Home loans Dashboard

FINANCE REPORT

Project Objective

- **Branch Manager** wants us to help them to create a Dashboard to tract and Analyze their from customer & wants to know for which Product, Total Applied loan amount, Sanctioned amount, Disbursed amount & Total Recovered loan amount & from which Branch location & from which channel.

Project Key points

- Data Analysis.
- Data Collection.
- Data cleaning.
- Data Modeling.
- Data Visualization.
- DAX Queries.
- Calculated Column.
- Key Metrics.
- Dashboard Design.
- Insights & Sharing.

Key metrics:

- Total loan amount: This shows how much amount of loan was applied.
- Total Sanctioned amount: This shows how much amount of loan was Sanctioned.
- Total Disturbed amount: This shows how much amount of loan was Disbursed.
- Total Recovered amount: This shows how much amount of loan was Recovered from customer.

Charts used

- **Line Chart**: it is used here to Analyze the total applied loan amount on yearly, Quarterly & monthly basis & to analyze the trend over time.
- **Funnel chart**: it is used here to Analyze the Total Applied, Sanctioned, Disbursed & Recovered loan amount.
- **Map chart**: it is used here to Analyze Total applied loan amount from which Branch by their longitude & latitude.
- **Donut chart**: it is used here to Analyze the Total applied loan amount from which channels
- **Used AI powered visual: Key Influencers visual** to Analyze what are the Key factors that influences that particular variable, here what factors influences the calculated column [Applied loan amount greater than 10 lacs] it could be Age, it could be salary, gender, branch location.
- **Used AI powered visual Q&A**: This allows users to ask natural language questions and get any answers.
- **Used AI powered visual Decomposition Tree:** this lets user to self survey & Explore the data on various factors & to analyze the Root cause.
- Used **Card** to Analyze different **KPI's** from the data.
- Used **Slicer** to filter for month, year.

Project Insights & Analysis

- Total Applied Loan Amount : 245K
- Total Sanctioned amount 213K, 87% of Total applied loan amount.
- Total Disbursed Amount 196K, 92% of Total Sanctioned amount.
- Total Recovered Amount 104K, 53% of Total Disbursed amount.
- Age 26-32, 33-43 are the factors which leads the total Amount greater than 10 lacs.
- 8482 are the count of customers between Age 26-32 and % Applied loan amount greater than 10 lacs is yes 58.87%
- 4122 are the count of customers between Age 33-43 and % Applied loan amount greater than 10 lacs is yes 58.93%
- 84899 are the count of customers and % Applied loan amount greater than 10 lacs is 42.99% Applied loan through Online Channel.
- 4270 are the count of customers and % Applied loan amount greater than 10 lacs is No is 84.93%
- No of customers 1676 and % Applied loan amount greater than 10 lacs is yes is 39.38% and Branch Name is Bhopal.

Future Scope

- This dashboard provides a glimpse into the vast potential of data-driven decision-making in various things. Beyond the metrics included in this project, there are countless other insights and analytics that can further enhance business growth and success. As technology advances and data analytics capabilities evolve, businesses have the opportunity to leverage data in increasingly sophisticated ways to stay ahead of the competition and achieve sustainable growth.

Calculated Column

- Applied loan amount greater than 10 lacs = if (Customer[Applied Loan Amount in Lacs] > 10, "yes", "No")

DAX Queries

- Total Applied loan amount = Sum(Customer[Applied Loan Amount in Lacs])
- Total recovered Amount = sum('Recovery Data'[Recovery Amount])
- Total disbursed amount = sum('Sanction Data'[Disb Amt in Lacs])
- Total Sanction amount = Sum('Sanction Data'[Sanction Amt in Lacs])

Download Data

- GIT HUB:
- https://github.com/AshishKRaina/PowerBi_dashboad_projects

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THANK YOU