**Fiserv LOAN REPORT QUERY DOCUMENT**

select \* from fiserv\_loan\_data

1. **BANK LOAN REPORT | SUMMARY**

**KPI’s:**

**Total Loan Applications**

SELECT COUNT(id) AS Total\_Applications FROM fiserv\_loan\_data



**MTD Loan Applications**

SELECT COUNT(id) AS Total\_Applications FROM fiserv\_loan\_data

WHERE MONTH(issue\_date) = 12



**PMTD Loan Applications**  
SELECT COUNT(id) AS Total\_Applications FROM fiserv\_loan\_data

WHERE MONTH(issue\_date) = 11



**Total Funded Amount**

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



**MTD Total Funded Amount**

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

WHERE MONTH(issue\_date) = 12



**PMTD Total Funded Amount**

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

WHERE MONTH(issue\_date) = 11



**Total Amount Received**

SELECT SUM(total\_payment) AS Total\_Amount\_Collected FROM fiserv\_loan\_data



**MTD Total Amount Received**

SELECT SUM(total\_payment) AS Total\_Amount\_Collected FROM fiserv\_loan\_data

WHERE MONTH(issue\_date) = 12



**PMTD Total Amount Received**

SELECT SUM(total\_payment) AS Total\_Amount\_Collected FROM fiserv\_loan\_data

WHERE MONTH(issue\_date) = 11



**Average Interest Rate**

SELECT AVG(int\_rate)\*100 AS Avg\_Int\_Rate FROM fiserv\_loan\_data



**MTD Average Interest**

SELECT AVG(int\_rate)\*100 AS MTD\_Avg\_Int\_Rate FROM fiserv\_loan\_data

WHERE MONTH(issue\_date) = 12



**PMTD Average Interest**

SELECT AVG(int\_rate)\*100 AS PMTD\_Avg\_Int\_Rate FROM fiserv\_loan\_data

WHERE MONTH(issue\_date) = 11



**Avg DTI**

SELECT AVG(dti)\*100 AS Avg\_DTI FROM fiserv\_loan\_data



**MTD Avg DTI**

SELECT AVG(dti)\*100 AS MTD\_Avg\_DTI FROM fiserv\_loan\_data

WHERE MONTH(issue\_date) = 12



**PMTD Avg DTI**

SELECT AVG(dti)\*100 AS PMTD\_Avg\_DTI FROM fiserv\_loan\_data

WHERE MONTH(issue\_date) = 11



**GOOD LOAN ISSUED**

**Good Loan Percentage**

SELECT

(COUNT(CASE WHEN loan\_status = 'Fully Paid' OR loan\_status = 'Current' THEN id END) \* 100.0) /

COUNT(id) AS Good\_Loan\_Percentage

FROM fiserv\_loan\_data

****

**Good Loan Applications**

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

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

****

**Good Loan Funded Amount**

SELECT SUM(loan\_amount) AS Good\_Loan\_Funded\_amount FROM fiserv\_loan\_data

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

****

**Good Loan Amount Received**

SELECT SUM(total\_payment) AS Good\_Loan\_amount\_received FROM fiserv\_loan\_data

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

****

**BAD LOAN ISSUED**

**Bad Loan Percentage**

SELECT

(COUNT(CASE WHEN loan\_status = 'Charged Off' THEN id END) \* 100.0) /

COUNT(id) AS Bad\_Loan\_Percentage

FROM fiserv\_loan\_data

****

**Bad Loan Applications**

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

WHERE loan\_status = 'Charged Off'

****

**Bad Loan Funded Amount**

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

WHERE loan\_status = 'Charged Off'

****

**Bad Loan Amount Received**

SELECT SUM(total\_payment) AS Bad\_Loan\_amount\_received FROM fiserv\_loan\_data

WHERE loan\_status = 'Charged Off'

****

**LOAN STATUS**

SELECT

loan\_status,

COUNT(id) AS LoanCount,

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

fiserv\_loan\_data

GROUP BY

loan\_status

****

SELECT

loan\_status,

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

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

FROM fiserv\_loan\_data

WHERE MONTH(issue\_date) = 12

GROUP BY loan\_status

****

1. **BANK LOAN REPORT | OVERVIEW**

**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 fiserv\_loan\_data

GROUP BY MONTH(issue\_date), DATENAME(MONTH, issue\_date)

ORDER BY MONTH(issue\_date)

****

**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 fiserv\_loan\_data

GROUP BY address\_state

ORDER BY address\_state

****

**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 fiserv\_loan\_data

GROUP BY term

ORDER BY term

****

**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 fiserv\_loan\_data

GROUP BY emp\_length

ORDER BY emp\_length

****

**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 fiserv\_loan\_data

GROUP BY purpose

ORDER BY purpose

****

**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 fiserv\_loan\_data

GROUP BY home\_ownership

ORDER BY home\_ownership

****

*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*

*purpose AS PURPOSE,*

*COUNT(id) AS Total\_Loan\_Applications,*

*SUM(loan\_amount) AS Total\_Funded\_Amount,*

*SUM(total\_payment) AS Total\_Amount\_Received*

*FROM fiserv\_loan\_data*

*WHERE grade = 'A'*

*GROUP BY purpose*

*ORDER BY purpose*