

# CREDIT CARD

WEEKLY  
STATUS REPORT



# Content in this Project:

1. Project objective 2. Data from CSV 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 analyse credit card operations effectively.

## Download Data

**GitHub:**

[https://github.com/Ankitjaiswal1411/Power-BI-Projects/Credit Card-Customer Report.](https://github.com/Ankitjaiswal1411/Power-BI-Projects/Credit_Card-Customer_Report)



**Or**

**Google Drive: [Click Here](#)**



# Import data to SQL database

1. Prepare csv file 2. Create tables in SQL 3. import csv file into SQL



| Data Output                             | Messages | Notifications |
|---|----------|---------------|
| COPY 10108                              |          |               |
| Query returned successfully in 82 msec. |          |               |

**NOTE:** Find all SQL queries & project data- [SQL%20Query%20-%20Financial%20Dashboard%20Data.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_Revenue = CALCULATE(  
    SUM('public cc_detail'[Revenue]),  
    FILTER(  
        ALL('public cc_detail'),  
        'public cc_detail'[week_num2] = MAX('public cc_detail'[week_num2])))
```

```
Previous_week_Revenue = 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 (31<sup>st</sup> 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.



