTI**

SELECT ROUND(AVG(dti),4) \* 100 AS avg\_dti

FROM bank\_loan\_data;

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**MTD Avg DTI**

SELECT ROUND(AVG(dti),4) \* 100 AS avg\_dti

FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 12;

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**PMTD Avg DTI**

SELECT ROUND(AVG(dti),4) \* 100 AS avg\_dti

FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 11;

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**GOOD LOAN ISSUED**

**Good Loan Percentage**

--Good Loan Percentage --

SELECT

(COUNT(CASE WHEN loan\_status = 'Fully Paid' OR loan\_status = 'Current' THEN id END) \* 100)

/

Count(id) AS good\_loan\_percentage

FROM bank\_loan\_data;

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**Good Loan Applications**

SELECT COUNT(id) AS Good\_Loan\_Applications FROM bank\_loan\_data

WHERE loan\_status = 'Fully Paid' OR loan\_status = 'Current'

****

**Good Loan Funded Amount**

SELECT SUM(loan\_amount) AS Good\_Loan\_Funded\_amount FROM bank\_loan\_data

WHERE loan\_status = 'Fully Paid' OR loan\_status = 'Current'

**A close up of a box

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**Good Loan Amount Received**

SELECT SUM(total\_payment) AS Good\_Loan\_amount\_received FROM bank\_loan\_data

WHERE loan\_status = 'Fully Paid' OR loan\_status = 'Current'

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**BAD LOAN ISSUED**

**Bad Loan Percentage**

SELECT

    (COUNT(CASE WHEN loan\_status = 'Charged Off' THEN id END) \* 100.0) /

COUNT(id) AS Bad\_Loan\_Percentage

FROM bank\_loan\_data

****

**Bad Loan Applications**

SELECT COUNT(id) AS Bad\_Loan\_Applications FROM bank\_loan\_data

WHERE loan\_status = 'Charged Off'

****

**Bad Loan Funded Amount**

SELECT SUM(loan\_amount) AS Bad\_Loan\_Funded\_amount FROM bank\_loan\_data

WHERE loan\_status = 'Charged Off'

****

**Bad Loan Amount Received**

SELECT SUM(total\_payment) AS Bad\_Loan\_amount\_received FROM bank\_loan\_data

WHERE loan\_status = 'Charged Off'

****

**LOAN STATUS**

SELECT

        loan\_status,

        COUNT(id) AS LoanCount,

        SUM(total\_payment) AS Total\_Amount\_Received,

        SUM(loan\_amount) AS Total\_Funded\_Amount,

        AVG(int\_rate \* 100) AS Interest\_Rate,

        AVG(dti \* 100) AS DTI

    FROM

        bank\_loan\_data

    GROUP BY

        loan\_status

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SELECT

loan\_status,

SUM(total\_payment) AS MTD\_Total\_Amount\_Received,

SUM(loan\_amount) AS MTD\_Total\_Funded\_Amount

FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 12

GROUP BY loan\_status

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1. **BANK LOAN REPORT | OVERVIEW**

**MONTH**

SELECT

MONTH(issue\_date) AS Month\_Munber,

DATENAME(MONTH, issue\_date) AS Month\_name,

COUNT(id) AS Total\_Loan\_Applications,

SUM(loan\_amount) AS Total\_Funded\_Amount,

SUM(total\_payment) AS Total\_Amount\_Received

FROM bank\_loan\_data

GROUP BY MONTH(issue\_date), DATENAME(MONTH, issue\_date)

ORDER BY MONTH(issue\_date)

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**STATE**

SELECT

address\_state AS State,

COUNT(id) AS Total\_Loan\_Applications,

SUM(loan\_amount) AS Total\_Funded\_Amount,

SUM(total\_payment) AS Total\_Amount\_Received

FROM bank\_loan\_data

GROUP BY address\_state

ORDER BY address\_state

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**TERM**

SELECT

term AS Term,

COUNT(id) AS Total\_Loan\_Applications,

SUM(loan\_amount) AS Total\_Funded\_Amount,

SUM(total\_payment) AS Total\_Amount\_Received

FROM bank\_loan\_data

GROUP BY term

ORDER BY term

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**EMPLOYEE LENGTH**

SELECT

emp\_length AS Employee\_Length,

COUNT(id) AS Total\_Loan\_Applications,

SUM(loan\_amount) AS Total\_Funded\_Amount,

SUM(total\_payment) AS Total\_Amount\_Received

FROM bank\_loan\_data

GROUP BY emp\_length

ORDER BY emp\_length

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**PURPOSE**

SELECT

purpose AS PURPOSE,

COUNT(id) AS Total\_Loan\_Applications,

SUM(loan\_amount) AS Total\_Funded\_Amount,

SUM(total\_payment) AS Total\_Amount\_Received

FROM bank\_loan\_data

GROUP BY purpose

ORDER BY purpose

**A screenshot of a table

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**HOME OWNERSHIP**

SELECT

home\_ownership AS Home\_Ownership,

COUNT(id) AS Total\_Loan\_Applications,

SUM(loan\_amount) AS Total\_Funded\_Amount,

SUM(total\_payment) AS Total\_Amount\_Received

FROM bank\_loan\_data

GROUP BY home\_ownership

ORDER BY home\_ownership

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***Note: I have applied multiple Filters on all the dashboards. You can check the results for the filters as well by modifying the query and comparing the results.***

***For e.g***

***See the results when we hit the Grade A in the filters for dashboards.***

*SELECT*

*purpose AS PURPOSE,*

*COUNT(id) AS Total\_Loan\_Applications,*

*SUM(loan\_amount) AS Total\_Funded\_Amount,*

*SUM(total\_payment) AS Total\_Amount\_Received*

*FROM bank\_loan\_data*

*WHERE grade = 'A'*

*GROUP BY purpose*

*ORDER BY purpose*