# CREDIT CARD

WEEKLY STATUS REPORT



#### **Content in this tutorial video**

- 1. Project objective
- 2. Data from SQL
- 3. Data processing & DAX
- 4. Dashboard & insights
- 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/rishabhnmishra/Credit\_Card\_Financial\_Dashboard



or

#### **Google Drive:**

**Click Here** 



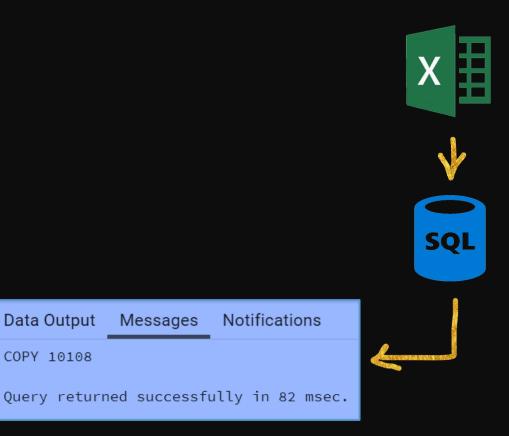
# Import data to SQL database

Data Output

COPY 10108

Messages

- 1. Prepare csv file
- 2. Create tables in SQL
- import csv file into SQL



#### **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 53 (31st Dec)

#### WoW change:

- Revenue increased by 28.8%,
- Total Transaction Amt & Count increased by xx% & xx%
- Customer count increased by xx%

#### **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%



**Note:** You can add more insights

## Add to resume

#### **Credit card financial dashboard using Power BI:**

- Developed an interactive dashboard using transaction and customer data from a SQL database, to provide real-time insights.
- Streamlined data processing & analysis to monitor key performance metrics and trends.
- Shared actionable insights with stakeholders based on dashboard findings to support decision-making processes.

