

Credit Card Weekly Report

Weekly Status report

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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 efficiently.



Import Data from SQL

Prepare CSV file



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_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 (31st Dec)

WoW change:

- Revenue increased by 28.8%,
- Total Transaction Amt & Count increased by 1M & 11.6K
- 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%



Keep learning n keep growing

https://github.com/Ashwinsagar1226/Credit_Card_Financial_Report

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