**BANK LOAN REPORT QUERY DOCUMENT**

1. **BANK LOAN REPORT | SUMMARY**

**KPI’s:**

**1. Total Loan Applications**

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



**2. MTD Loan Applications**

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

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



**3. PMTD Loan Applications**  
SELECT COUNT(id) AS PMTD\_Total\_Loan\_Applications FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 11 AND YEAR(issue\_date) = 2021;



**4. Total Funded Amount**

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



**5. MTD Total Funded Amount**

SELECT SUM(loan\_amount) AS MTD\_Total\_Funded\_Amount FROM bank\_loan\_data

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



**6. PMTD Total Funded Amount**

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

WHERE MONTH(issue\_date) = 11 AND YEAR(issue\_date) = 2021;



**7. Total Amount Received**

SELECT SUM(total\_payment) AS Total\_Amount\_Received FROM bank\_loan\_data;



**8. MTD Total Amount Received**

SELECT SUM(total\_payment) AS MTD\_Total\_Amount\_ Received FROM bank\_loan\_data

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



**9. PMTD Total Amount Received**

SELECT SUM(total\_payment) AS PMTDTotal\_Amount\_ Received FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 11 AND YEAR(issue\_date) = 2021;

A close-up of a receipt

Description automatically generated

**10. Average Interest Rate**

SELECT ROUND(AVG(int\_rate), 4) \* 100 AS Avg\_Interest\_Rate FROM bank\_loan\_data;



**11. MTD Average Interest**

SELECT ROUND(AVG(int\_rate), 4) \* 100 AS MTD\_Avg\_Interest\_Rate FROM bank\_loan\_data

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



**12. PMTD Average Interest**

SELECT ROUND(AVG(int\_rate), 4) \* 100 AS PMTD\_Avg\_Interest\_Rate FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 11 AND YEAR(issue\_date) = 2021;



**13. Avg DTI**

SELECT ROUND(AVG(dti), 4) \* 100 AS Avg\_DTI FROM bank\_loan\_data;



**14. MTD Avg DTI**

SELECT ROUND(AVG(dti), 4) \* 100 AS MTD\_Avg\_DTI FROM bank\_loan\_data

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



**15. PMTD Avg DTI**

SELECT ROUND(AVG(dti), 4) \* 100 AS PMTD\_Avg\_DTI FROM bank\_loan\_data

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



**GOOD LOAN ISSUED**

**1. 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;

**A screenshot of a computer

Description automatically generated**

**2. Good Loan Applications**

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

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

****

**3. 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

Description automatically generated**

**4. Good Loan Total Received Amount**

SELECT SUM(total\_payment) AS Good\_Loan\_Total \_Received\_Amount FROM bank\_loan\_data

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

**A screenshot of a computer

Description automatically generated**

**BAD LOAN ISSUED**

**1. Bad Loan Percentage**

SELECT

(COUNT(CASE WHEN loan\_status = 'Charged Off' THEN id END) \* 100) /

COUNT(id) AS Bad\_Loan\_Percentage

FROM bank\_loan\_data;

****

**2. Bad Loan Applications**

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

WHERE loan\_status = 'Charged Off';

****

**3. Bad Loan Funded Amount**

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

WHERE loan\_status = 'Charged Off';

****

**4. Bad Loan Total Received Amount**

SELECT SUM(total\_payment) AS Bad\_Loan\_Total\_Received\_Amount FROM bank\_loan\_data

WHERE loan\_status = 'Charged Off';

****

**LOAN STATUS**

SELECT

loan\_status,

COUNT(id) AS Total\_Loan\_Applications,

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;

**A screenshot of a number

Description automatically generated**

SELECT

loan\_status,

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

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

FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 12

GROUP BY loan\_status;

**A screenshot of a computer

Description automatically generated**

1. **BANK LOAN REPORT | OVERVIEW**

**1. 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); --COUNT(id) DESC

****

**2. 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; --COUNT(id) DESC

****

**3. 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; --COUNT(id) DESC

****

**4. 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; --COUNT(id) DESC;

****

**5. 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; --COUNT(id) DESC

**A screenshot of a table

Description automatically generated**

**6. 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; --COUNT(id) DESC

**A screenshot of a computer

Description automatically generated**

*Note: We 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

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

WHERE grade = 'A' AND address\_state = 'CA'

GROUP BY home\_ownership

ORDER BY home\_ownership; --COUNT(id) DESC