

# Bank Loan Data visualisation

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**Data source: Data tutorials**



# Problem Statements

## **Dashboard for Bank Lending Activities and Performance Indicators**

- Provide insights into key loan-related metrics and track changes over time.
- Facilitate data-driven decisions, monitor loan portfolio health, and identify trends to inform strategy.



**What are we going to do?**

- 1.Bank Loan Report Dashboard-Summary**
- 2.Bank Loan Report Dashboard-Overview**
- 3.Bank Loan Report Dashboard-Details**

# Bank Loan Report Dashboard Summary

- This dashboard provides a comprehensive overview of key performance indicators (KPIs) related to the bank's loan portfolio.
- It is organized into several sections to facilitate quick access to essential metrics and performance data.

# Bank Loan Report Dashboard Summary

## 1. Top Summary Metrics:

- Displays the overall metrics, including:
  - **Total Loan Applications:** 38.6K
  - **Total Funded Amount:** \$435.8M
  - **Total Amount Received:** \$473.1M
  - **Average Interest Rate:** 12.0%
  - **Average Debt-to-Income (DTI):** 13.3%
- Each metric also includes **Month-to-Date (MTD)** and **Month-over-Month (MOM)** changes, providing a clear view of performance trends.

# Bank Loan Report Dashboard Summary

## 2. Good Loan vs. Bad Loan Breakdown:

- **Good Loan Issued:**

- Represents loans classified as 'good,' with 86.2% of the applications approved in this category.
- Metrics include:
  - **Applications:** 33.2K
  - **Total Funded Amount:** \$370.2M
  - **Amount Received:** \$435.8M

# Bank Loan Report Dashboard Summary

## 2. Good Loan vs. Bad Loan Breakdown:

- **Bad Loan Issued:**
- Represents loans classified as 'bad.'
- Metrics include:
  - **Applications:** 5.3K
  - **Total Funded Amount:** \$65.5M
  - **Amount Received:** \$37.3M

# Bank Loan Report Dashboard Summary

## 3. Loan Status Breakdown:

- A detailed table categorizes loans based on their current status:
  - **Charged Off:** Total amount received \$37.3M
  - **Current:** Total amount received \$24.2M
  - **Fully Paid:** Total amount received \$411.6M
  - **Grand Total:** Total amount received \$473.1M
- Each status category includes additional metrics like total funded amount, number of applications, and average interest rate.

# Bank Loan Report Dashboard Summary

## 3. Loan Status Breakdown:

- A detailed table categorizes loans based on their current status:
  - **Charged Off:** Total amount received \$37.3M
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- Each status category includes additional metrics like total funded amount, number of applications, and average interest rate.

# **1.Bank Loan Report Dashboard Summary**

# BANK LOAN REPORT|SUMMARY

Summary

Overview

Details

Grade

Verification Status

Purpose

Total Loan Applications

38.6K

38.6K

MOM  
6.91%

Total Funded Amount

\$435.8M

\$54M

MTD  
MOM  
13.0%

Total Amount Received

\$473.1M

\$58.1M

MTD  
MOM  
15.8%

Average Interest Rate

12.0%

12.4%

MTD  
MOM  
3.5%

Average DTI

13.3%

13.7%

MTD  
MOM  
2.7%

Good Loan Issued



Good Loan Applications

33.2K

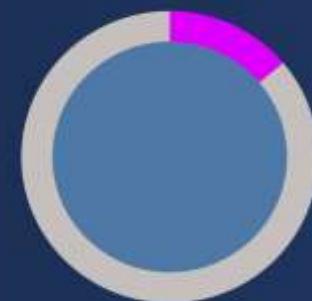
Good Loan Funded

\$370.2M

Good Loan Amount Received

\$435.8M

Bad Loan Issued



Bad Loan Applications

5.3K

Bad Loan Total Funded Amount

\$65.5M

Bad Loan Amount Received

\$37.3M

Loan Status

| Loan Status | Total Amount Received | Total Funded Amount | Total Loan Applications | MTD Total Funded Amount | MTD Total Amount Received | Average Interest Rate | Avg DTI |
|-------------|-----------------------|---------------------|-------------------------|-------------------------|---------------------------|-----------------------|---------|
| Charged Off | \$37.3M               | \$65.5M             | 5,333                   | \$8.7M                  | \$5.3M                    | 13.9%                 | 14.0%   |
| Current     | \$24.2M               | \$18.9M             | 1,098                   | \$3.9M                  | \$4.9M                    | 15.1%                 | 14.7%   |
| Fully Paid  | \$411.6M              | \$351.4M            | 32,145                  | \$41.3M                 | \$47.8M                   | 11.6%                 | 13.2%   |
| Grand Total | \$473.1M              | \$435.8M            | 38,576                  | \$54.0M                 | \$58.1M                   | 12.0%                 | 13.3%   |

## **2.Bank Loan Report Dashboard - Overview**

## 2. Bank Loan Report Dashboard - Overview

- This Overview dashboard provides an in-depth analysis of loan application metrics with multiple perspectives, including time, geography, loan term, employee length, and home ownership status. It helps visualize patterns in loan applications across different factors.

## 2. Bank Loan Report Dashboard - Overview

### 1. Top Summary Metrics:

- Similar to the Summary section, this part displays essential KPIs:
  - **Total Loan Applications:** 38.6K
  - **Total Funded Amount:** \$435.8M
  - **Total Amount Received:** \$473.1M
  - **Average Interest Rate:** 12.0%
  - **Average DTI (Debt-to-Income Ratio):** 13.3%
- Month-to-Date (MTD) and Month-over-Month (MOM) changes are shown for each metric, allowing for quick comparison with recent periods

## 2. Bank Loan Report Dashboard - Overview

### 2. Total Loan Applications by Month:

- A line chart displays the trend of loan applications over the year, illustrating any monthly fluctuations or growth patterns.

### 3. Total Loan Applications by State:

- A map highlights the distribution of loan applications across different U.S. states, providing geographical insights into demand and loan uptake.

### 4. Total Loan Applications by Term:

- A pie chart breaks down the loan applications by term duration:
  - **36 months:** 73.2%
  - **60 months:** 26.8%
- This visualization aids in understanding the preference for shorter versus longer-term loans.

## 2. Bank Loan Report Dashboard - Overview

### 5. Total Loan Applications by Employee Length:

- A bar chart categorizes loan applications by the applicant's employment length, with categories ranging from under 1 year to over 10 years.
- The highest number of applications are from individuals with 10+ years of employment, indicating a potential preference for borrowers with stable job histories.

### 6. Total Loan Applications by Loan Purpose:

- A bar chart shows the distribution of loan applications based on their intended purpose, such as debt consolidation, credit card refinancing, and home improvement.
- Debt consolidation is the most common reason for loan applications.

## 2. Bank Loan Report Dashboard - Overview

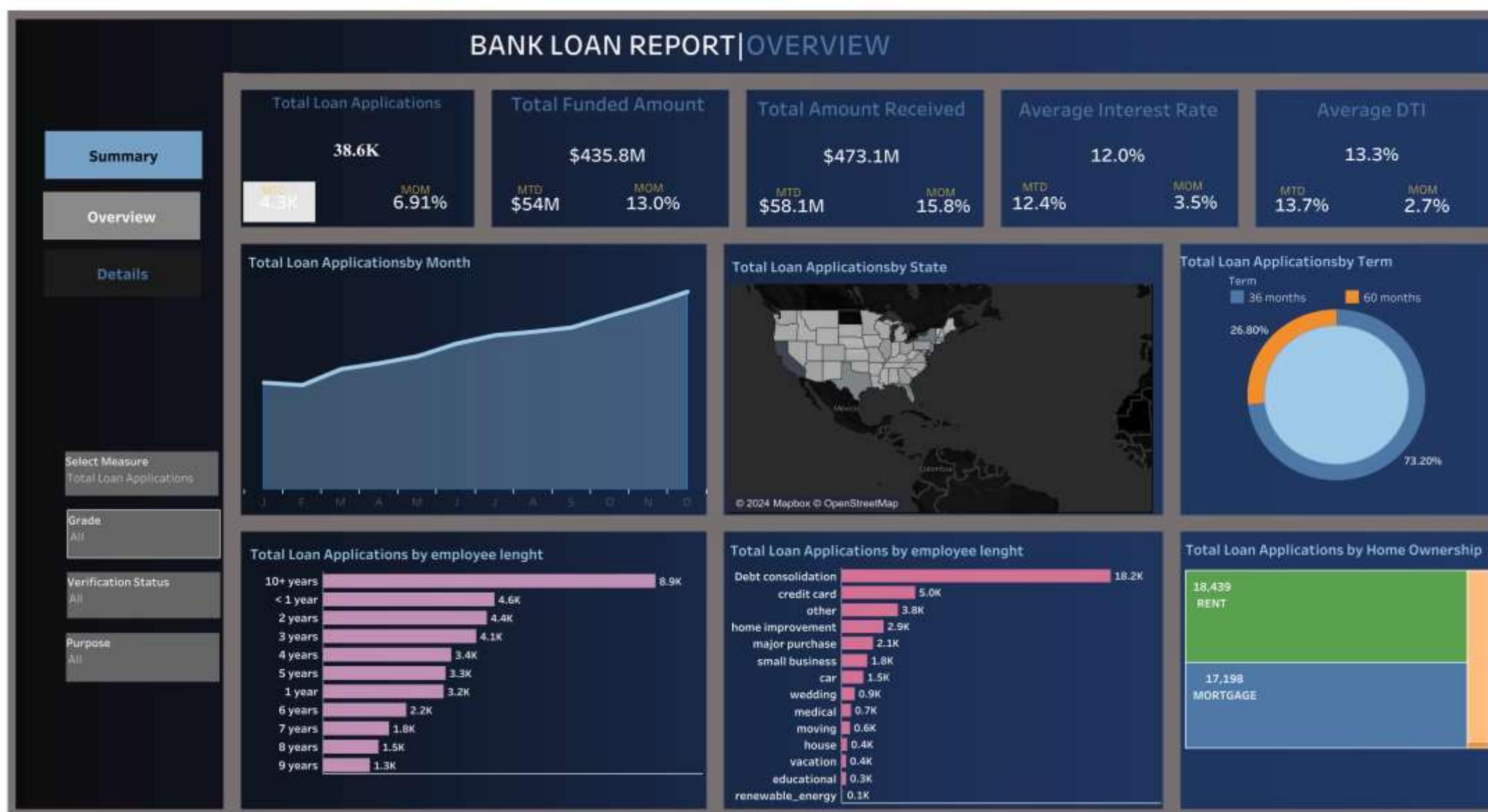
### 7. Total Loan Applications by Home Ownership:

- A stacked bar chart illustrates the breakdown of applications based on home ownership status, including **Rent** (18,439 applications) and **Mortgage** (17,198 applications), which highlights the correlation between housing status and loan applications

## 2.Bank Loan Report Dashboard - Overview

‘This dashboard layout enables stakeholders to quickly gain insights into various factors influencing loan applications, supporting targeted strategies for different customer segments and loan products’.

# 2.Bank Loan Report Dashboard - Overview



### **3.Bank Loan Report Dashboard - Details**

‘The Details section provides a granular view of individual loan applications, displaying comprehensive data for each entry. This detailed information helps with in-depth analysis and auditing, allowing stakeholders to examine specific loan characteristics and performance.’

### **3.Bank Loan Report Dashboard - Details**

#### **1. Top Summary Metrics:**

- Similar to the other sections, this part displays overall metrics such as:
  - **Total Loan Applications:** 38.6K
  - **Total Funded Amount:** \$435.8M
  - **Total Amount Received:** \$473.1M
  - **Average Interest Rate:** 12.0%
  - **Average Debt-to-Income (DTI):** 13.3%
- Month-to-Date (MTD) and Month-over-Month (MOM) changes are shown to provide context.

### **3.Bank Loan Report Dashboard - Details**

#### **2.Detailed Loan Data Table:**

- This table includes the following columns for each loan application:
  - **Id:** Unique identifier for each loan.
  - **Purpose:** Reason for the loan (e.g., credit card, debt consolidation, home improvement).
  - **Home Ownership:** Applicant's housing status (e.g., Mortgage, Rent, Own).
  - **Grade & Sub Grade:** Risk grades assigned to the loan, indicating credit quality.
  - **Issue Date:** Date the loan was issued.
  - **Interest Rate (Int Rate):** The rate applied to the loan.
  - **Loan Amount:** The total funded amount for each loan.
  - **Installment:** Monthly payment required to service the loan.
  - **Total Payment:** Total payment amount over the life of the loan.

### 3.Bank Loan Report Dashboard - Details

#### 3.Filters:

- Filters are available on the left side to refine the data displayed:
  - **Select Measure:** Allows users to switch between different measures, such as Total Loan Applications.
  - **Grade:** Filter loans by credit grade.
  - **Verification Status:** Filter by the verification status of the loan.
  - **Purpose:** Filter loans based on their purpose, such as credit card consolidation or home improvement.

### **3.Bank Loan Report Dashboard - Details**

‘This detailed view supports an in-depth examination of individual loan records, facilitating a better understanding of portfolio composition and aiding in performance monitoring and risk assessment’.

# 3.Bank Loan Report Dashboard - Details



# Conclusion of the Bank Loan Report Dashboard

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## 1. High-Level Overview and Key Performance Indicators (KPIs):

- The dashboard highlights a significant loan portfolio with **38.6K total applications** and a **funded amount of \$435.8M**.
- The **average interest rate** is relatively moderate at **12.0%**, and the **average Debt-to-Income (DTI) ratio** stands at **13.3%**.
- The Month-to-Date (MTD) and Month-over-Month (MOM) metrics indicate steady growth in both loan applications and amounts funded, suggesting a consistent demand and strong lending activity

# Conclusion of the Bank Loan Report Dashboard

## 2. Portfolio Composition and Trends:

- The portfolio is heavily skewed towards **good loans**, with **86.2%** categorized as low-risk. This is a positive indicator of portfolio health, showing a strong preference for funding reliable borrowers. However, a smaller portion of **bad loans (5.3K applications, funded at \$65.5M)** could represent a potential risk if not managed carefully.
- Most loans are for **36-month terms (73.2%)**, indicating a borrower preference for shorter repayment periods, possibly due to manageable debt obligations or a desire for quicker repayment.

# Conclusion of the Bank Loan Report Dashboard

## 3. Loan Purposes and Borrower Demographics:

- **Debt consolidation** is the primary reason for loan applications, followed by **credit card refinancing** and **home improvement**, pointing to a high demand for loans that manage existing debt. This trend could signal consumer financial challenges, with many borrowers looking to reduce or reorganize their debt burdens.
- Applicants with **10+ years of employment** make up the largest share, suggesting that borrowers with stable job histories are a key target demographic. Furthermore, most applicants are either **renters or mortgage holders**, which reflects a mix of middle-class and aspiring homeowners likely to be managing ongoing financial obligations.

# Conclusion of the Bank Loan Report Dashboard

## 4. Individual Loan Analysis and Risk Management:

- The Details section enables close monitoring of individual loan characteristics, such as **interest rates**, **loan grades**, and **payment terms**. The ability to drill down into each loan record allows for targeted risk assessments, especially for loans that are **higher risk** (e.g., loans with higher interest rates or longer terms)

## Final Insights:

The bank's portfolio appears generally healthy, with a strong representation of low-risk loans. However, the high demand for debt-related loans like debt consolidation and credit card refinancing suggests that economic factors may be influencing borrower behavior, possibly indicating higher consumer debt levels.

Moving forward, the bank could focus on monitoring **high-risk loan segments** (e.g., loans with higher interest rates or bad loans) to ensure sustainable performance and mitigate potential default risks.

Additionally, further insights into borrower demographics, such as employment stability and homeownership, can help refine the bank's lending strategies, focusing on reliable borrowers while cautiously managing high-risk segments.

# Dashboard Creation Walkthrough

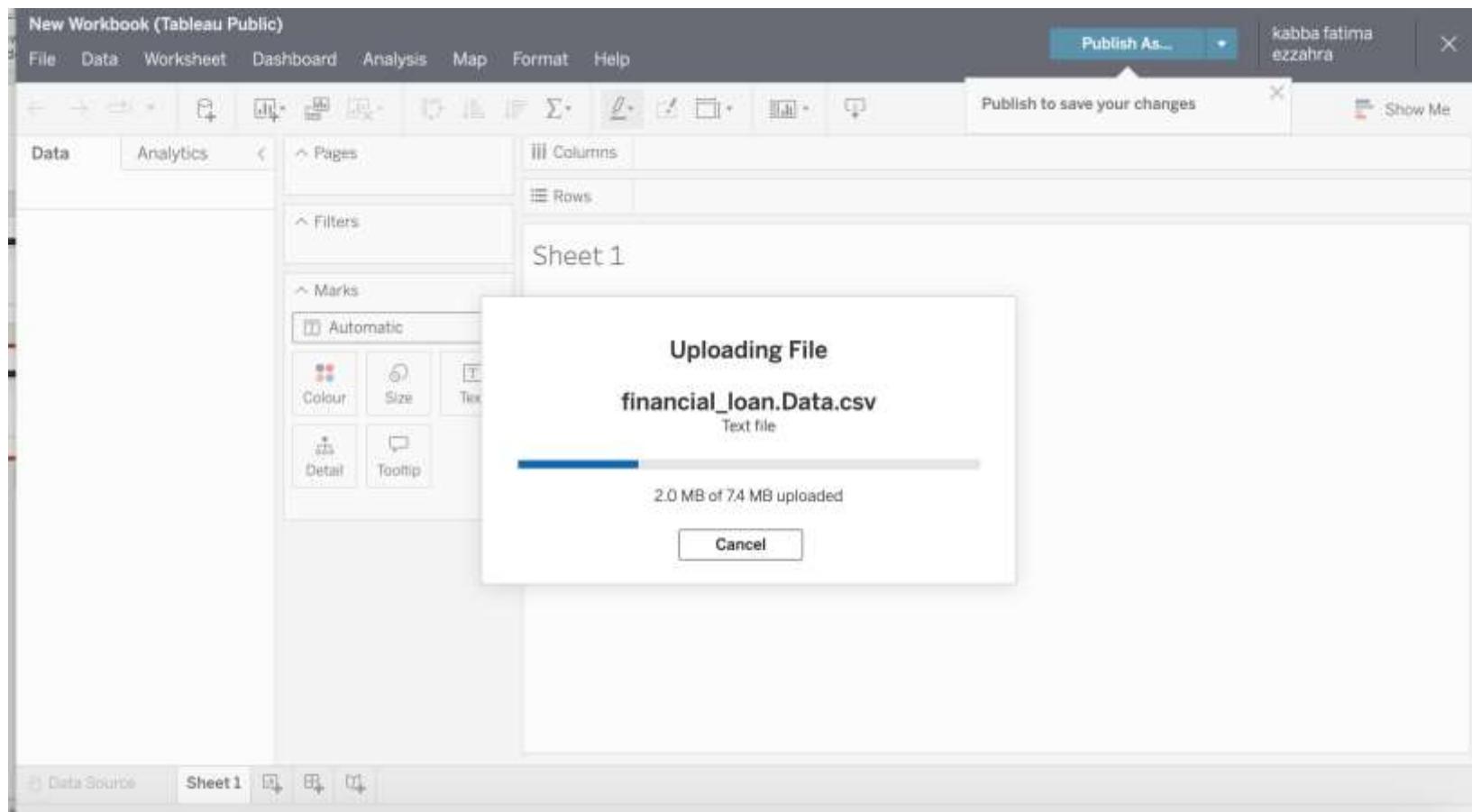
The following slides provide a step-by-step guide, with screenshots, demonstrating the process I followed to create the Bank Loan Report dashboards in Tableau.

# Our Data

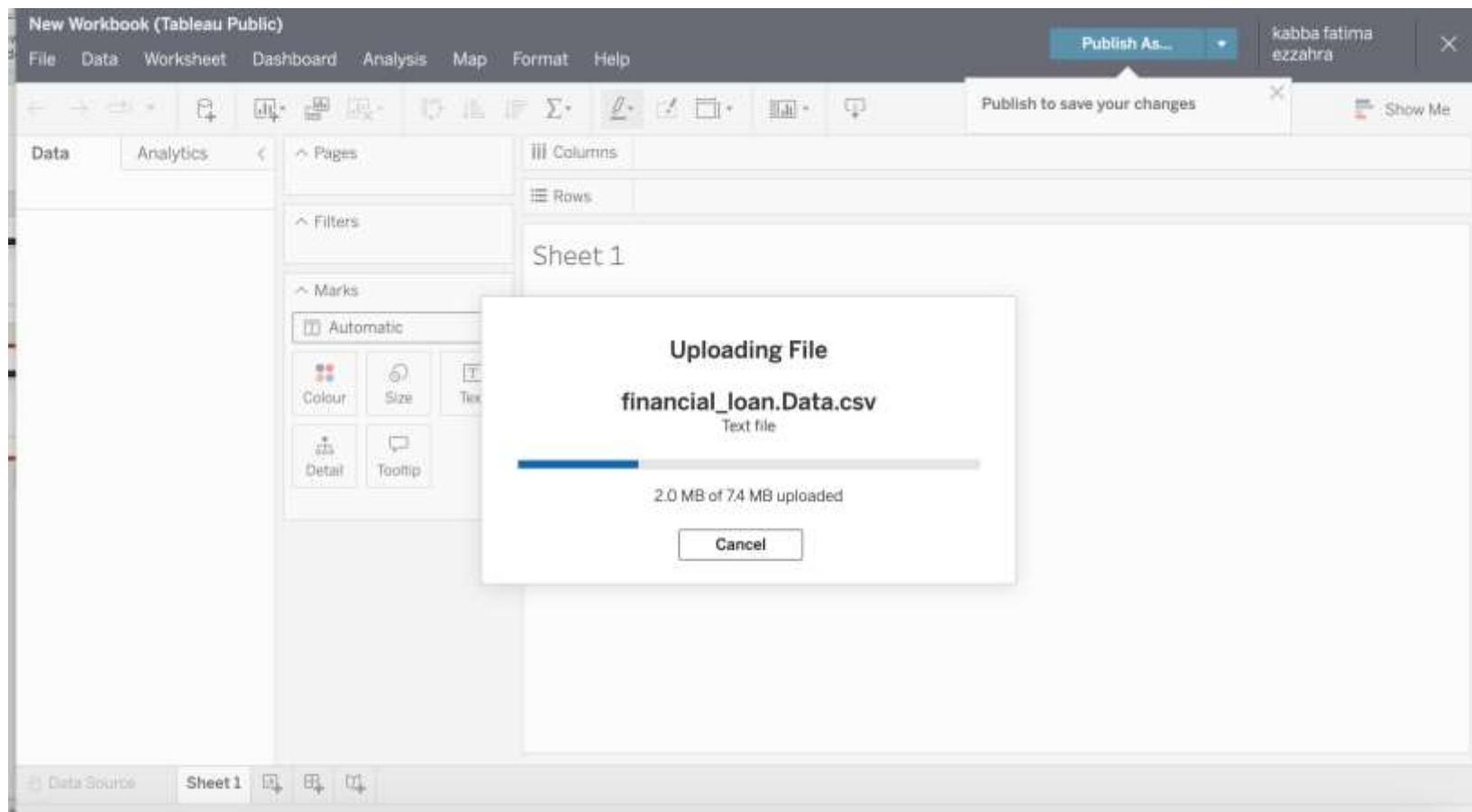
financial\_loan.Data

| A1 | B       | C            | D                       | E         | F               | G         | H          | I             | J          | K           | L           | M          | N       | O         | P    | Q             | R             | S      |        |
|----|---------|--------------|-------------------------|-----------|-----------------|-----------|------------|---------------|------------|-------------|-------------|------------|---------|-----------|------|---------------|---------------|--------|--------|
| 1  | id      | address_stat | application_temp_length | emp_title | grade           | home_owne | issue_date | last_credit_r | last_pymen | loan_status | next_pymen  | member_id  | purpose | sub_grade | term | verification_ | annual_incor  | dti    |        |
| 2  | 1077430 | GA           | INDIVIDUAL              | < 1 year  | Ryder           | C         | RENT       | 11/02/2021    | 13/09/2021 | 13/04/2021  | Charged Off | 13/05/2021 | 1314167 | car       | C4   | 60 months     | Source Verifi | 30000  | 0.01   |
| 3  | 1072053 | CA           | INDIVIDUAL              | 9 years   | MKC Account E   | E         | RENT       | 01/01/2021    | 14/12/2021 | 15/01/2021  | Fully Paid  | 15/02/2021 | 1288686 | car       | E1   | 36 months     | Source Verifi | 48000  | 0.0535 |
| 4  | 1069243 | CA           | INDIVIDUAL              | 4 years   | Chemate Tech C  | C         | RENT       | 05/01/2021    | 12/12/2021 | 09/01/2021  | Charged Off | 09/02/2021 | 1304116 | car       | CS   | 36 months     | Not Verified  | 50000  | 0.2088 |
| 5  | 1041756 | TX           | INDIVIDUAL              | < 1 year  | barnes distri B | B         | MORTGAGE   | 25/02/2021    | 12/12/2021 | 12/03/2021  | Fully Paid  | 12/04/2021 | 1272024 | car       | B2   | 60 months     | Source Verifi | 42000  | 0.054  |
| 6  | 1068350 | IL           | INDIVIDUAL              | 10+ years | J&J Steel Inc A | A         | MORTGAGE   | 01/01/2021    | 14/12/2021 | 15/01/2021  | Fully Paid  | 15/02/2021 | 1302971 | car       | A1   | 36 months     | Verified      | 83000  | 0.0231 |
| 7  | 1062608 | CA           | INDIVIDUAL              | 3 years   | Studio 94 Co C  | C         | RENT       | 17/07/2021    | 16/03/2021 | 12/08/2021  | Fully Paid  | 12/09/2021 | 1294481 | car       | C3   | 36 months     | Not Verified  | 28000  | 0.126  |
| 8  | 1067441 | TX           | INDIVIDUAL              | 10+ years | American Ali C  | C         | MORTGAGE   | 19/11/2021    | 14/06/2021 | 13/12/2021  | Fully Paid  | 13/01/2022 | 1301833 | car       | C2   | 36 months     | Verified      | 94800  | 0.2453 |
| 9  | 1066424 | PA           | INDIVIDUAL              | 10+ years | SCI Mahanoy A   | A         | OWN        | 11/06/2021    | 14/07/2021 | 14/07/2021  | Fully Paid  | 14/08/2021 | 1291243 | car       | A4   | 36 months     | Source Verifi | 59000  | 0.0665 |
| 10 | 1065254 | FL           | INDIVIDUAL              | 10+ years | Tech Data Cc A  | A         | MORTGAGE   | 02/09/2021    | 15/06/2021 | 12/10/2021  | Charged Off | 12/11/2021 | 1299335 | car       | A5   | 36 months     | Verified      | 116400 | 0.0394 |
| 11 | 1064589 | MI           | INDIVIDUAL              | 10+ years | teltow contri B | B         | MORTGAGE   | 09/02/2021    | 16/03/2021 | 16/03/2021  | Fully Paid  | 16/04/2021 | 1298401 | car       | B5   | 60 months     | Not Verified  | 36000  | 0.1773 |
| 12 | 1057766 | TX           | INDIVIDUAL              | 10+ years | Ericsson        | B         | MORTGAGE   | 22/07/2021    | 13/09/2021 | 13/08/2021  | Fully Paid  | 13/09/2021 | 1289131 | car       | B5   | 36 months     | Not Verified  | 75000  | 0.088  |
| 13 | 1062734 | CA           | INDIVIDUAL              | 3 years   | myrvpartspla B  | B         | RENT       | 11/09/2021    | 13/03/2021 | 12/10/2021  | Charged Off | 12/11/2021 | 1295018 | car       | B4   | 36 months     | Not Verified  | 75000  | 0.2288 |
| 14 | 1062654 | CA           | INDIVIDUAL              | 4 years   | AEG LIVE        | B         | RENT       | 11/08/2021    | 13/10/2021 | 13/09/2021  | Fully Paid  | 13/10/2021 | 1294929 | car       | B3   | 36 months     | Not Verified  | 35000  | 0.0401 |
| 15 | 1020855 | CA           | INDIVIDUAL              | 5 years   | henkel corpo B  | B         | RENT       | 11/12/2021    | 14/12/2021 | 14/12/2021  | Fully Paid  | 14/01/2022 | 1249642 | car       | B5   | 36 months     | Not Verified  | 48000  | 0.1533 |
| 16 | 1060945 | IL           | INDIVIDUAL              | 4 years   | AXA Assistar B  | B         | RENT       | 11/10/2021    | 14/12/2021 | 14/12/2021  | Fully Paid  | 14/01/2022 | 1293124 | car       | B4   | 36 months     | Not Verified  | 92000  | 0.106  |
| 17 | 1060995 | RI           | INDIVIDUAL              | < 1 year  | HSA-UWC         | B         | RENT       | 11/12/2021    | 14/02/2021 | 13/10/2021  | Charged Off | 13/11/2021 | 1292578 | car       | B4   | 36 months     | Source Verifi | 60000  | 0.063  |
| 18 | 1046507 | TX           | INDIVIDUAL              | 1 year    | Child's Day     | B         | RENT       | 02/12/2021    | 16/04/2021 | 14/12/2021  | Fully Paid  | 14/01/2022 | 1277552 | car       | B1   | 36 months     | Verified      | 16800  | 0.035  |
| 19 | 1059936 | NY           | INDIVIDUAL              | 4 years   | OEC Freight     | C         | RENT       | 09/10/2021    | 15/09/2021 | 12/11/2021  | Fully Paid  | 12/12/2021 | 1291775 | car       | C2   | 36 months     | Source Verifi | 40000  | 0.1869 |
| 20 | 1059497 | FL           | INDIVIDUAL              | 10+ years | Sandestin Be    | B         | MORTGAGE   | 12/12/2021    | 14/12/2021 | 14/12/2021  | Fully Paid  | 14/01/2022 | 1291322 | car       | B2   | 36 months     | Verified      | 35000  | 0.1392 |
| 21 | 1058060 | MD           | INDIVIDUAL              | 10+ years | D               | D         | OWN        | 02/02/2021    | 16/05/2021 | 15/02/2021  | Fully Paid  | 15/03/2021 | 1289636 | car       | D1   | 36 months     | Not Verified  | 40000  | 0.0957 |
| 22 | 112245  | WI           | INDIVIDUAL              | 6 years   | Norman G. CA    | A         | RENT       | 07/07/2021    | 16/04/2021 | 10/08/2021  | Fully Paid  | 10/09/2021 | 112227  | car       | A2   | 36 months     | Not Verified  | 40000  | 0.0255 |
| 23 | 207910  | FL           | INDIVIDUAL              | < 1 year  | A               | A         | MORTGAGE   | 08/01/2021    | 16/05/2021 | 10/02/2021  | Charged Off | 10/03/2021 | 183496  | car       | A2   | 36 months     | Not Verified  | 120000 | 0.0767 |
| 24 | 65426   | MI           | INDIVIDUAL              | < 1 year  | Infotrieve, In  | B         | MORTGAGE   | 09/08/2021    | 16/05/2021 | 11/06/2021  | Charged Off | 11/07/2021 | 232106  | car       | B1   | 36 months     | Not Verified  | 60000  | 0.1108 |
| 25 | 211723  | MD           | INDIVIDUAL              | 4 years   | self employe    | C         | OWN        | 08/01/2021    | 09/12/2021 | 08/08/2021  | Charged Off | 08/09/2021 | 211606  | car       | C2   | 36 months     | Not Verified  | 72000  | 0.0512 |
| 26 | 662350  | NV           | INDIVIDUAL              | 10+ years | Clark County    | A         | MORTGAGE   | 11/01/2021    | 13/02/2021 | 12/08/2021  | Charged Off | 12/09/2021 | 847024  | car       | A5   | 36 months     | Not Verified  | 70800  | 0.0795 |
| 27 | 1006769 | PA           | INDIVIDUAL              | 6 years   | The Mount S     | A         | MORTGAGE   | 11/11/2021    | 13/11/2021 | 13/06/2021  | Charged Off | 13/07/2021 | 1233120 | car       | A3   | 36 months     | Not Verified  | 80000  | 0.0648 |
| 28 | 405898  | GA           | INDIVIDUAL              | < 1 year  | Blue Ridge DA   | A         | MORTGAGE   | 09/06/2021    | 16/05/2021 | 09/12/2021  | Charged Off | 09/01/2022 | 454145  | car       | A5   | 36 months     | Not Verified  | 36000  | 0.15   |

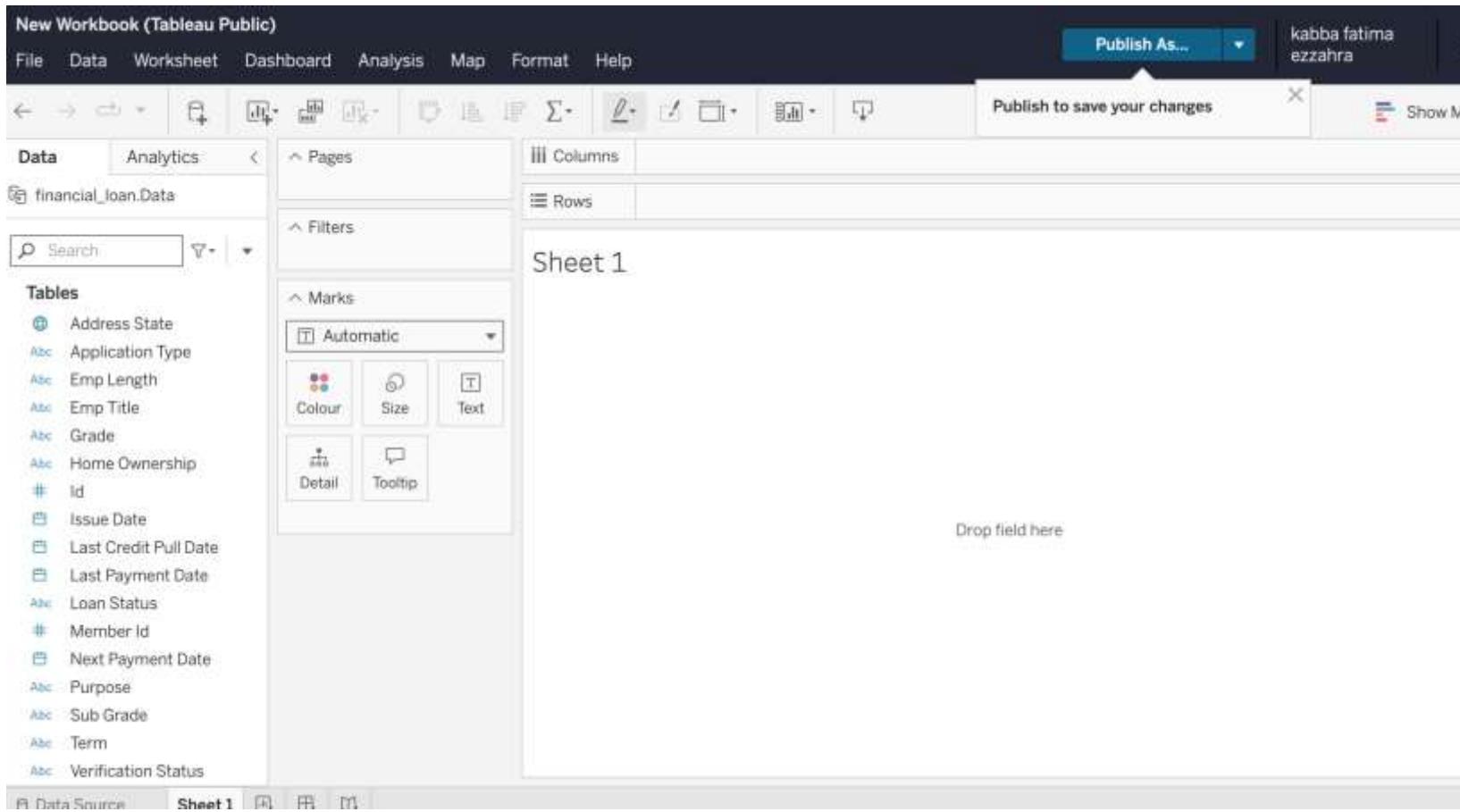
## Uploading the data into tableau Public



## Uploading the data into tableau Public



the data is inserted into tableau Public



## Calculate the Number of Loan Application

The screenshot shows the Tableau Public interface with a "New Workbook (Tableau Public)" title bar. The menu bar includes File, Data, Worksheet, Dashboard, Analysis, Map, Format, and Help. A "Publish As..." button is visible in the top right, along with a user profile for "kabba fatima ezzahra". The main workspace displays a data source named "financial\_loan.Data" and a search bar. On the left, a list of tables is shown, including Address State, Application Type, Emp Length, Emp Title, Grade, Home Ownership, Id, Issue Date, Last Credit Pull Date, Last Payment Date, Loan Status, Member Id, Next Payment Date, Purpose, Sub Grade, Term, and Verification Status. In the center, a "Marks" card is open, showing a calculation dialog titled "Total Loan Applications". The dialog contains the expression "COUNT ([Id])" and a message "The calculation is valid." with "Apply" and "OK" buttons. The overall interface is dark-themed.

## Calculate the Number of Loan Application

The screenshot shows the Tableau Public interface with the following details:

- Top Bar:** Loan (Tableau Public), File, Data, Worksheet, Dashboard, Analysis, Map, Format, Help, Publish, kabba fatima ezzahra, X.
- Toolbars:** Standard toolbar with icons for back, forward, search, etc.
- Left Panel:** Data tab selected, financial\_loan.Data source, Search bar, Tables list (Address State, Application Type, Emp Length, Emp Title, Grade, Home Ownership, Id, Issue Date, Last Credit Pull Date, Last Payment Date, Loan Status, Member Id, Next Payment Date, Purpose, Sub Grade, Term, Verification Status).
- Right Panel:** A large blue rectangular area displays the value "38.6K".
- Bottom Panel:** A floating window titled "AGG(Total Loan App...)" contains a configuration for a calculated field:
  - Automatic** is selected.
  - Decimal Places:** Set to 1.
  - Number (Custom)** is checked.
  - Negative Values:** Set to -1234.
  - Currency (Standard)** is available but not selected.
  - Currency (Custom)** is available but not selected.
  - Percentage** is available but not selected.
  - Scientific** is available but not selected.
  - Custom** is selected.
  - Display Units:** Set to Thousands (K).
  - Prefix** and **Suffix** fields are empty.
  - Include thousands separators** is checked.

# MTD Loan Application calculation

The screenshot shows the Tableau Public interface with a context menu open over a calculated field named "MTD Total Loan Appl". The menu options are:

- Create Calculated Field...
- Create Parameter...
- Group by Folder
- Group by Data Source Table
- Show Hidden Fields
- Expand All
- Collapse All

The "Group by Data Source Table" option is selected, indicated by a checkmark.

Below the menu, there is a placeholder area labeled "Drop field here".

The Tableau interface includes a top navigation bar with File, Data, Worksheet, Dashboard, Analysis, Map, Format, Help, Publish, and user information (kabba fatima ezzahra). On the left, there's a sidebar with Data, Analytics, Pages, Columns, Rows, and a search bar. The main workspace shows a table structure with columns for Pages, Columns, and Rows. The bottom navigation bar includes Data Source, Total Loan Applications, MTD Total Loan Appl, and other icons.

# MTD Loan Application calculation

Loan (Tableau Public)

File Data Worksheet Dashboard Analysis Map Format Help

Publish kabba fatima ezzahra X

Show Me

Data Analytics financial\_loan.Data

Search

Tables

- Address State
- Application Type
- Emp Length
- Emp Title
- Grade
- Home Ownership
- Id
- Issue Date
- Last Credit Pull Date
- Last Payment Date
- Loan Status
- Member Id
- Next Payment Date
- Purpose
- Sub Grade
- Term
- Verification Status

Pages Columns Rows

Marks

Automatic

Colour Size Detail Tool

MTD Total Loan Application

```
COUNT(IF DATEDIFF('month', [Issue Date], [MAX([Issue Date])) >= 0) END)
```

The calculation is valid.

Apply OK

Data Source Total Loan Applications MTD Total Loan Appli

# MTD Loan Application calculation

Loan (Tableau Public)

File Data Worksheet Dashboard Analysis Map Format Help

Publish kabba fatima ezzahra X

Data Analytics < financial\_loan.Data

Search

- + ID
- Issue Date
- Last Credit Pull Date
- Last Payment Date
- Loan Status
- Member Id
- Next Payment Date
- Purpose
- Sub Grade
- Term
- Verification Status
- Measure Names
- # Annual Income
- # Dti
- # Installment
- # Int Rate
- # Loan Amount
- # MTD Total Loan Appli...
- + Total Applications

Automatic

Decimal Places: 1

Number (Standard)

✓ Number (Custom)

Currency (Standard)

Currency (Custom)

Percentage

Scientific

Custom

Negative Values: -1234

Display Units: Thousands (K)

Prefix:

Suffix:

Include thousands separators

AGG(MTD Total Loa...)

MTD Total Loan Appli

4.3K

Data Source Total Loan Applications MTD Total Loan Appli

This screenshot shows the Tableau Public interface for a dashboard titled 'MTD Loan Application calculation'. The top navigation bar includes File, Data, Worksheet, Dashboard, Analysis, Map, Format, and Help. A user profile 'kabba fatima ezzahra' is visible in the top right. The left sidebar lists various data fields such as ID, Issue Date, and Loan Status. A floating window displays the configuration for a calculated field named 'AGG(MTD Total Loa...)'. The 'Number (Custom)' tab is selected, with settings for Decimal Places (1), Negative Values (-1234), Display Units (Thousands (K)), and Include thousands separators (checked). The main visualization area shows a single value '4.3K'.

# MTD Loan Application calculation

Loan (Tableau Public)

File Data Worksheet Dashboard Analysis Map Format Help

Publish kabba fatima ezzahra X

Show Me

Data Analytics < financial\_loan.Data

Search ▾

- # ID
- Issue Date
- Last Credit Pull Date
- Last Payment Date
- Abc Loan Status
- # Member Id
- Next Payment Date
- Abc Purpose
- Abc Sub Grade
- Abc Term
- Abc Verification Status
- Abc Measure Names
- # Annual Income
- # Dti
- # Installment
- # Int Rate
- # Loan Amount
- # MTD Total Loan Applica...
- Total A...

Pages: Columns Rows

Marks: Automatic

Colour Size Text Detail Tooltip

AGG(MTD Total Loa...)

MTD Total Loan Appli

4.3K

Data Source: Total Loan Applications MTD Total Loan Appli

The screenshot shows the Tableau Public interface with a dashboard titled "MTD Total Loan Application calculation". The dashboard displays a single large blue rectangular area containing the text "4.3K". In the top-left corner of this area, there is a small green button labeled "AGG(MTD Total Loa...)". The interface includes a sidebar with various data fields like "Issue Date", "Last Credit Pull Date", and "Annual Income", and a marks card with options for "Automatic" and "Text". The top navigation bar shows "File", "Data", "Worksheet", "Dashboard", "Analysis", "Map", "Format", and "Help". The top right corner has a "Publish" button and user information "kabba fatima ezzahra". The bottom navigation bar includes "Data Source", "Total Loan Applications", and the active dashboard tab "MTD Total Loan Appli".

# MTD Loan Application calculation

The screenshot shows the Tableau Public interface with a data source named "financial\_loan.Data". The data pane lists various fields such as Id, Issue Date, Last Credit Pull Date, Last Payment Date, Loan Status, Member Id, Next Payment Date, Purpose, Sub Grade, Term, Verification Status, Measure Names, Annual Income, Dti, Installment, Int Rate, Loan Amount, and MTD Total Loan Application. A calculated field dialog box is open, titled "PMTD Total Loan Application", containing the following formula:

```
COUNT(IF DATEDIFF('month', [Issue Date], MAX([Issue Date])) <= 1, [Id])
```

The dialog also displays the message "The calculation is valid." with "Apply" and "OK" buttons.

# MTD Loan Application calculation

Loan (Tableau Public)

File Data Worksheet Dashboard Analysis Map Format Help

Publish kabba fatima ezzahra X

Data Analytics < financial\_loan.Data

Search ▾

- # Id
- Issue Date
- Last Credit Pull Date
- Last Payment Date
- Loan Status
- Member Id
- Next Payment Date
- Purpose
- Sub Grade
- Term
- Verification Status
- Measure Names
- # Annual Income
- # Dti
- # Installment
- # Int Rate
- # Loan Amount
- # MTD Total Loan Applica...

Pages Columns Rows

MOM Total Appli

( [MTD Total Loan Application]- [PMTD Total Loan Application] ) / [PMTD Total Loan Application]

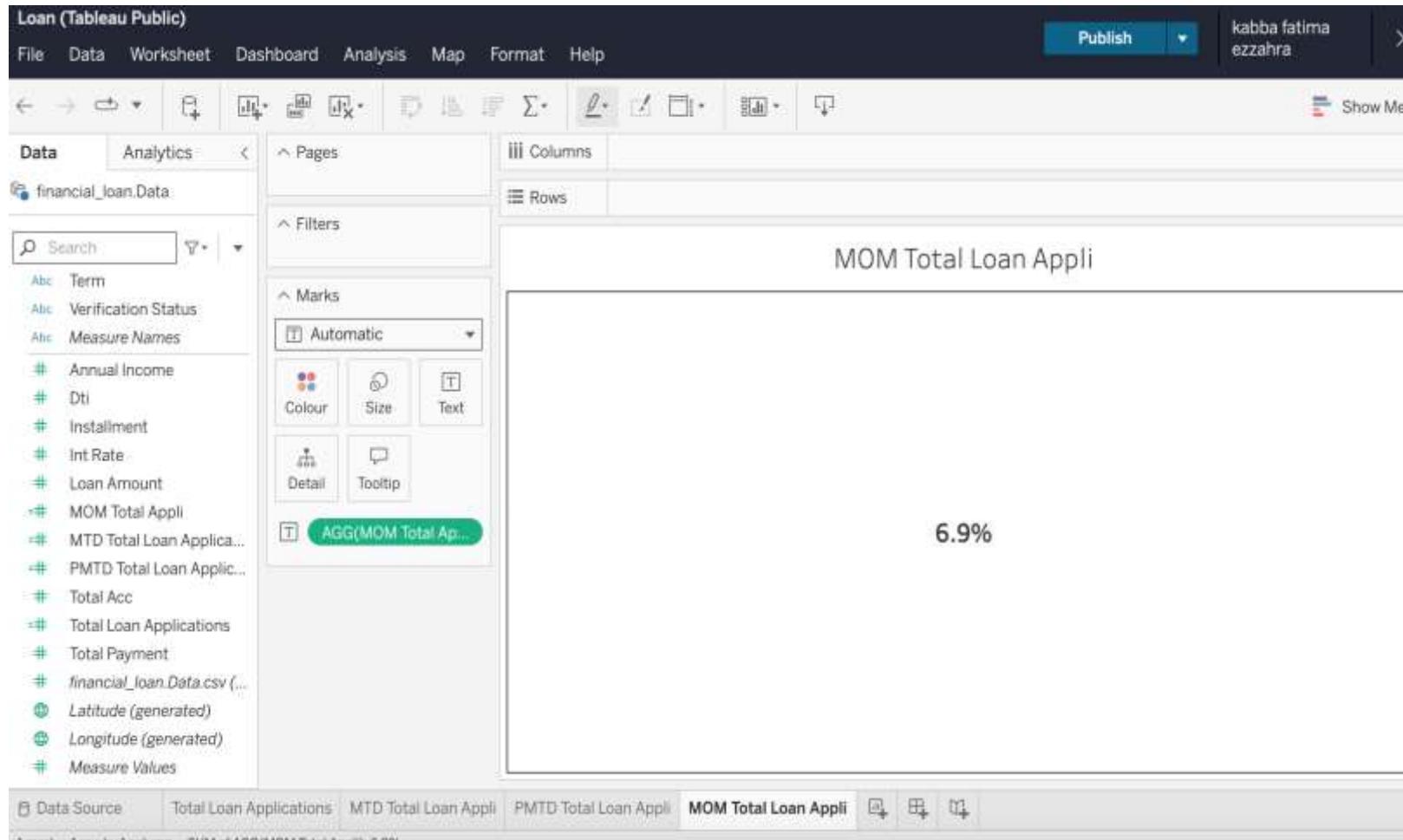
The calculation is valid.

Colour Size Detail Tool

Apply OK

This screenshot shows the Tableau Public interface with a data source named 'financial\_loan.Data'. The 'Marks' shelf is open, displaying a calculated field named 'MOM Total Appli'. The formula for this field is:  $([\text{MTD Total Loan Application}] - [\text{PMTD Total Loan Application}]) / [\text{PMTD Total Loan Application}]$ . A blue circle highlights the division operator (/). The message 'The calculation is valid.' is displayed below the formula. The 'OK' button is visible at the bottom right of the dialog.

# MTD Loan Application calculation



# Total Funded Amount

Loan (Tableau Public)

File Data Worksheet Dashboard Analysis Map Format Help

Publish kabba fatima ezzahra X

Show Me

Data Analytics < financial\_loan.Data

Search ▾

Term  
Verification Status  
Measure Names  
Annual Income  
Dti  
Installment  
Int Rate  
Loan Amount  
MOM Total Appli  
MTD Total Loan Appli...  
PMTD Total Loan Appli...  
Total Acc  
Total Funded Amount  
Total Loan Applications  
Total Payment  
financial\_loan.Data.csv (...)  
Latitude (generated)  
Longitude (generated)

Pages Columns Rows

Marks Automatic Colour Size Detail Tool

Total Funded Amount

SUM([Loan Amount])

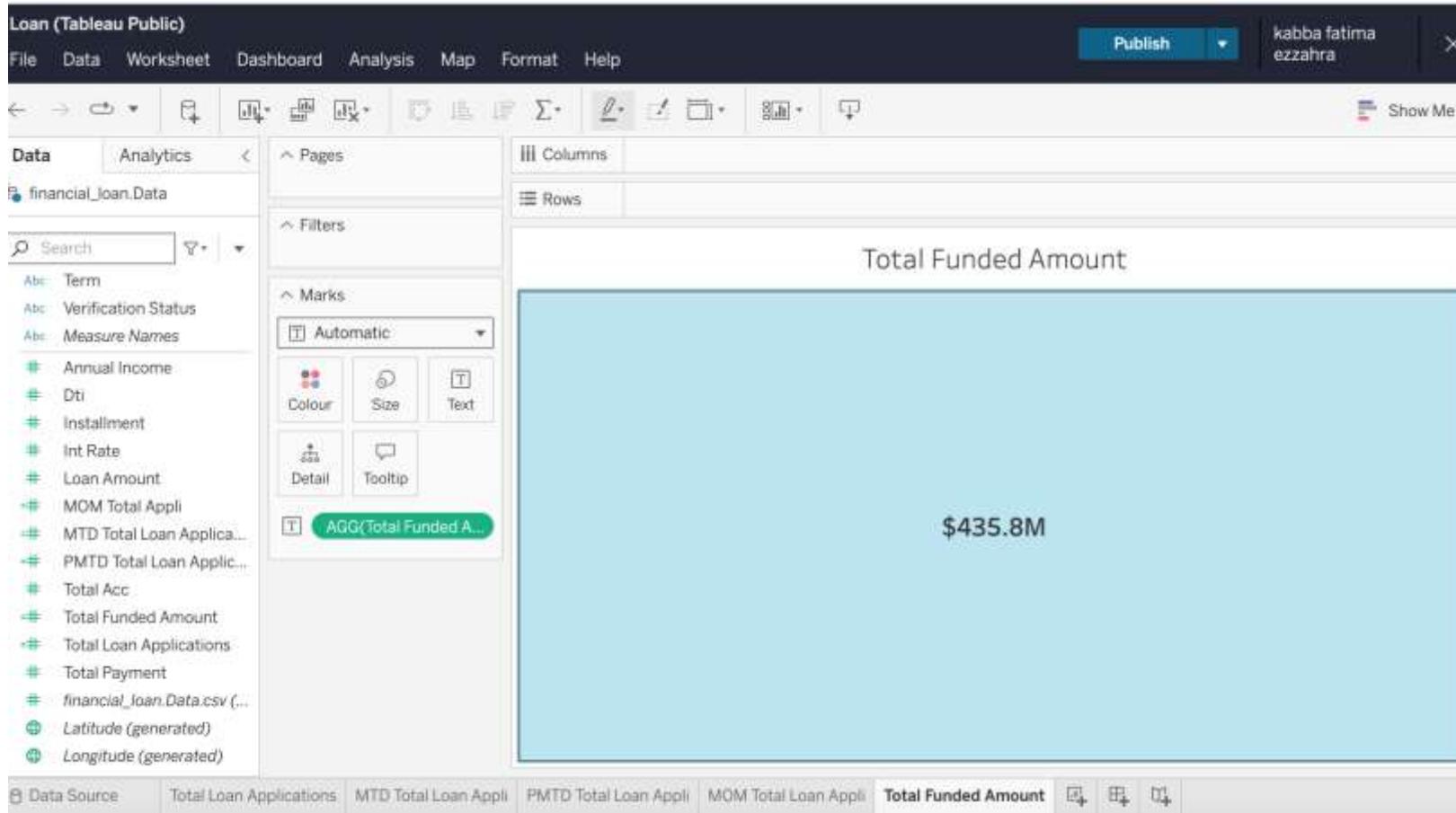
The calculation is valid.

Apply OK

Data Source Total Loan Applications MTD Total Loan Appli PMTD Total Loan Appli MOM Total Loan Appli Total Funded Amount

This screenshot shows the Tableau Public interface with a calculated field dialog open. The dialog title is 'Total Funded Amount' and contains the expression 'SUM([Loan Amount])'. Below the expression, a message says 'The calculation is valid.' There are 'Apply' and 'OK' buttons at the bottom right of the dialog. The background shows the Tableau interface with various data sources and a worksheet area.

# MTD Loan Application calculation



# MTD Total Funded Amount

Loan (Tableau Public)

File Data Worksheet Dashboard Analysis Map Format Help

Publish kabba fatima ezzahra X

Show Me

Data Analytics <

financial\_loan.Data

Search ▾

- Last Payment Date
- Loan Status
- Member Id
- Next Payment Date
- Purpose
- Sub Grade
- Term
- Verification Status
- Measure Names:
- Annual Income
- Dti
- Installment
- Int Rate
- Loan Amount
- MOM Total Appli.
- MTD Total Loan Appli... MTD Total Loan Appli...
- PMTD Total Loan Appli...

Pages Columns

Rows

MTD Total Funded Amount

```
SUM(IF DATEDIFF('month', [Issue Date], {MAX([Issue Date])}) <= 0, [Loan Amount], 0)
```

The calculation is valid.

Apply OK

|             |                         |                      |                       |                      |                     |                         |     |
|-------------|-------------------------|----------------------|-----------------------|----------------------|---------------------|-------------------------|-----|
| Data Source | Total Loan Applications | MTD Total Loan Appli | PMTD Total Loan Appli | MOM Total Loan Appli | Total Funded Amount | MTD Total Funded Amount | + - |
|-------------|-------------------------|----------------------|-----------------------|----------------------|---------------------|-------------------------|-----|

# MTD Loan Application calculation

Loan (Tableau Public)

File Data Worksheet Dashboard Analysis Map Format Help

Publish kabba fatima ezzahra X

Data Analytics < ^ Pages Columns Rows

financial\_loan.Data

Search ▾

Last Payment Date  
Loan Status  
Member Id  
Next Payment Date  
Purpose  
Sub Grade  
Term  
Verification Status  
Measure Names

Annual Income  
Dti  
Installment  
Int Rate  
Loan Amount  
MOM Total Appli  
MTD Total Funded Amo...  
MTD Total Loan Appli...  
PMTD Total Loan Appli...

MTD Total Funded Amount

Colour Size Text Detail Tooltip AGG(MTD Total Fun... \$54.0M MTD Total Funded Amount: \$54.0M

Data Source: Total Loan Applications MTD Total Loan Appli PMTD Total Loan Appli MDM Total Loan Appli Total Funded Amount MTD Total Funded Amount

This screenshot shows a Tableau Public dashboard titled 'MTD Total Funded Amount'. The dashboard displays a single data point with a value of '\$54.0M'. A tooltip is visible, confirming the value as 'MTD Total Funded Amount: \$54.0M'. The interface includes a sidebar with various data fields like 'Last Payment Date' and 'Loan Status', and a bottom navigation bar with tabs for different data sources.

# MOM funded Amount

Loan (Tableau Public)

File Data Worksheet Dashboard Analysis Map Format Help

Publish kabba fatima ezzahra

Data Analytics financial\_loan.Data

Search

Loan Status Member Id Next Payment Date Purpose Sub Grade Term Verification Status Measure Names Annual Income Dti Installment Int Rate Loan Amount MOM Total Appl MTD Total Funded Amo... MTD Total Loan Appl... PMTD Total Funded Am... PMTD Total Loan Appl...

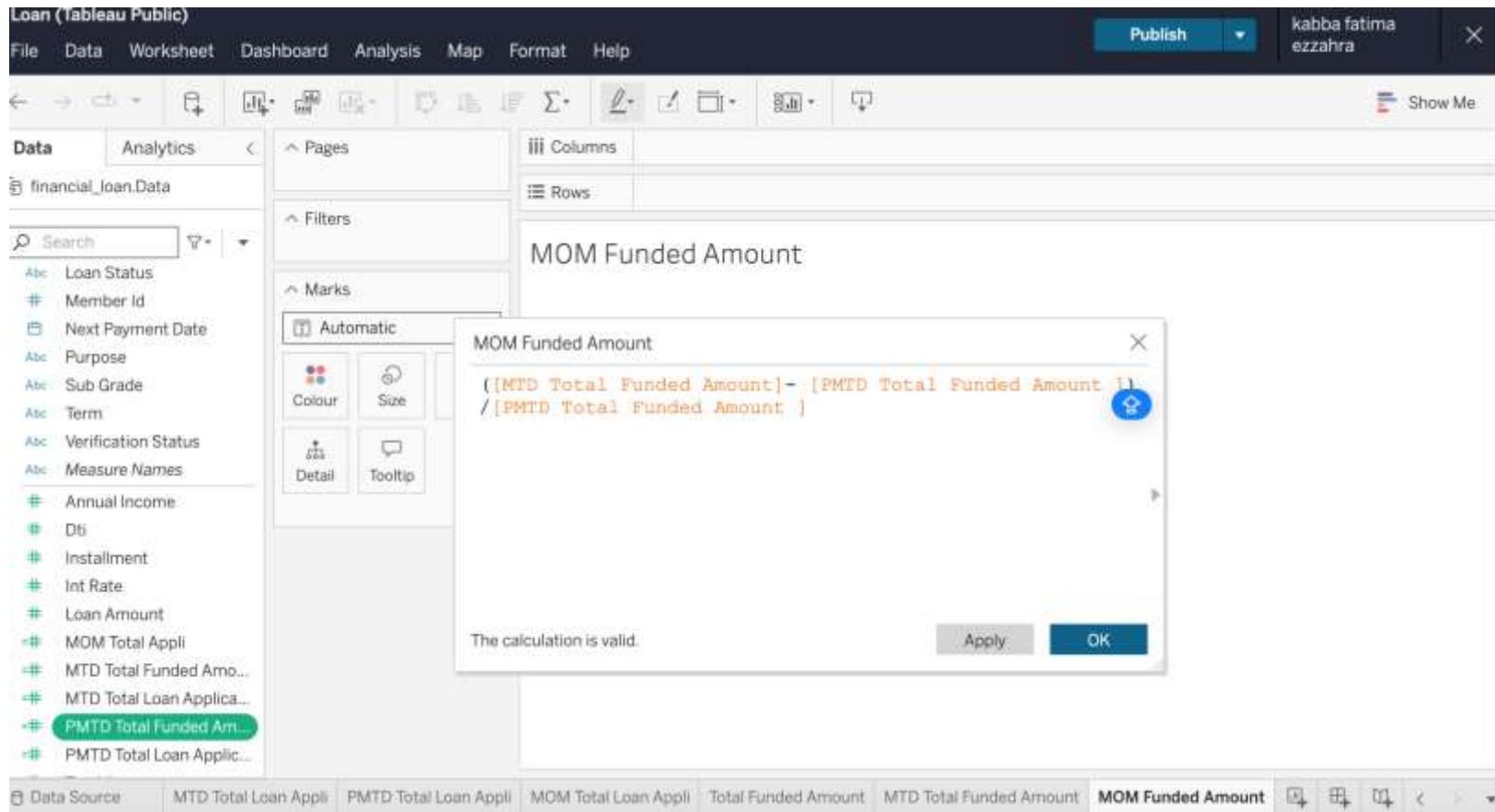
MOM Funded Amount

$$\frac{([MTD\ Total\ Funded\ Amount] - [PMTD\ Total\ Funded\ Amount])}{[PMTD\ Total\ Funded\ Amount]}$$

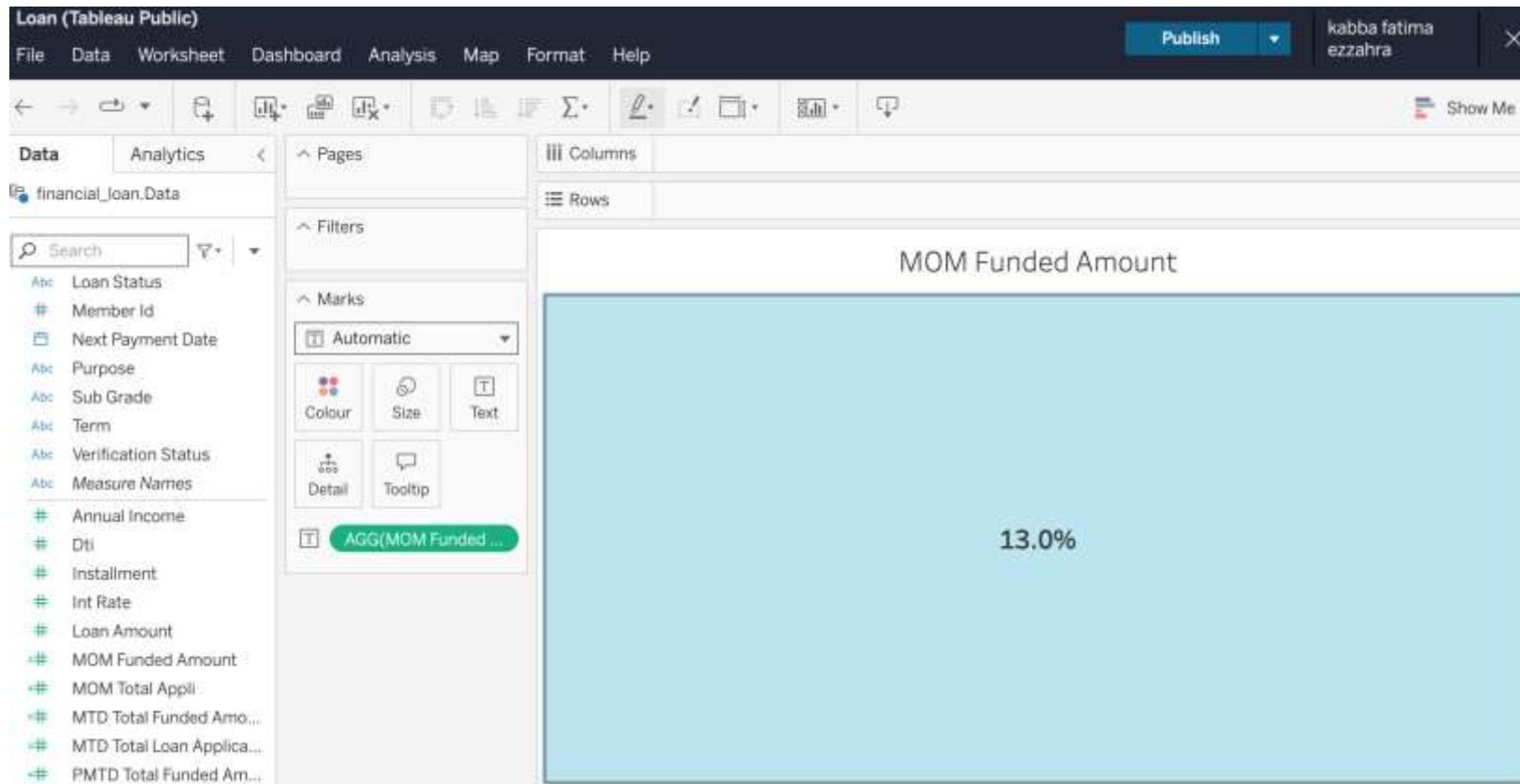
The calculation is valid.

Apply OK

Data Source MTD Total Loan Appl PMTD Total Loan Appl MOM Total Loan Appl Total Funded Amount MTD Total Funded Amount MOM Funded Amount



# MOM Funded Amount



# Total Amount received

Loan (Tableau Public)

File Data Worksheet Dashboard Analysis Map Format Help

Publish kabba fatima ezzahra X

Data Analytics < ^ Pages Columns Rows

Financial\_loan.Data

Search ▾

# Id  
Issue Date  
Last Credit Pull Date  
Last Payment Date  
Loan Status  
Member Id  
Next Payment Date  
Purpose  
Sub Grade  
Term  
Verification Status  
Measure Names

# Annual Income  
Dti  
Installment  
Int Rate  
Loan Amount  
MOM Funded Amount

Total Amount Received

[Total Payment]

Automatic

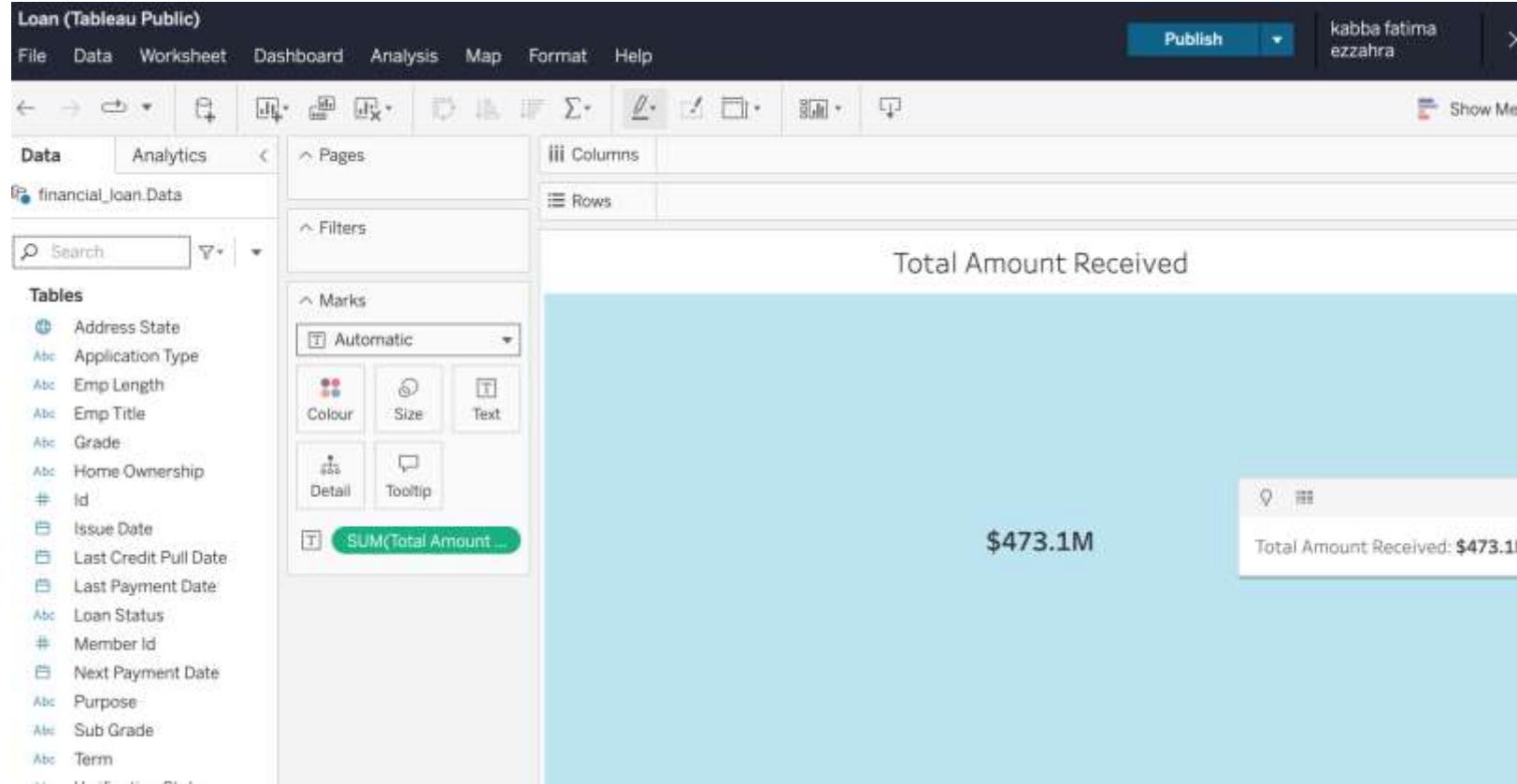
Colour Size  
Detail Tool

The calculation is valid.

Apply OK

This screenshot shows the Tableau Public interface. The top navigation bar includes File, Data, Worksheet, Dashboard, Analysis, Map, Format, Help, Publish, and a user profile. A search bar is present on the left. The main area displays a data source named 'financial\_loan.Data'. A context menu is open over a field, showing options like 'Pages', 'Columns', 'Rows', 'Filters', 'Marks', and 'Measures'. A modal dialog titled 'Total Amount Received' is centered, containing the expression '[Total Payment]'. Below the expression are buttons for 'Apply' and 'OK'. The message 'The calculation is valid.' is displayed at the bottom of the dialog. The background shows the rest of the Tableau interface with various data fields listed on the left.

# Total Amount Received



## MTDTotal Amount received

Loan (Tableau Public)

File Data Worksheet Dashboard Analysis Map Format Help Publish kabba fa  
ezzahra

← → ⏪ ⏩ ⏴ ⏵  $\Sigma$   $\sum$   $\bar{x}$   $\text{Sum}$   $\text{Avg}$

| Data                | Analytics |
|---------------------|-----------|
| financial_Joán.Data |           |

Search

Abc Purpose  
Abc Sub Grade  
Abc Term  
Abc Verification Status  
Abc Measure Names  
Annual Income  
DtI  
Installment  
Int Rate  
Loan Amount  
MOM Funded Amount  
MOM Total Appli  
MTD Total Funded Amo...  
**MTD Total Funded Amo...**  
MTD Total Loan Applica...  
PMTD Total Funded Am...  
PMTD Total Loan Applic...  
Total A...

Pages  Columns   
Rows

Marks  Automatic  SUM(expression)  
Colour  Size   
Detail  Tool   
SUM(Tot)

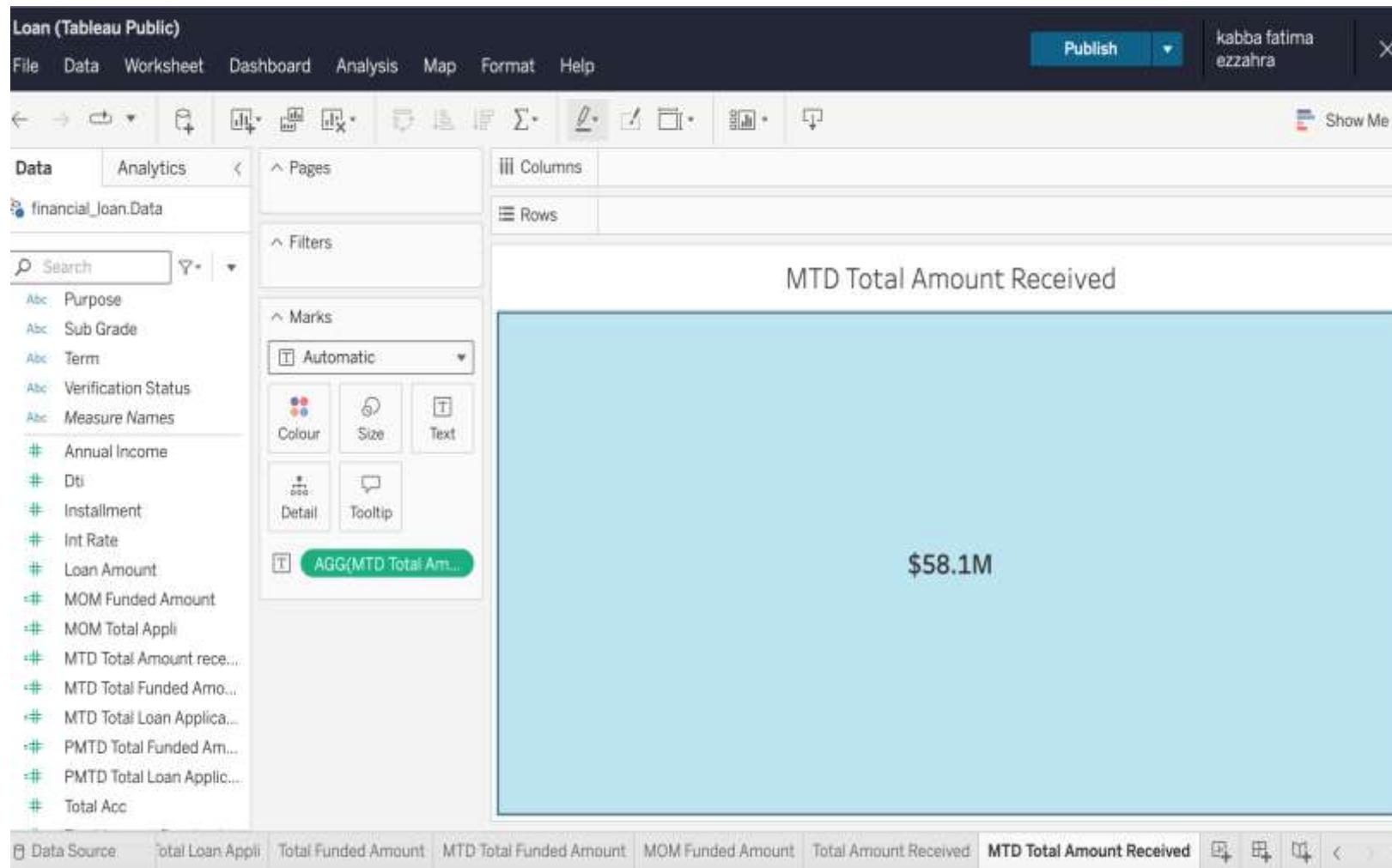
MTD Total Amount received

```
SUM(IF DATEDIFF('month', [Issue Date], {MAX([Issue Date])} <= Today()) THEN [Total Payment] ELSE 0 END)
```

The calculation is valid.

Apply OK

# MTD Total Amount received



# MOM Total Amount Received

Loan (Tableau Public)

File Data Worksheet Dashboard Analysis Map Format Help

Publish kabba fatima ezzahra X

Data Analytics < Pages Columns Rows

financial\_loan.Data

Search T+ Sub Grade

Term Verification Status Measure Names

Annual Income Dti Installment Int Rate Loan Amount

MOM Funded Amount MOM Total Appl MTD Total Amount rece...

MTD Total Funded Amo... MTD Total Loan Applica...

PMTD Total Amount rec... PMTD Total Funded Am...

PMTD Total Loan Appl...

Total Acc

MOM Total Amount Received

([MTD Total Funded Amount]-[PMTD Total Funded Amount ])/[PMTD Total Funded Amount ]

The calculation is valid.

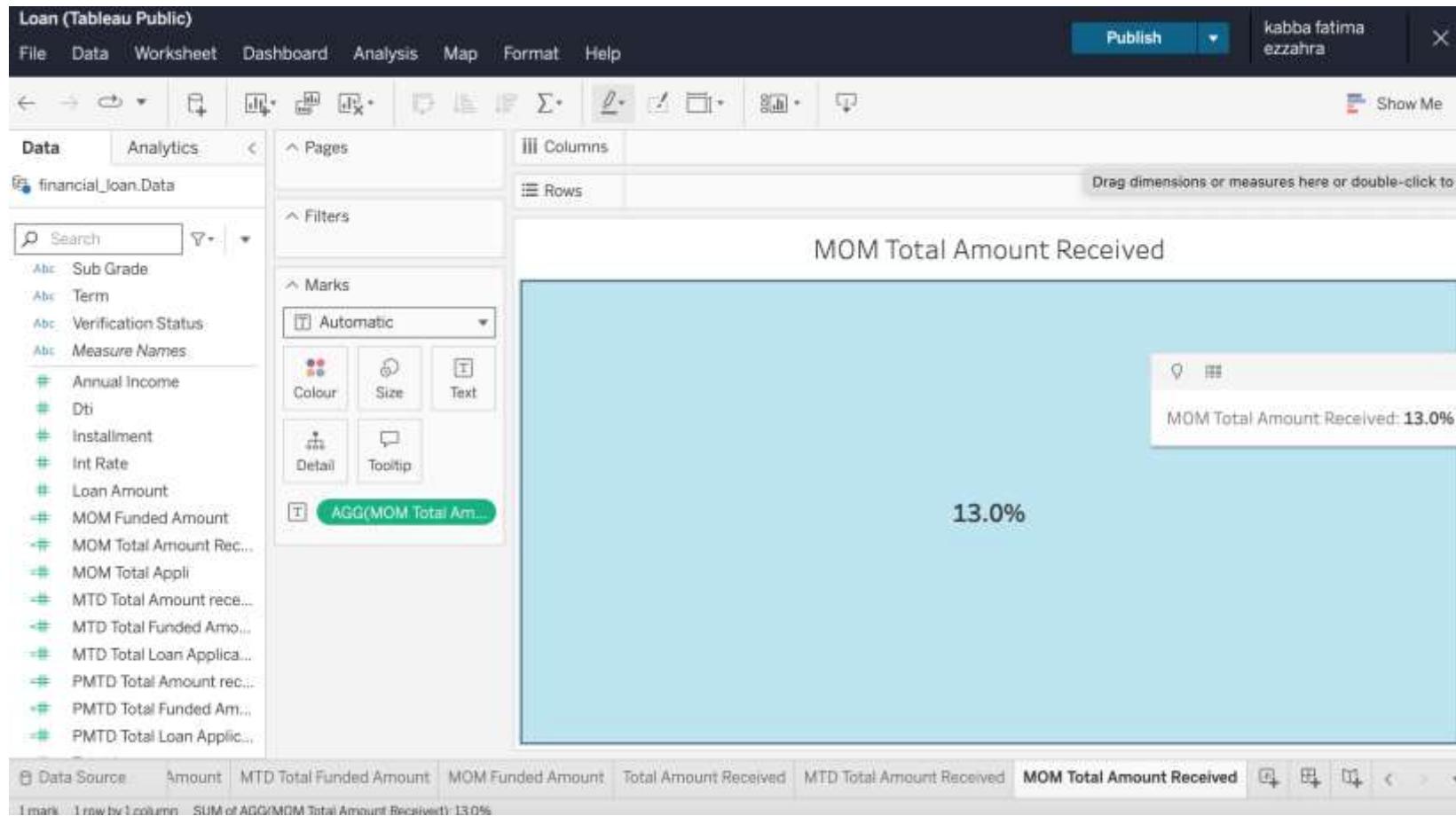
Colour Size Detail Tooltip

OK Apply

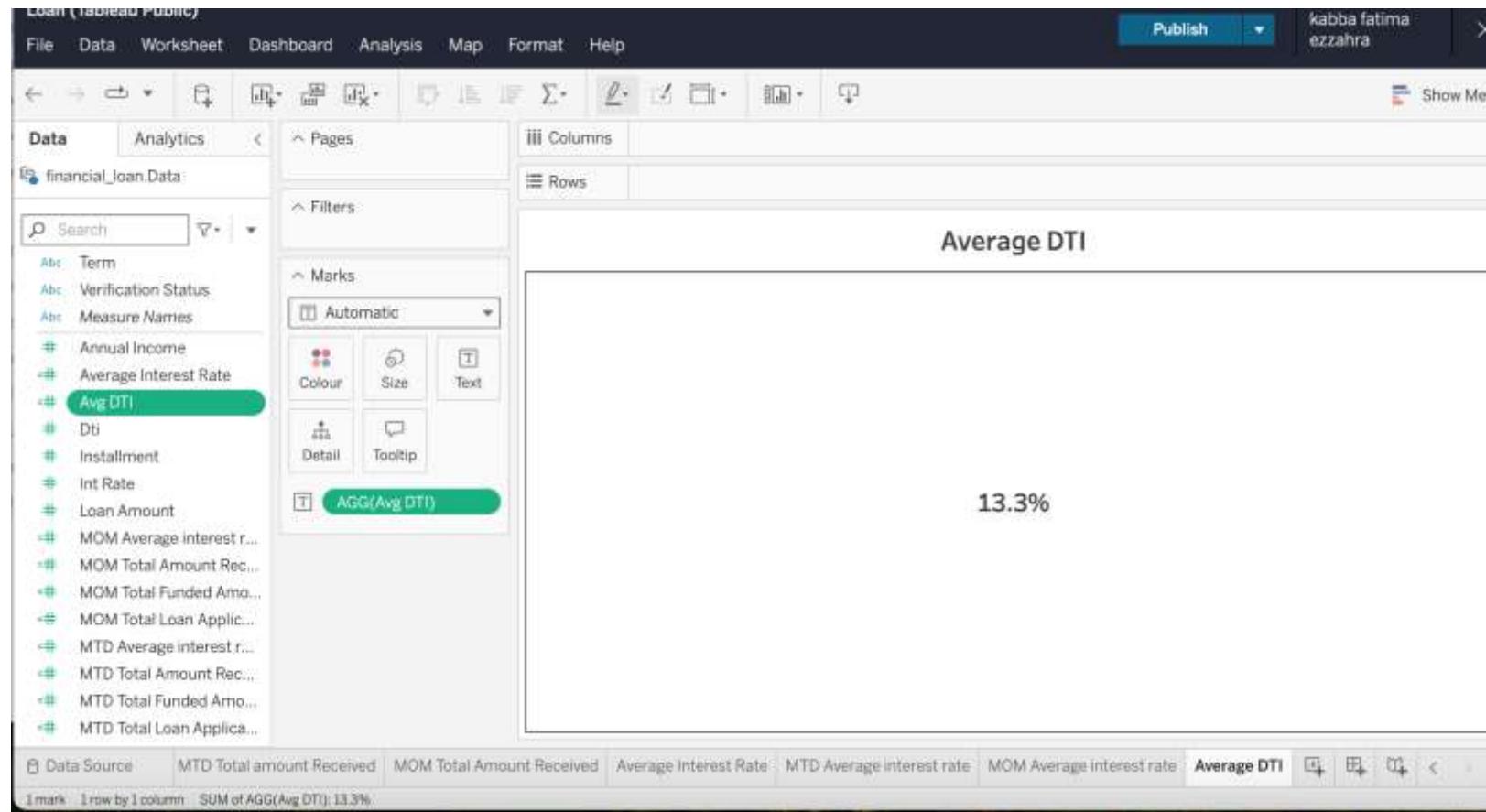
Data Source Amount MTD Total Funded Amount MOM Funded Amount Total Amount Received MTD Total Amount Received MOM Total Amount Received

This screenshot shows the Tableau Public interface with a calculated field dialog open. The calculated field is named 'MOM Total Amount Received' and contains the formula:  $([MTD\ Total\ Funded\ Amount]-[PMTD\ Total\ Funded\ Amount\ ]) / [PMTD\ Total\ Funded\ Amount]$ . The dialog also displays the message 'The calculation is valid.' with 'Apply' and 'OK' buttons. The background shows the data source 'financial\_loan.Data' and various dimensions and measures listed in the data pane.

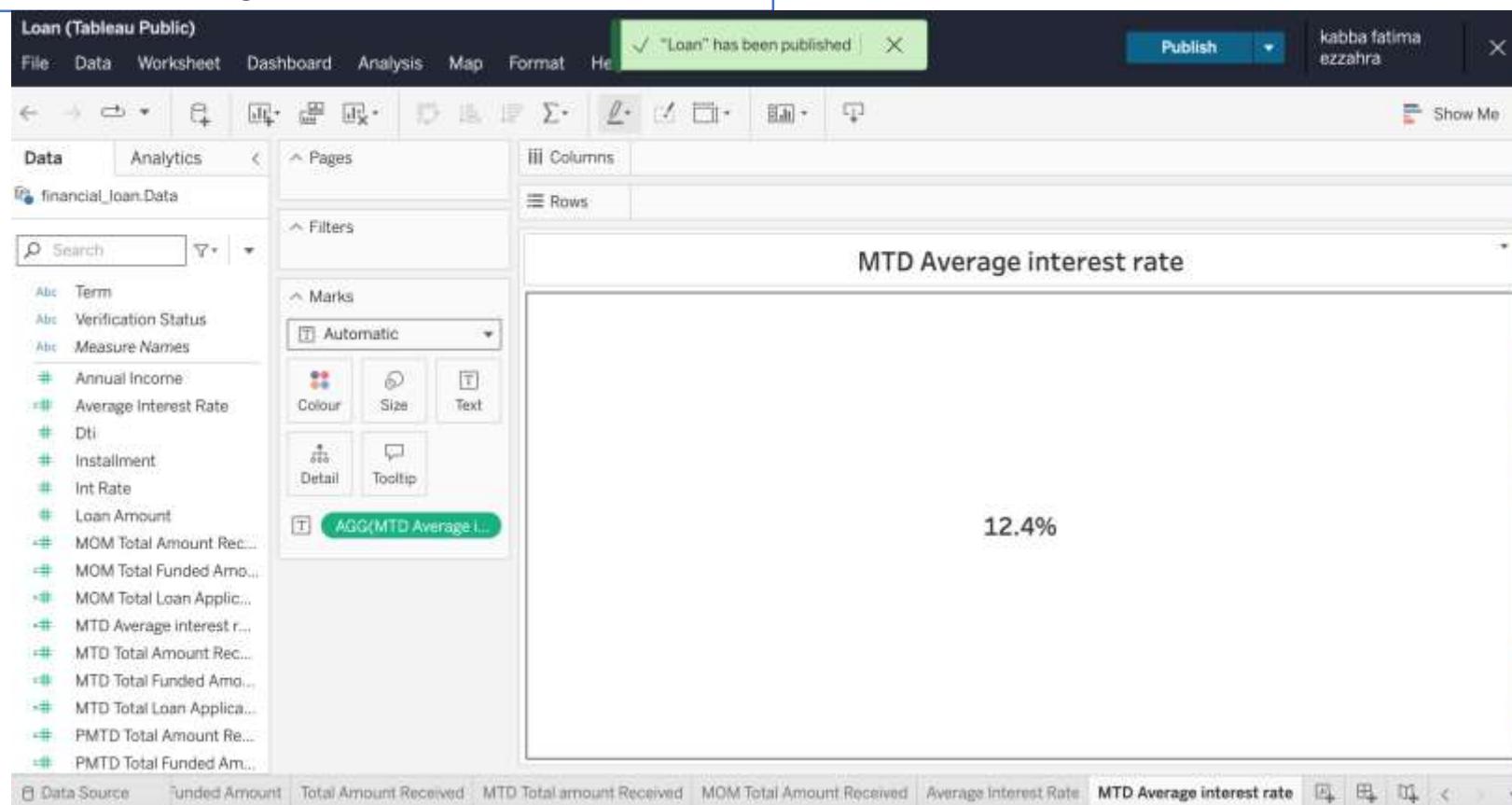
# MOM Total Amount Received



# Average DTI



# MTD Average interest rate



# MOM Total Amount Received

Loan (Unread Public)

File Data Worksheet Dashboard Analysis Map Format Help ✓ "Loan" has been published X Publish kabba fatima ezzahra X

Data Analytics < ^ Pages Columns Rows

financial\_Join.Data

Search ▾

- Average Interest Rate
- Dti
- Installment
- Int Rate
- Loan Amount
- MOM Total Amount Rec...
- MOM Total Funded Amo...
- MOM Total Loan Applic...
- MTD Average interest r...
- MTD Total Amount Rec...
- MTD Total Funded Amo...
- MTD Total Loan Applica...
- PMTD Total Amount Re...
- PMTD Total Amount Rec...
- PMTD Total Funded Am...
- PMTD Total Loan Applic...
- Total Acc
- Total Amount Received

Marks

Automatic

Colour Size Detail Tooltip

PMTD Average interest rate

```
AVG(IF  
DATEDIFF('month', [Issue Date], MAX([Issue Date]))= 1  
THEN  
[Int Rate]  
END)
```

The calculation is valid.

Apply OK

Data Source Total Amount Received MTD Total amount Received MOM Total Amount Received Average Interest Rate MTD Average interest rate MOM Average interest rate

# MOM Average interest rate

Loan (Tableau Public)

File Data Worksheet Dashboard Analysis Map Format Help ✓ "Loan" has been published X Publish kabba fatima ezzahra X

Data Analytics < ^ Pages Columns Rows

financial\_loan.Data

Search ▾

- # Average Interest Rate
- # DtI
- # Installment
- # Int Rate
- # Loan Amount
- # MOM Total Amount Rec...
- # MOM Total Funded Amo...
- # MOM Total Loan Applic...
- # MTD Average interest r...
- # MTD Total Amount Rec...
- # MTD Total Funded Amo...
- # MTD Total Loan Applica...
- # PMTD Average interest...
- # PMTD Total Amount Rec...
- # PMTD Total Funded Amo...
- # PMTD Total Loan Applic...
- Total Acc
- Total Amount Received

^ Marks Automatic

Colour Size Detail Tooltip

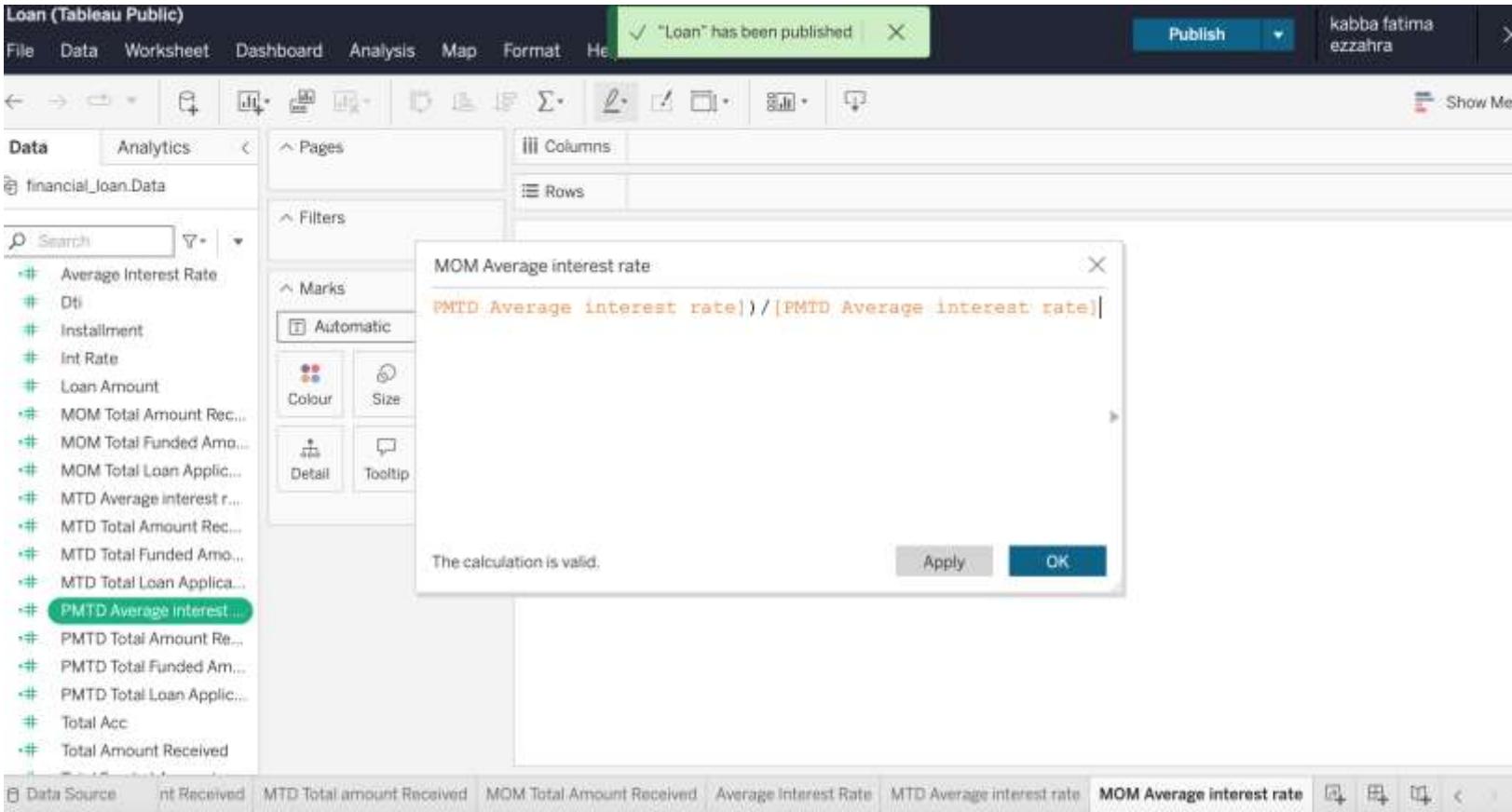
MOM Average interest rate

PMTD Average interest rate) / [PMTD Average interest rate]

The calculation is valid.

Apply OK

Data Source nt Received MTD Total amount Received MOM Total Amount Received Average Interest Rate MTD Average interest rate MOM Average interest rate



# AVG dti

Loan (Tableau Public)

File Data Worksheet Dashboard Analysis Map Format Help ✓ "Loan" has been published X Publish kabba fatima ezzahra

Data Analytics < ^ Pages Columns Rows

financial\_loan.Data

Search ▾

Avg DTI

AVG([Dti])

Marks Automatic

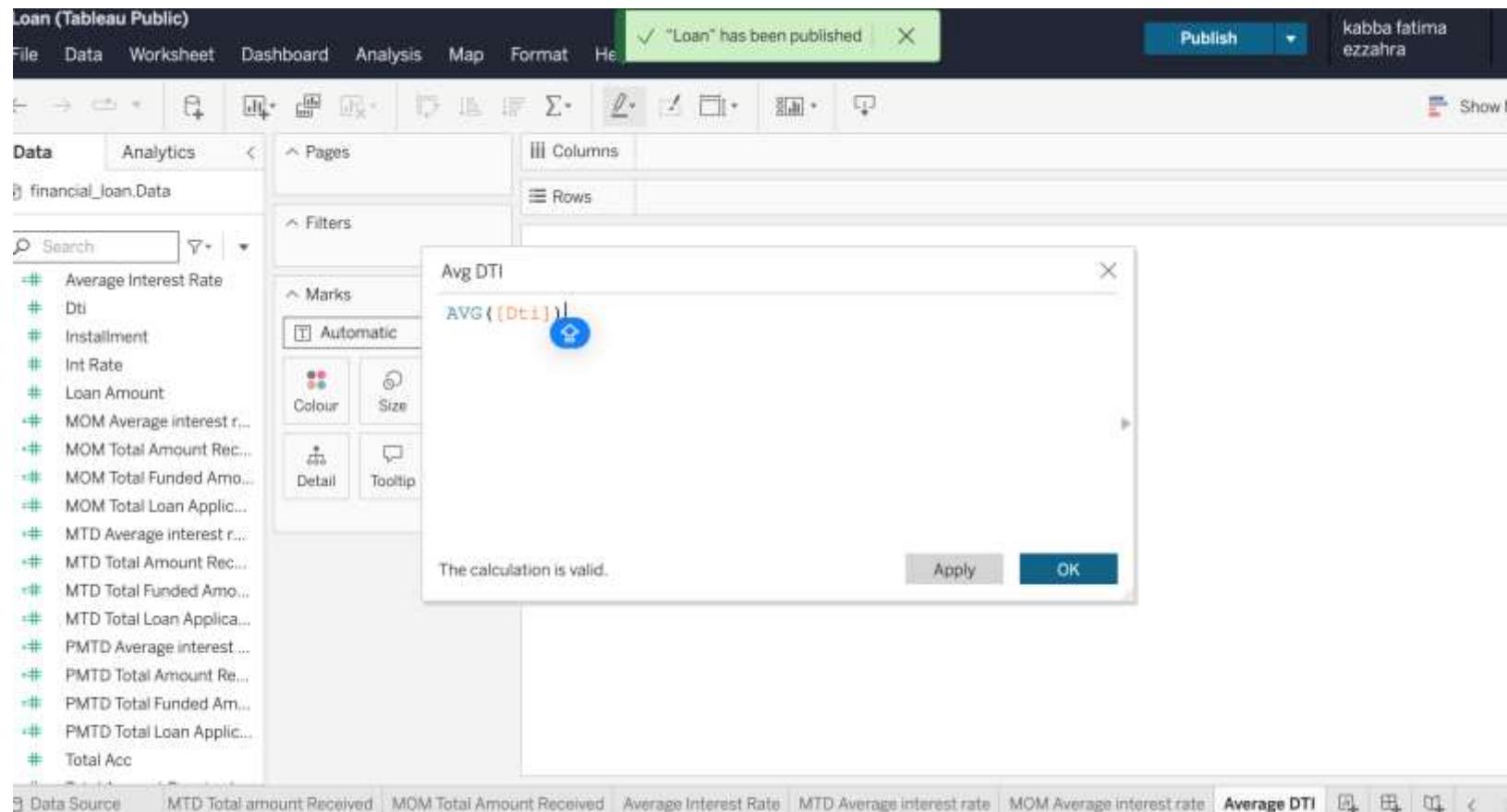
Colour Size

Detail Tooltip

The calculation is valid.

Apply OK

Data Source MTD Total amount Received MOM Total Amount Received Average Interest Rate MTD Average interest rate MOM Average interest rate Average DTI



# MOM Total Amount Received

Loan (Tableau Public)

File Data Worksheet Dashboard Analysis Map Format Help ✓ "Loan" has been published X Publish kabba fatima ezzahra X

Data Analytics financial\_loan.Data

Search

Avg DTI

Avg DTI

Automatic

Colour Size

Dt Detail Tooltip

AGG(Avg DTI)

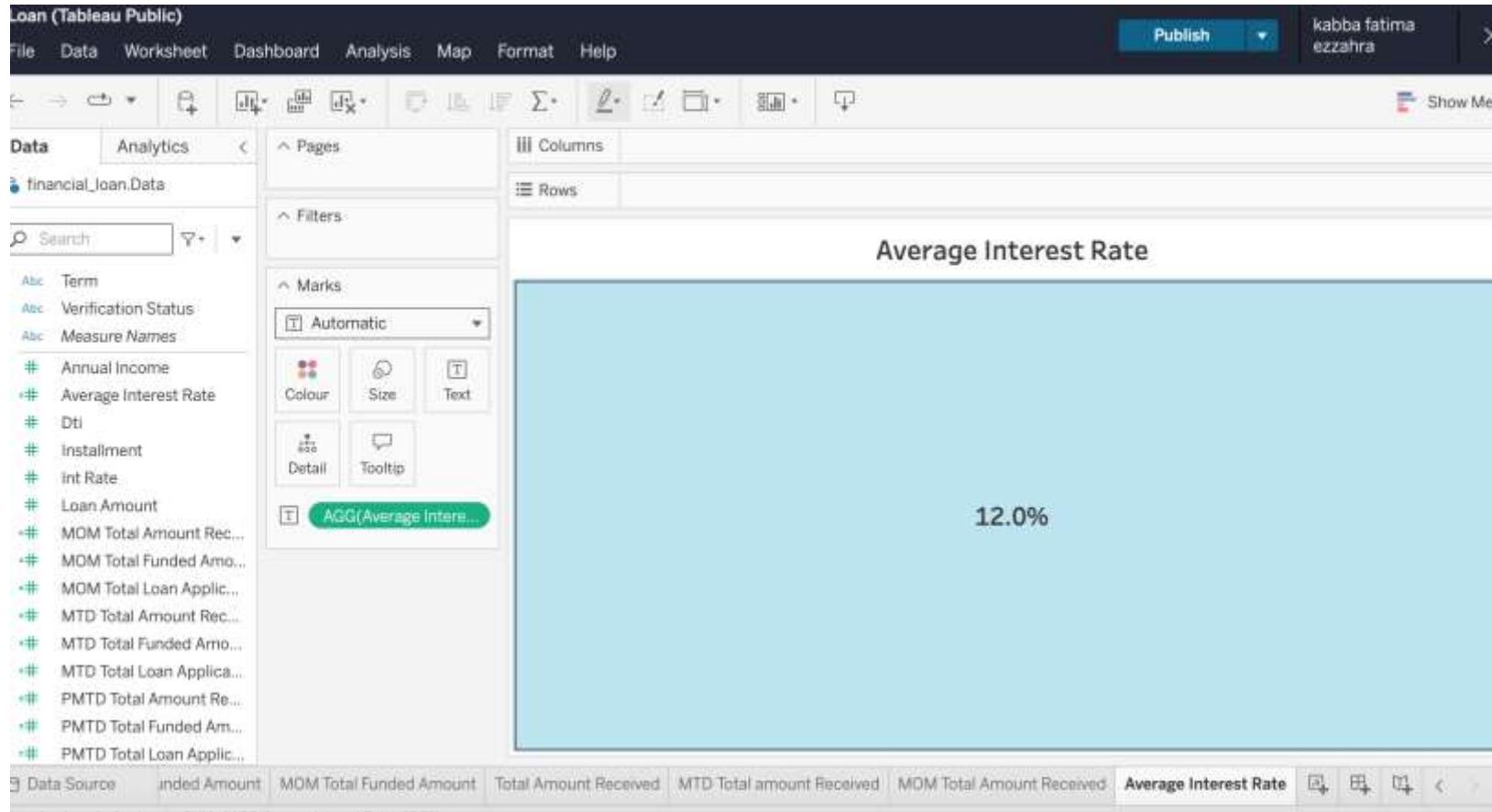
The calculation is valid.

1 Dependency Apply OK

Data Source MTD Total amount Received MOM Total Amount Received Average Interest Rate MTD Average interest rate MOM Average interest rate Average DTI

1 mark 1 row by 1 column SUM of AGG(Avg DTI): 13.3%

# Average interest rate



# MTD Average interest rate

Loan (Tableau Public)

File Data Worksheet Dashboard Analysis Map Format Help ✓ "Loan" has been published | X Publish kabba fatima ezzahra >

Data Analytics < ^ Pages Columns Rows

financial\_loan.Data

Search ▾

Marks:

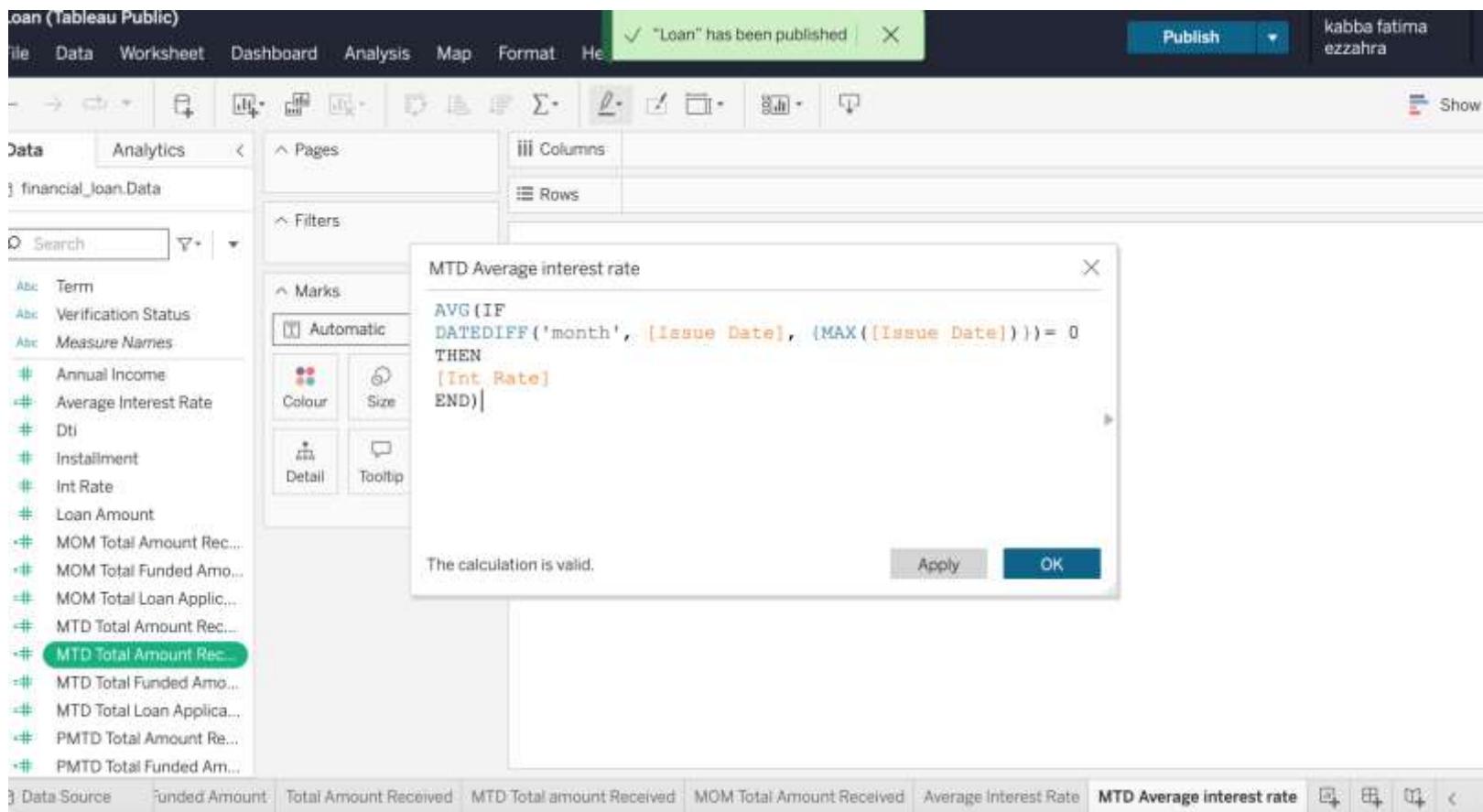
MTD Average interest rate

```
AVG(IF  
DATEDIFF('month', [Issue Date], {MAX([Issue Date])})= 0  
THEN  
[Int_Rate]  
END)|
```

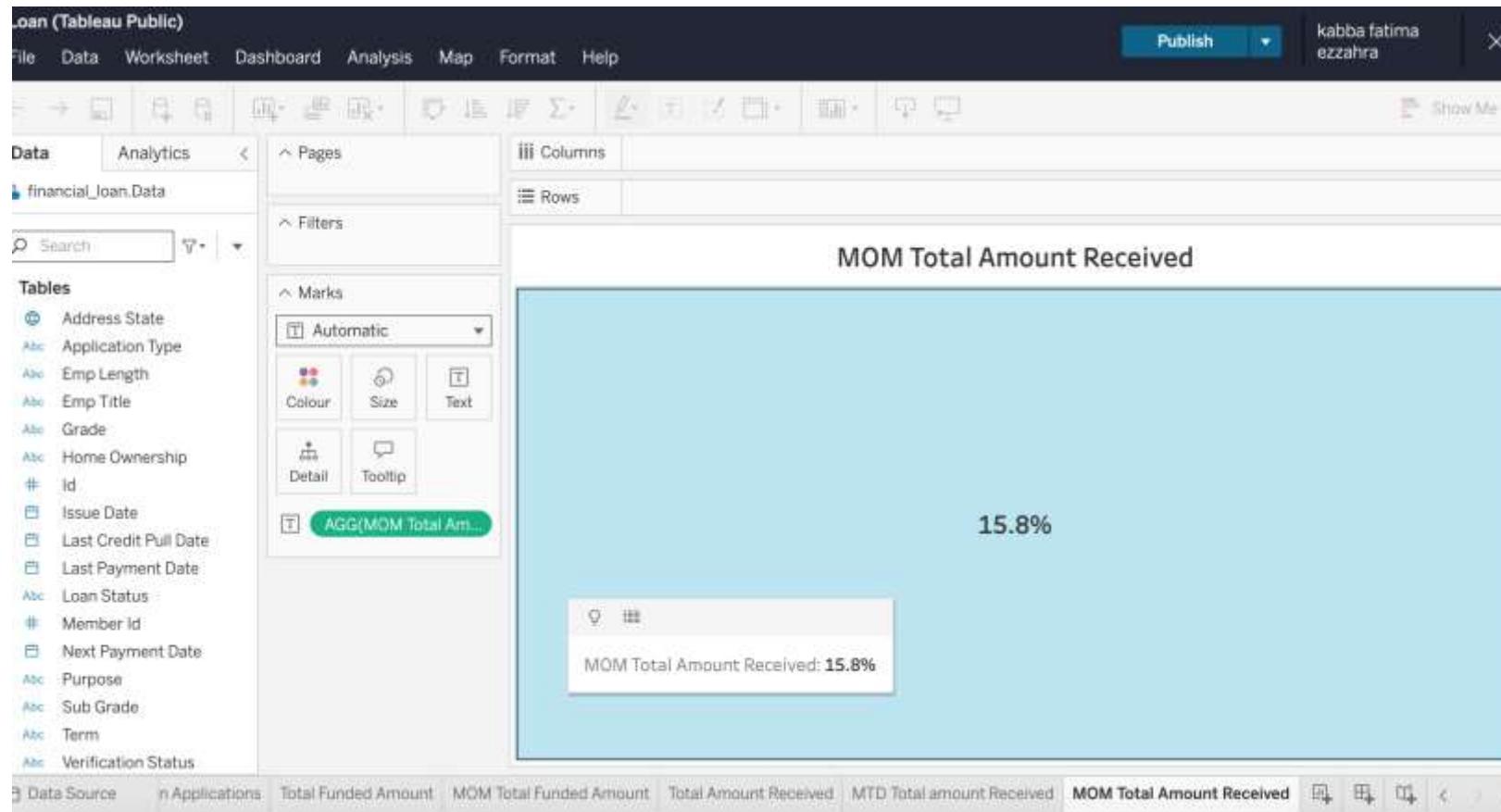
The calculation is valid.

Apply OK

Data-Source Funded Amount Total Amount Received MTD Total amount Received MOM Total Amount Received Average Interest Rate MTD Average interest rate



# Average interest rate



# Average interest rate

The screenshot shows the Tableau desktop application interface. The top menu bar includes Data, Worksheet, Dashboard, Analysis, Map, Format, Help, Publish, and a user profile for 'Kabou latima ezzahra'. The main workspace displays a data source named 'Financial\_Loan\_Data' with a search bar. A floating dialog box titled 'Average Interest Rate' contains the calculation `AVG([Int Rate])`. The dialog also includes tabs for 'Automatic' (selected), 'Colour', 'Size', 'Detail', and 'Tooltip', and a message stating 'The calculation is valid.' with 'Apply' and 'OK' buttons. On the left, the 'Analytics' shelf is open, showing various measures and dimensions such as Term, Verification Status, Measure Names, Annual Income, Dti, Installment, Int Rate, Loan Amount, and several MTD and PMTD metrics.

# Average interest rate

loan (Tableau Public)

File Data Worksheet Dashboard Analysis Map Format Help ✓ "Loan" has been published | X Publish kabba fatima ezzahra >

Data Analytics < ^ Pages III Columns  
Rows

Filters

Search ▾

Marks

Automatic

Colour Size

Detail Tooltip

MTD Average interest rate

```
AVG(IF  
DATEDIFF('month', [Issue Date], {MAX([Issue Date])})= 0  
THEN  
[Int_Rate]  
END)|
```

The calculation is valid.

Apply OK

Data Source Funded Amount Total Amount Received MTD Total amount Received MOM Total Amount Received Average Interest Rate MTD Average interest rate

This screenshot shows the Tableau interface with a calculated field dialog open. The dialog title is 'MTD Average interest rate'. The formula entered is: `AVG(IF DATEDIFF('month', [Issue Date], {MAX([Issue Date])})= 0 THEN [Int_Rate] END)|`. Below the formula, a message says 'The calculation is valid.' There are 'Apply' and 'OK' buttons at the bottom right. The background shows the Tableau workspace with various data sources and measures listed on the left.

# MOM Average interest rate

Loan (Tableau Public)

Data Worksheet Dashboard Analysis Map Format Help

Published by kabba latima ezzahra

Show Me

Analytics

Search

Int Rate  
Loan Amount  
MOM Average DTI  
MOM Average interest r...  
MOM Total Amount Rec...  
MOM Total Funded Ama...  
MOM Total Loan Applic...  
MTD Average DTI  
MTD Average interest r...  
MTD Total Amount Rec...  
MTD Total Funded Amo...  
MTD Total Loan Applica...  
PMTD Average DTI  
PMTD Average interest ...  
PMTD Total Amount Re...  
PMTD Total Funded Am...

Pages Columns Rows

Filters

MTD Average interest rate

```
AVG(IF  
DATEDIFF('month', [Issue Date], (MAX([Issue Date])))= 0  
THEN  
(Int Rate)  
END)
```

The calculation is valid.

3 Dependencies \* Apply OK

Data Source MTD Total Funded Amount Total Amount Received MTD Total amount Received MOM Total Amount Received Average Interest Rate MTD Average interest rate MOM

# MOM Average interest rate

Loan (Tableau Public)

Data Worksheet Dashboard Analysis Map Format Help

Publish kabba fatima ezzahra X

Show Me

Analytics

Financial\_loan.Data

Search

Roles

- Address State
- Application Type
- Emp Length
- Emp Title
- Grade
- Home Ownership
- Id
- Issue Date
- Last Credit Pull Date
- Last Payment Date
- Loan Status
- Member Id
- Next Payment Date
- Purpose
- Sub Grade

Pages

Filters

Marks

- Automatic
- Colour
- Size
- Text
- Detail
- Tooltip

AGG(MOM Average ...)

## MOM Average interest rate

3.5%

MOM Average interest rate: 3.5%

Source Total Amount Received MTD Total amount Received MOM Total Amount Received Average Interest Rate MTD Average interest rate **MOM Average interest rate** Aver

# Average DTI

Loan (Tableau Public)

File Data Worksheet Dashboard Analysis Map Format Help Publish

Data Analytics < financial\_loan.Data

Search ▾

- # Annual Income
- # Average Interest Rate
- # Avg DTI
- # Dti
- # Installment
- # Int Rate
- # Loan Amount
- # MOM Average DTI
- # MOM Average interest r...
- # MOM Total Amount Rec...
- # MOM Total Funded Amo...
- # MOM Total Loan Applica...
- # MTD Average DTI
- # MTD Average Interest r...
- # MTD Total Amount Rec...
- # MTD Total Funded Amo...
- # MTD Total Loan Applica...

Pages Columns Rows

Marks Automatic

- Colour
- Size
- Text
- Detail
- Tooltip

AGG(Avg DTI)

The calculation is valid.

1 Dependency Apply OK

Data Source sum Received MTD Total amount Received MOM Total Amount Received Average Interest Rate MTD Average interest rate MOM Average interest rate Average DTI MTD

1 mark 1 row by 1 column SUM of AGG(Avg DTI): 13.3%

This screenshot shows the Tableau Public interface with a data source named 'financial\_loan.Data'. In the 'Marks' shelf, the 'Automatic' mark type is selected. A tooltip window is open over the 'Avg DTI' field, displaying the formula 'AVG([Dti])'. The message 'The calculation is valid.' is shown above the dependency count. At the bottom of the screen, a summary bar provides information about the current view: '1 mark 1 row by 1 column SUM of AGG(Avg DTI): 13.3%'. The top navigation bar includes File, Data, Worksheet, Dashboard, Analysis, Map, Format, Help, and Publish buttons.

# Average DTI

Loan (Tableau Public)

File Data Worksheet Dashboard Analysis Map Format Help Publish

Data Analytics < financial\_loan.Data

Search

- Annual Income
- Average Interest Rate
- Avg DTI**
- Dti
- Installment
- Int Rate
- Loan Amount
- MOM Average DTI
- MOM Average interest r...
- MOM Total Amount Rec...
- MOM Total Funded Amo...
- MOM Total Loan Applic...
- MTD Average DTI
- MTD Average interest r...
- MTD Total Amount Rec...
- MTD Total Funded Amo...
- MTD Total Loan Annlica...

Pages Columns Rows

Marks Automatic

- Colour
- Size
- Text
- Detail
- Tooltip

AGG(Avg DTI)

## Average DTI

13.3%

Data Source Count Received MTD Total amount Received MOM Total Amount Received Average Interest Rate MTD Average interest rate MOM Average interest rate **Average DTI** MT

The screenshot shows the Tableau Public interface with a single data point visualization. The visualization displays the value '13.3%' in bold black text. The 'Average DTI' title is centered above the value. The 'Marks' shelf on the left indicates the value is set to 'Automatic' with 'Text' selected. The 'Data' shelf on the left lists various financial metrics, with 'Avg DTI' highlighted in green. The bottom navigation bar includes tabs for 'Data Source', 'Count Received', 'MTD Total amount Received', 'MOM Total Amount Received', 'Average Interest Rate', 'MTD Average interest rate', 'MOM Average interest rate', 'Average DTI', and 'MT'.

# MTD Average DTI

The screenshot shows a Tableau Public worksheet titled "Loan (Tableau Public)". The top navigation bar includes File, Data, Worksheet, Dashboard, Analysis, Map, Format, Help, Publish, and a user profile. The main interface features a sidebar with "Data" and "Analytics" tabs, a search bar, and a list of data items. The "Analytics" tab is active, displaying a calculated field editor for "MTD Average DTI". The editor contains the following DAX formula:

```
AVG(IF  
DATEDIFF('month', [Issue Date], {MAX([Issue Date])})= 0  
THEN  
[DtI]  
END)
```

The formula uses the IF function to check if the difference in months between the current issue date and the maximum issue date is zero. If true, it returns the value of the [DtI] field; otherwise, it returns nothing. The editor also shows "The calculation is valid." and "3 Dependencies". Buttons for "Apply" and "OK" are present at the bottom.

# MOM Average DTI

Loan (Tableau Public)

kabba fatima ezzahra

File Data Worksheet Dashboard Analysis Map Format Help

Show Me

Pages

Rows

Marks

Automatic

Colour Size Text

Detail Tooltip

AGG(MOM Average DTI)

MOM Average DTI

MTD Average DTI) - (PMTD Average DTI ) / (PMTD Average DTI )

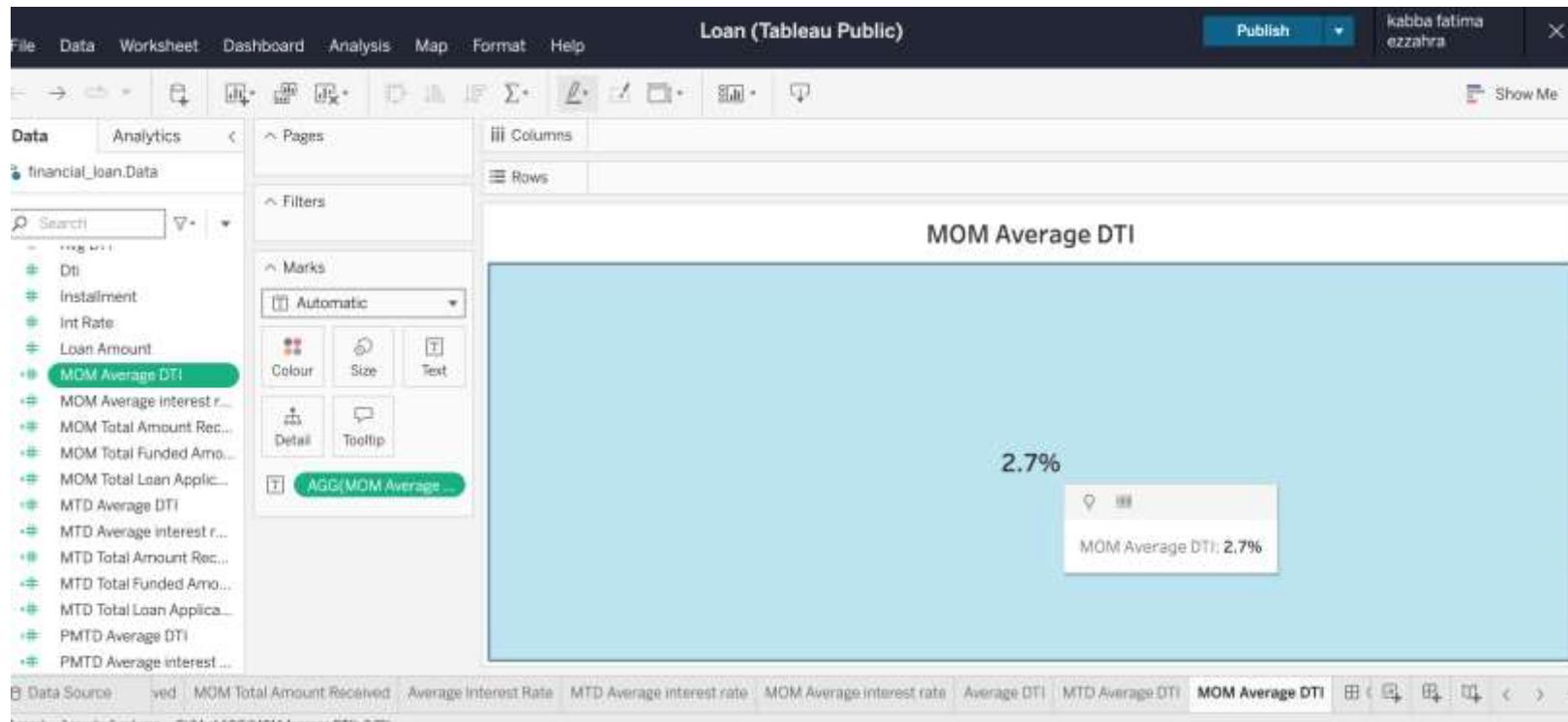
The calculation is valid.

Dependency Apply OK

Data Source: MTD Total Amount Received Average Interest Rate MTD Average interest rate MOM Average interest rate Average DTI MTD Average DTI MOM Average DTI

This screenshot shows the Tableau Public interface with a calculated field dialog open. The formula is correctly defined as  $(MTD \text{ Average DTI}) - (PMTD \text{ Average DTI}) / (PMTD \text{ Average DTI})$ . The 'AGG' function is used to handle the calculation across multiple rows. The calculation is marked as valid.

# MOM Average DTI



# Dashboard

The screenshot shows the Tableau Public interface with a floating 'Edit Text' dialog box. The main dashboard area has a dark blue header with the title 'Loan (Tableau Public)'. The top navigation bar includes File, Data, Worksheet, Dashboard, Map, Format, and Help. On the right side of the header, there are user details: 'kabba fatima ezzahra' and a sign-out button. Below the header is a toolbar with various icons for navigating and interacting with the dashboard. The left sidebar contains sections for Dashboard, Layout, Default (set to Phone), Device Preview, Size (set to PowerPoint (1600 x 900)), Sheets (listing Total Loan Applications, MTD Total Loan Applications, and MOM Total Loan Applications), and Objects (listing Horizontal Container, Vertical Container, Text, Extension, Image, Client, Tiled, and Floating). The 'Floating' tab is selected. At the bottom of the sidebar, there are tabs for Data Source, Overview, and other dashboard components. The central workspace is occupied by a floating 'Edit Text' dialog box. This dialog has a title bar 'Edit Text', a toolbar with font size (9), bold, italic, underline, color, and alignment buttons, an 'Insert' dropdown, and a 'Clear Formatting' button. The main content area of the dialog contains the text 'BANK LOAN REPORT SUMMARY' in a large, bold, black font. At the bottom of the dialog are 'Apply', 'Cancel', and 'OK' buttons. The background of the dashboard shows a dark blue design with some light blue horizontal bars.

# Dashboard

File Data Worksheet Dashboard Map Format Help

Loan (Tableau Public)

Publish kabba fatima ezzahra X

Show Me

Dashboard Layout < Default Phone

Device Preview

Size PowerPoint (1600 x 900) ▾

Sheets  Total Loan Applications  MTD Total Loan Applications  MOM Total Loan Applications

Objects  Horizontal Container  Vertical Container  Text  Extension  Image  Blank

Tiled **Floating**

Data Source M Total Amount Received Average Interest Rate MTD Average interest rate MOM Average interest rate Average DTI MTD Average DTI MOM Average DTI Overview

## Dashboard

## Dashboard

File Data Worksheet Dashboard Analysis Map Format Help

Loan (Tableau Public)

Publish kabba fatima ezzahra

Show Me

Dashboard Layout Device Preview

Size PowerPoint (1600 x 900)

Sheets Total Amount Received MTD Total amount Rec... MOM Total Amount Rec...

Objects Horizontal Container Vertical Container Text Extension Image Blank Tiled Floating

Show dashboard title

BANK LOAN REPORT|SUMMARY

Total Loan Applications: 38.6K (MTD: 4.3K, MOM: 6.91%)

Total Funded Amount: \$435.8M (MTD: \$54M, MOM: 13.0%)

Total Amount Received: \$473.1M (MTD: \$58.1M, MOM: 15.8%)

Data Source received Average Interest Rate MTD Average interest rate MOM Average interest rate Average DTI MTD Average DTI MOM Average DTI Overview

# Dashboard

File Data Worksheet Dashboard Analysis Map Format Help **Loan (Tableau Public)** Publish kabba fatima ezzahra

Show Me

## BANK LOAN REPORT|SUMMARY

|  |  |  |  |  |
|--|--|--|--|--|
| Total Loan Applications<br><b>38.6K</b><br>MTD 4.3K<br>MOM 6.91% | Total Funded Amount<br><b>\$435.8M</b><br>MTD \$54M<br>MOM 13.0% | Total Amount Received<br><b>\$473.1M</b><br>MTD \$58.1M<br>MOM 15.8% | Average Interest Rate<br><b>12.0%</b><br>MTD 12.4%<br>MOM 3.5% |  |
|--|--|--|--|--|

Data Source Received Average Interest Rate MTD Average interest rate MOM Average interest rate Average DTI MTD Average DTI MOM Average DTI Overview < >

# Dashboard

Loan (Tableau Public)

File Data Worksheet Dashboard Analytics

← → ⏪ ⏩ ⏴ ⏵

Data Analytics < ^ Pages

financial\_loan.Data

Search ▾

- Abc Grade
- Abc Home Ownership
- # Id
- ☐ Issue Date
- ☐ Last Credit Pull Date
- ☐ Last Payment Date
- Abc Loan Status
- Loan Status (group)**
- # Member Id
- ☐ Next Payment Date
- Abc Purpose
- Abc Sub Grade
- Abc Term
- Abc Verification Status
- Abc Measure Names
- # Annual Income

Edit Group [Loan Status (group)]

Field Name: Loan Status (group)

Charged Off

Good Loan

- Current
- Fully Paid

Colour

Detail

Group Ungroup Rename  Include "Other"

Find: Search

Show Options

Published by kabba fatima ezzahra

Show Me

Data Source Overview Good Loan Issues

# Dashboard

Loan (Tableau Public)

File Data Worksheet Dashboard Analytics

Data Analytics < ^ Pages

financial\_loan.Data

Search

Good Vs Bad Loan

- Abc Grade
- Abc Home Ownership
- # Id
- Issue Date
- Last Credit Pull Date
- Last Payment Date
- Abc Loan Status
- # Member Id
- Next Payment Date
- Abc Purpose
- Abc Sub Grade
- Abc Term
- Abc Verification Status
- Abc Measure Names
- # Annual Income

Group Ungroup Rename  Include "Other"

Find: Search

Show Options

Edit Group [Good Vs Bad Loan]

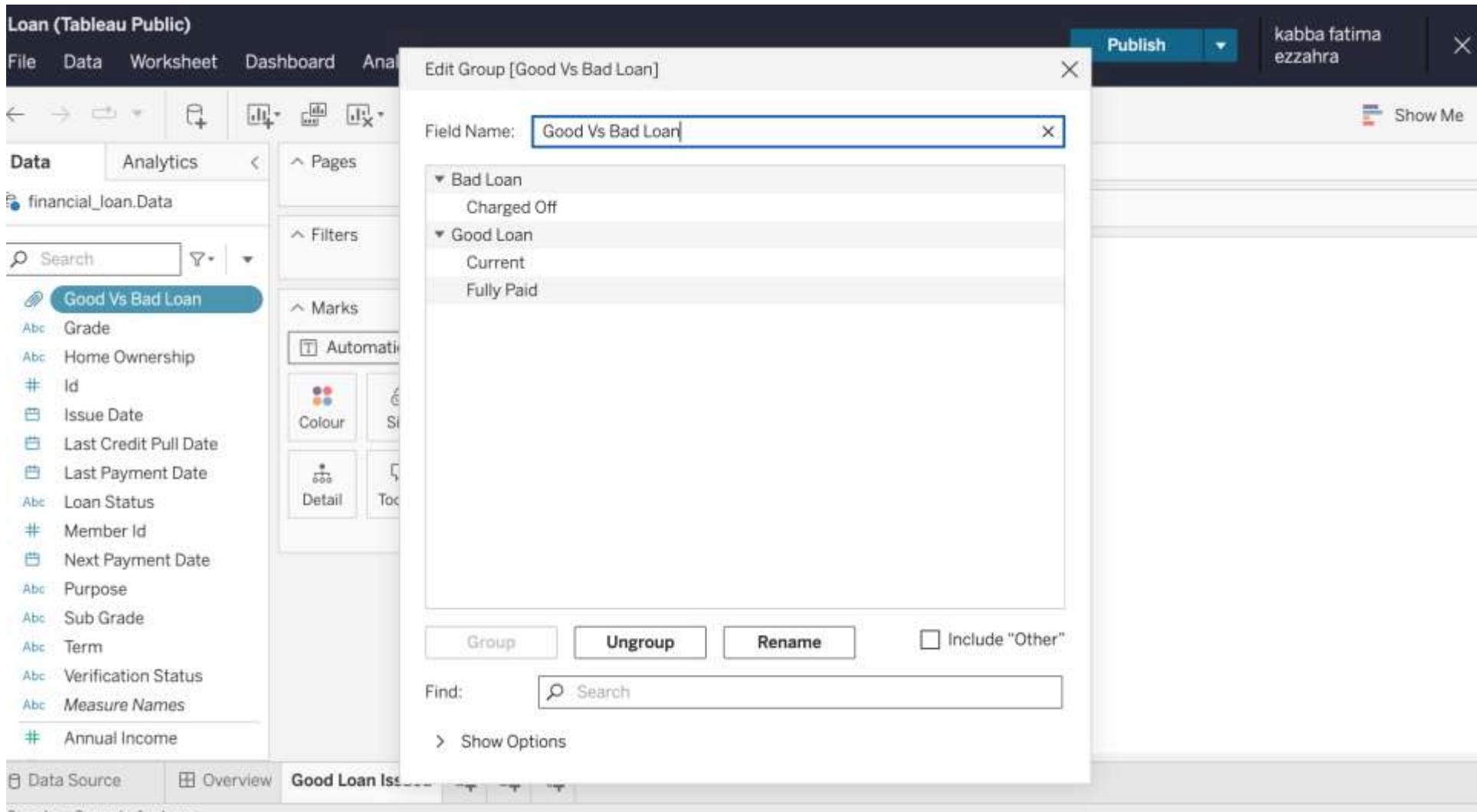
Field Name: Good Vs Bad Loan

Bad Loan  
Charged Off

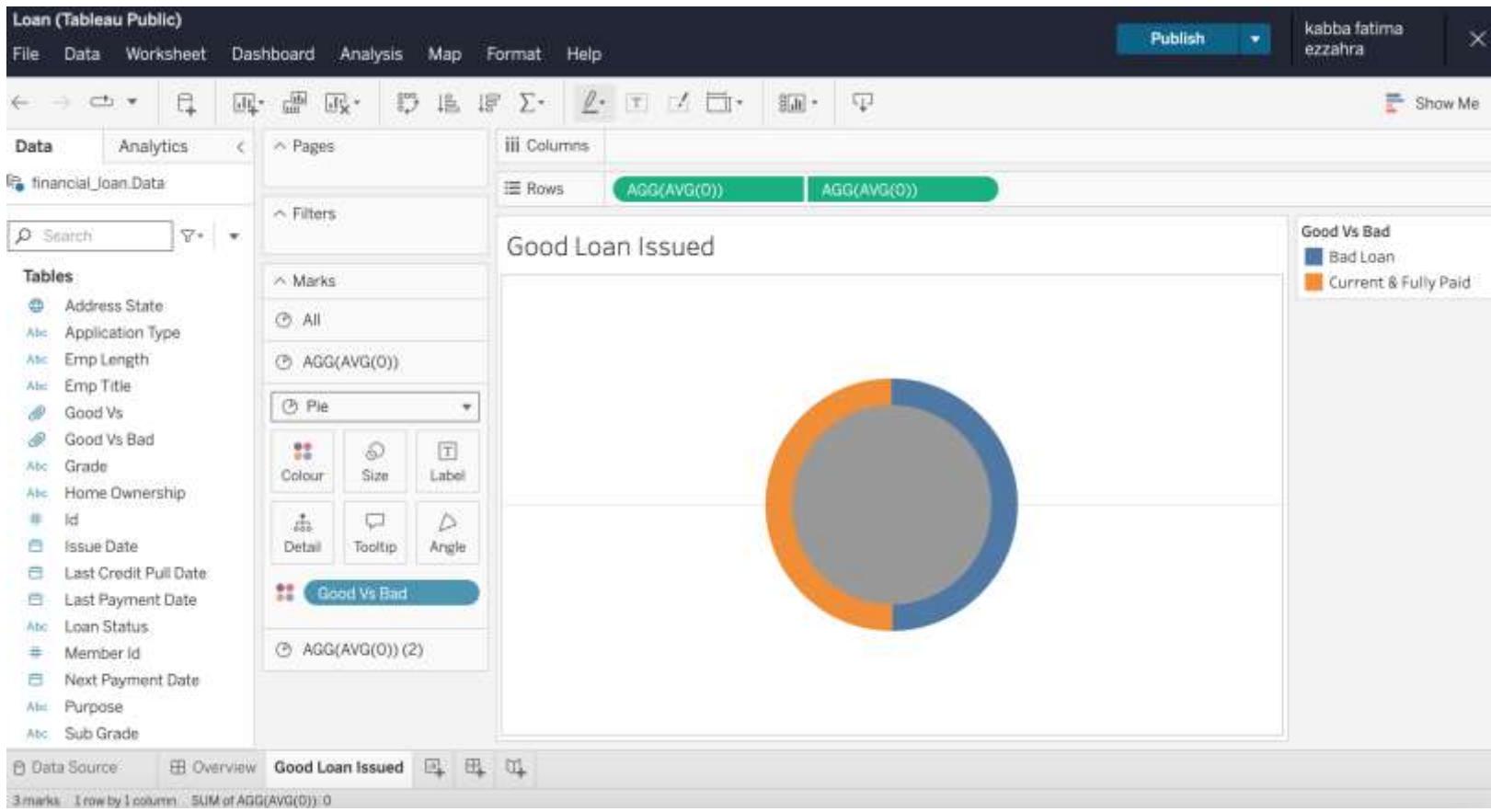
Good Loan  
Current  
Fully Paid

Publish kabba fatima ezzahra X Show Me

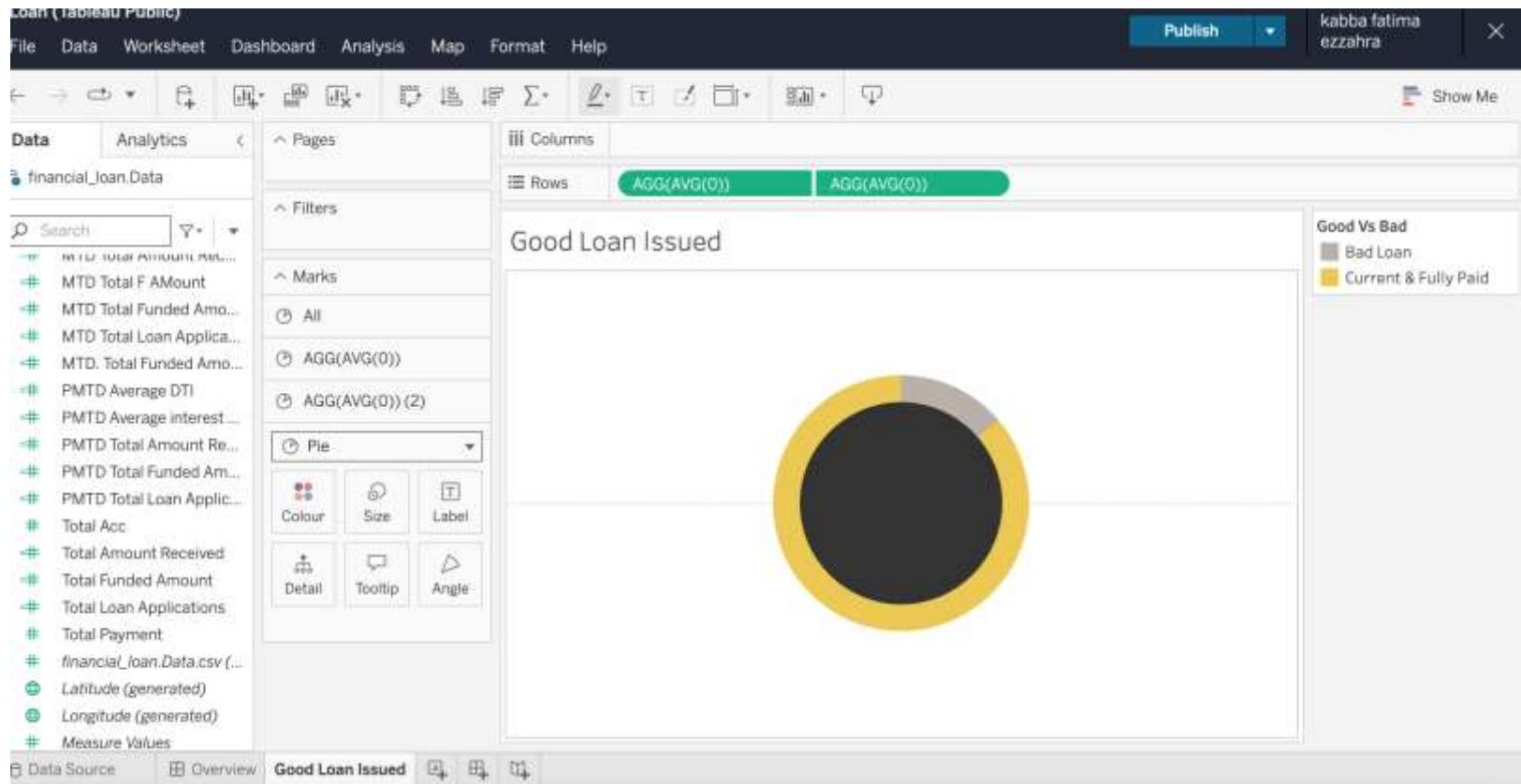
Data Source Overview Good Loan Iss



# Dashboard



# Dashboard



# Dashboard

Loan (Tableau Public)

File Data Worksheet Dashboard Analysis Map Format Help

Publish kabba fatima ezzahra X

Show Me

Data Analytics < financial\_loan.Data

Search ▾

Tables

- Address State
- Application Type
- Emp Length
- Emp Title
- Good Vs
- Good Vs Bad
- Grade
- Home Ownership
- Id
- Issue Date
- Last Credit Pull Date
- Last Payment Date
- Loan Status
- Member Id
- Next Payment Date
- Purpose
- Sub Grade

Pages Columns Rows

Marks Automatic

Colour Size Detail Tooltip

Good Loan %

COUNT (IF [Good Vs Bad] = 'Good Loan' THEN [Id] END) /COUNT([Id])

The calculation is valid.

Apply OK

Data Source Overview Good Loan Issued Good Loan application %

# Dashboard

Loan (Tableau Public)

File Data Worksheet Dashboard Analysis Map Format Help

Publish kabba fatima ezzahra X

Show Me

Data Analytics < financial\_loan.Data

Search ▾

- Avg DTI
- Dti
- Good Loan %
- Good loan Applications**
- Installment
- Int Rate
- Loan Amount
- MOM Average DTI
- MOM Average interest r...
- MOM Total Amount Rec...
- MOM Total Funded Amo...
- MOM Total Loan Applic...
- MTD Average DTI
- MTD Average interest r...
- MTD Total Amount Rec...
- MTD Total F AMount
- MTD Total Funded Amo...
- MTD Total Loan Applica...

Pages Columns Rows

Marks Automatic

Colour Size

Detail Tooltip

T AGG(Good lo

Good loan Applications

COUNT(IF [Good Vs Bad]='Good Loan' THEN [Id] END) /COUNT([Id])

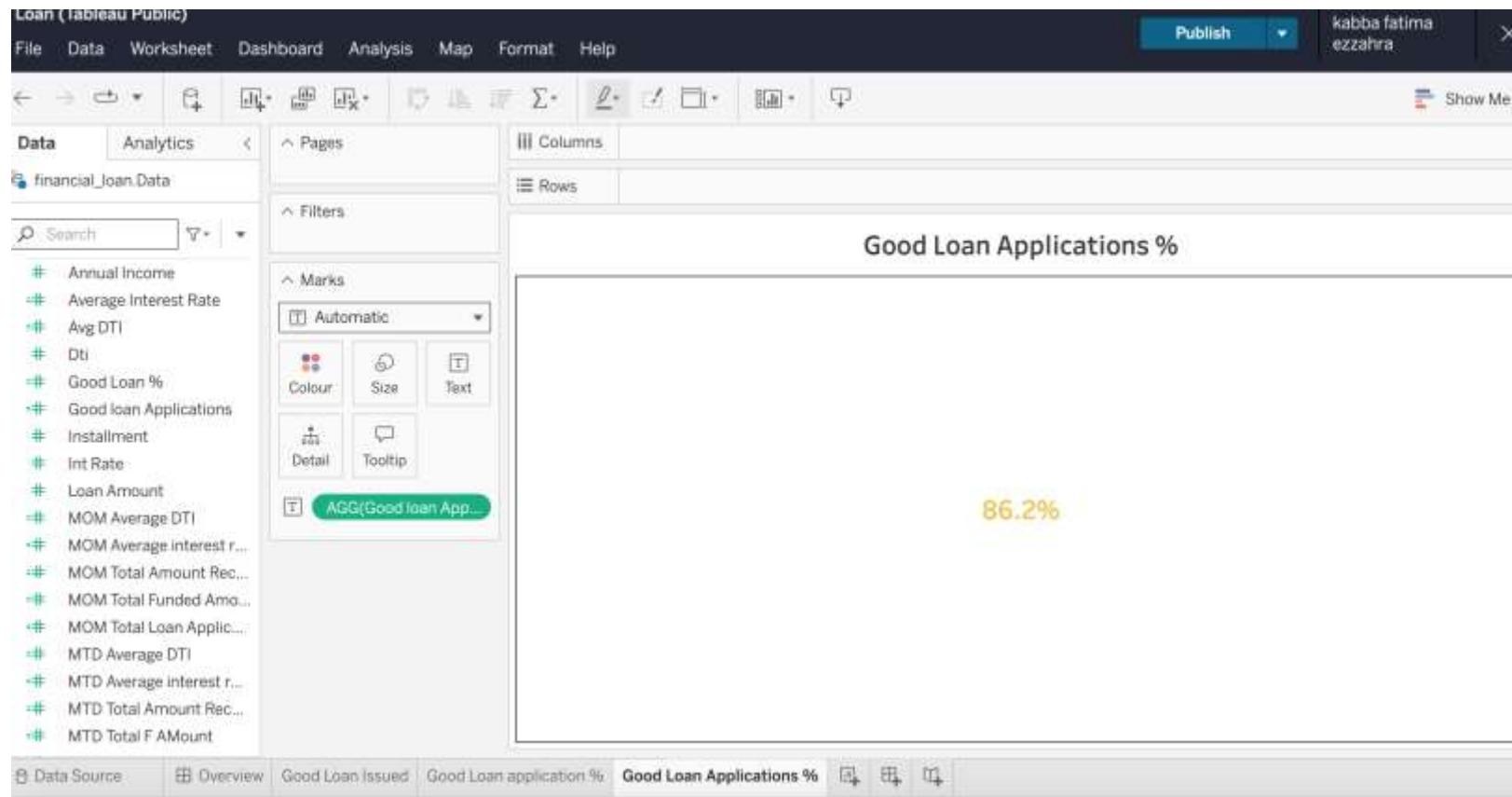
The calculation is valid.

1 Dependency \* Apply OK

Data Source Overview Good Loan Issued Good Loan application % **Good Loan Application** +

1 mark 1 row by 1 column SUM of AGG(Good loan Applications): 0.8618

# Dashboard



# Dashboard

Loan (tableau Public)

File Data Worksheet Dashboard Analysis Map Format Help

Publish kabba fatima ezzahra

Show Me

Data Analytics < financial\_loan.Data

Search ▾

Tables

- Address State
- Application Type
- Ernp Length
- Emp Title
- Good Vs
- Good Vs Bad
- Grade
- Home Ownership
- # Id
- Issue Date
- Last Credit Pull Date
- Last Payment Date
- Loan Status
- # Member Id
- Next Payment Date
- Purpose
- Sub Grade

Pages Columns Rows

Marks

Automatic

Colour Size Detail Tooltip

Good Loan Applications

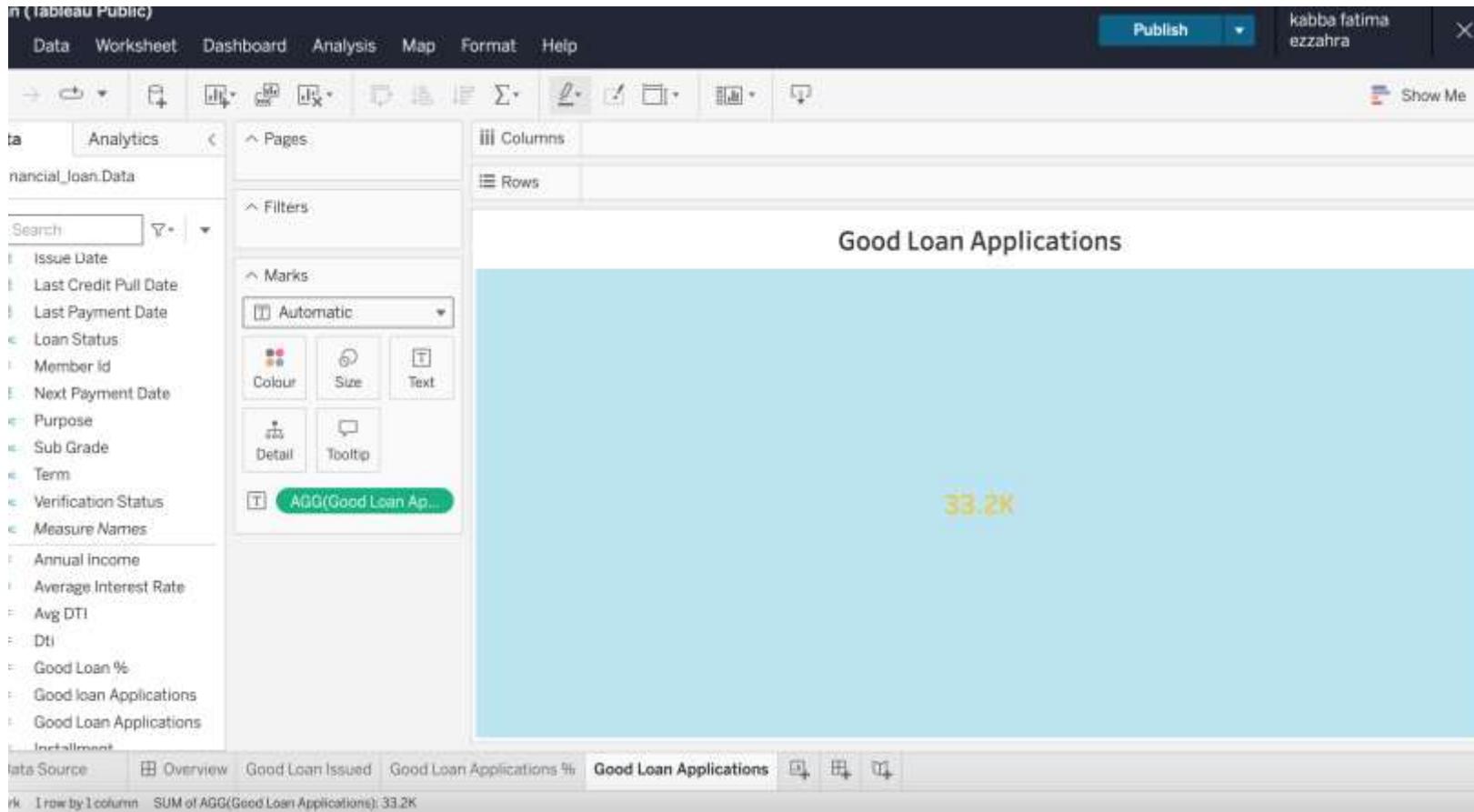
COUNT(IF [Good Vs Bad]='Good Loan' THEN [Id] END)

The calculation is valid.

Apply OK

Data Source Overview Good Loan Issued Good Loan Applications % Good Loan Applications

# Dashboard



# Dashboard

Loan (Tableau Public)

File Data Worksheet Dashboard Analysis Map Format Help

Publish X

kabba fatima  
ezzahra

Show Me

Data Analytics < ^ Pages Columns  
financial\_loan.Data Rows

Search X

Tables

- Address State
- Application Type
- Emp Length
- Emp Title
- Good Vs
- Good Vs Bad
- Grade
- Home Ownership
- Id
- Issue Date
- Last Credit Pull Date
- Last Payment Date
- Loan Status
- Member Id
- Next Payment Date
- Purpose
- Sub Grade

Marks

Automatic

Colour Size  
Detail Tooltip

Good Loan Funded

```
SUM{IF [Good Vs Bad] = 'Good Loan' THEN [Loan Amount] END}
```

The calculation is valid.

Apply OK

Data Source Overview Good Loan Issued Good Loan Applications % Good Loan Applications Good Loan Funded

# Dashboard

Loan (Tableau Public)

File Data Worksheet Dashboard Analysis Map Format Help

Publish kabba fatima ezzahra X

Show Me

Data Analytics < financial\_loan.Data

Search

- Last Credit Pull Date
- Last Payment Date
- Loan Status
- Member Id
- Next Payment Date
- Purpose
- Sub Grade
- Term
- Verification Status
- Measure Names
- Annual Income
- Average Interest Rate
- Avg DTI
- Dti
- Good Loan %
- Good loan Applications
- Good Loan Applications
- Good Loan Funded

Pages Columns Rows

Marks Automatic

Colour Size Text Detail Tooltip

AGG(Good Loan Fun...)

## Good Loan Funded

\$370.2M

Data Source Overview Good Loan Issued Good Loan Applications % Good Loan Applications Good Loan Funded Good Loan Amount Received

# Dashboard

Loan (Tableau Public)

File Data Worksheet Dashboard Analysis Map Format Help

Publish ▼

kabba fatima ezzahra X

Show Me

Data Analytics < ^ Pages Columns Rows

financial\_loan.Data

Search

Last Credit Pull Date  
Last Payment Date  
Loan Status  
Member Id  
Next Payment Date  
Purpose  
Sub Grade  
Term  
Verification Status  
Measure Names

Annual Income  
Average Interest Rate  
Avg DTI  
Dti  
Good Loan %  
Good loan Applications  
Good Loan Applications  
Good Loan Funded

Good Loan Amount Received

SUM(IF [Good Vs Bad] = 'Good Loan' Then [Total Payment] End)

The calculation is valid.

Apply OK

Data Source Overview Good Loan Issued Good Loan Applications % Good Loan Applications Good Loan Funded Good Loan Amount Received

This screenshot shows the Tableau Public interface with a dashboard titled 'Loan'. The top navigation bar includes File, Data, Worksheet, Dashboard, Analysis, Map, Format, and Help. A user profile 'kabba fatima ezzahra' is visible in the top right. The main workspace displays a data source named 'financial\_loan.Data' and a calculated field editor for 'Good Loan Amount Received'. The calculated field formula is: SUM(IF [Good Vs Bad] = 'Good Loan' Then [Total Payment] End). A tooltip indicates the calculation is valid. The bottom navigation bar lists several other measures: Annual Income, Average Interest Rate, Avg DTI, Dti, Good Loan %, Good loan Applications, Good Loan Applications, and Good Loan Funded. The 'Good Loan Amount Received' field is currently selected. The overall interface is clean with a dark header and light body.

# Dashboard

Loan (Tableau Public)

File Data Worksheet Dashboard Analysis Map Format Help

Publish kabba fatima ezzahra X

Show Me

Data Analytics < financial\_loan.Data

Search

- Last Credit Pull Date
- Last Payment Date
- Loan Status
- Member Id
- Next Payment Date
- Purpose
- Sub Grade
- Term
- Verification Status
- Measure Names
- Annual Income
- Average Interest Rate
- Avg DTI
- Dti
- Good Loan %
- Good Loan Amount Rec...
- Good loan Applications
- Good Loan Applications
- Good Loan Funded

Pages Columns Rows

Marks Automatic

Colour Size Text

Detail Tooltip

AGG(Good Loan Am...)

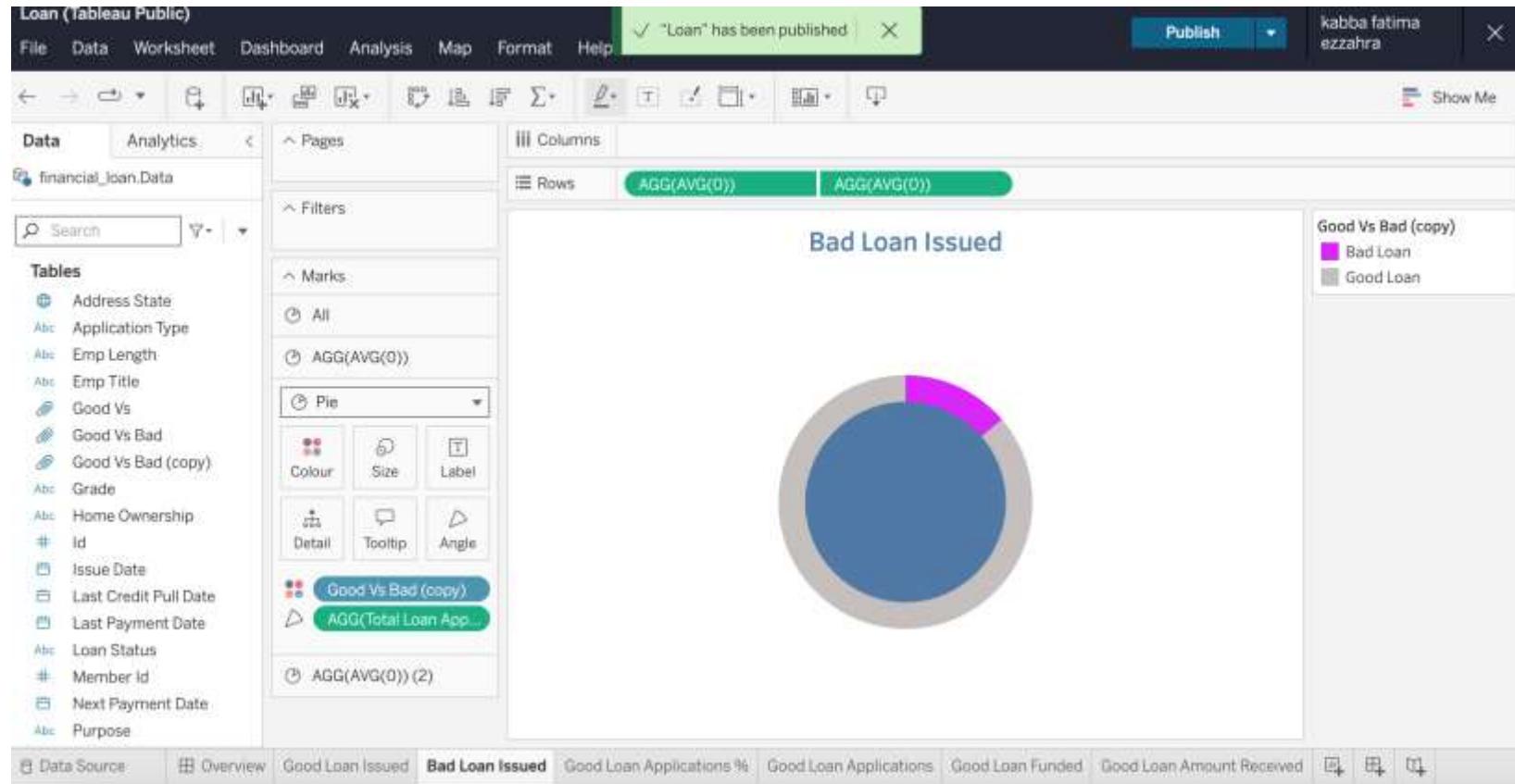
### Good Loan Amount Received

\$435.8M

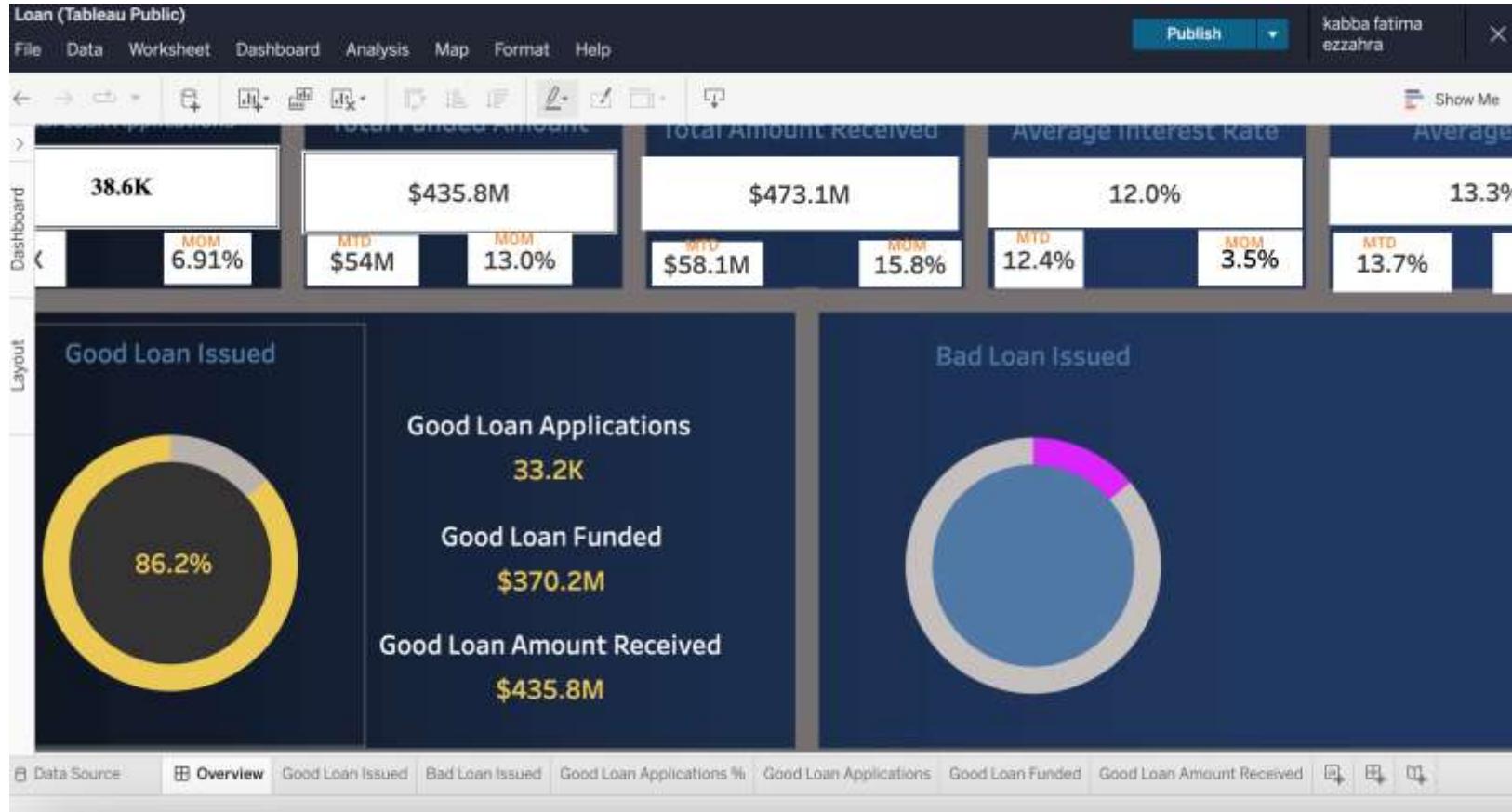
Data Source Overview Good Loan Issued Good Loan Applications % Good Loan Applications Good Loan Funded Good Loan Amount Received

1 mark 1 row by 1 column SUM of AGG(Good Loan Amount Received): \$435.8M

# Dashboard



# Dashboard



# Dashboard

Loan (Tableau Public)

File Data Worksheet Dashboard Analysis Map Format Help

Publish kabba fatima ezzahra

Show Me

Data Analytics

financial\_loan.Data

Search

Tables

- Address State
- Application Type
- Emp Length
- Emp Title
- Good Vs
- Good Vs Bad
- Good Vs Bad (copy)
- Grade
- Home Ownership
- # Id
- Issue Date
- Last Credit Pull Date
- Last Payment Date
- Loan Status
- # Member Id
- Next Payment Date
- Abs: Purpose

Bad loan %

```
COUNT(IF [Good Vs Bad] = 'Bad Loan' THEN [Id] END) /COUNT({Id})
```

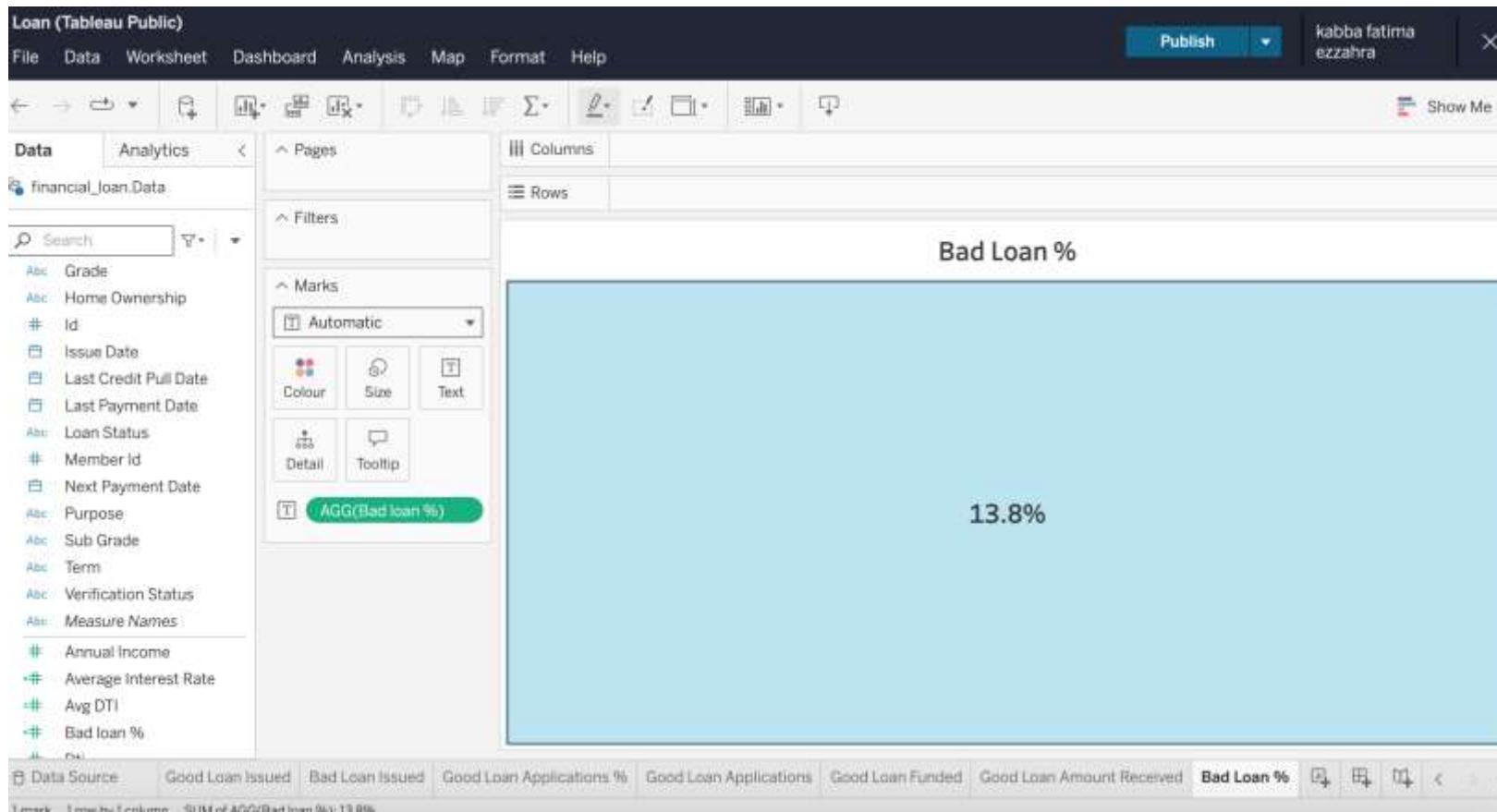
The calculation is valid.

Apply OK

Data Source: Good Loan Issued Bad Loan Issued Good Loan Applications% Good Loan Applications Good Loan Funded Good Loan Amount Received Bad Loan %

This screenshot shows the Tableau Public interface with a dashboard titled 'Loan'. The top navigation bar includes File, Data, Worksheet, Dashboard, Analysis, Map, Format, and Help. A user profile 'kabba fatima ezzahra' is visible on the right. The main workspace displays a list of tables and a calculated field editor. The calculated field 'Bad loan %' is defined as  $\text{COUNT}(\text{IF } [\text{Good Vs Bad}] = \text{'Bad Loan'} \text{ THEN } [\text{Id}] \text{ END}) / \text{COUNT}([\text{Id}])$ . A message at the bottom of the editor window states 'The calculation is valid.' with 'Apply' and 'OK' buttons. At the bottom of the screen, there is a row of data source cards: Good Loan Issued, Bad Loan Issued, Good Loan Applications%, Good Loan Applications, Good Loan Funded, Good Loan Amount Received, and Bad Loan %. The 'Bad Loan %' card is currently selected.

# Dashboard



# Dashboard

Loan (Tableau Public)

File Data Worksheet Dashboard Analysis Map Format Help

Publish kabba fatima ezzahra X

Data Analytics < financial\_loan.Data

Search ▾

ABC Home Ownership  
# Id  
□ Issue Date  
□ Last Credit Pull Date  
□ Last Payment Date  
ABC Loan Status  
# Member Id  
□ Next Payment Date  
ABC Purpose  
ABC Sub Grade  
ABC Term  
ABC Verification Status  
ABC Measure Names  
# Annual Income  
# Average Interest Rate  
# Avg DTI  
# Bad loan %  
# Bad Loan Applications

Bad Loan Applications

COUNT{IF [Good Vs Bad] = 'Bad Loan' THEN [Id] END}

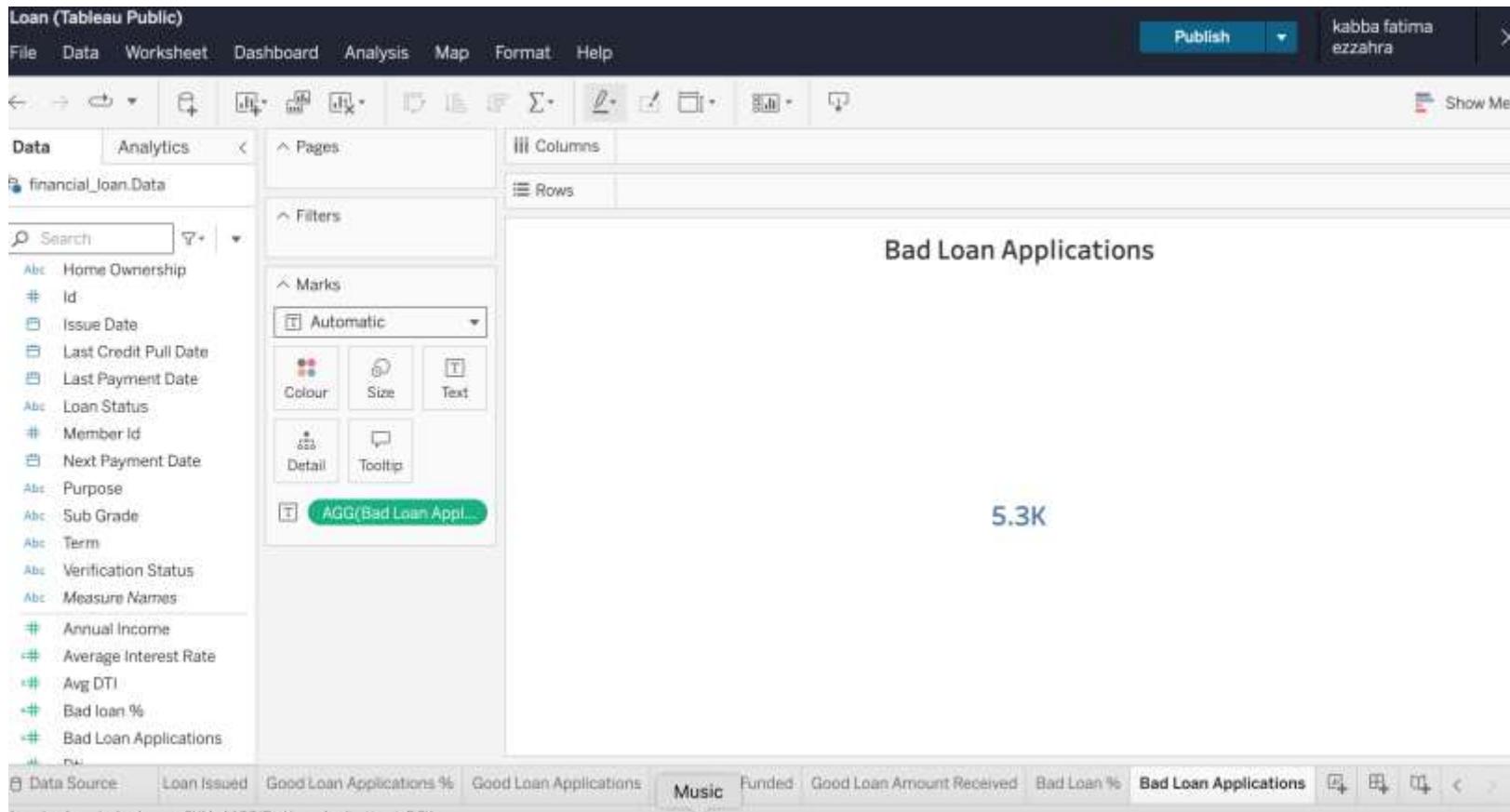
The calculation is valid.

Apply OK

Data Source Loan Issued Good Loan Applications % Good Loan Applications Good Loan Funded Good Loan Amount Received Bad Loan % Bad Loan Applications

This screenshot shows the Tableau Public interface. The top navigation bar includes File, Data, Worksheet, Dashboard, Analysis, Map, Format, and Help. A user profile 'kabba fatima ezzahra' is visible in the top right. The main workspace shows a data source named 'financial\_loan.Data'. On the left, a search bar and a list of fields are displayed, with 'Bad Loan Applications' highlighted. A modal window titled 'Bad Loan Applications' contains the calculated field formula: COUNT{IF [Good Vs Bad] = 'Bad Loan' THEN [Id] END}. Below the formula, a message says 'The calculation is valid.' with 'Apply' and 'OK' buttons. At the bottom, several dashboard cards are partially visible, including 'Good Loan Applications %', 'Good Loan Applications', 'Good Loan Funded', 'Good Loan Amount Received', 'Bad Loan %', and 'Bad Loan Applications'.

# Dashboard



# Dashboard

Loan (Tableau Public)

File Data Worksheet Dashboard Analysis Map Format Help

Publish kabba fatima ezzahra X

Show Me

Data Analytics < ^ Pages Columns Rows

financial\_loan.Data

Search

Home Ownership  
Id  
Issue Date  
Last Credit Pull Date  
Last Payment Date  
Loan Status  
Member Id  
Next Payment Date  
Purpose  
Sub Grade  
Term  
Verification Status  
Measure Names  
Annual Income  
Average Interest Rate  
Avg DTI  
Bad loan %  
Bad Loan Applications  
Bad Loan Total Funded Amount

Bad Loan Total Funded Amount

SUM {IF [Good Vs Bad] = 'Bad Loan' THEN [Loan Amount] END}

Colour Size Detail Tooltip

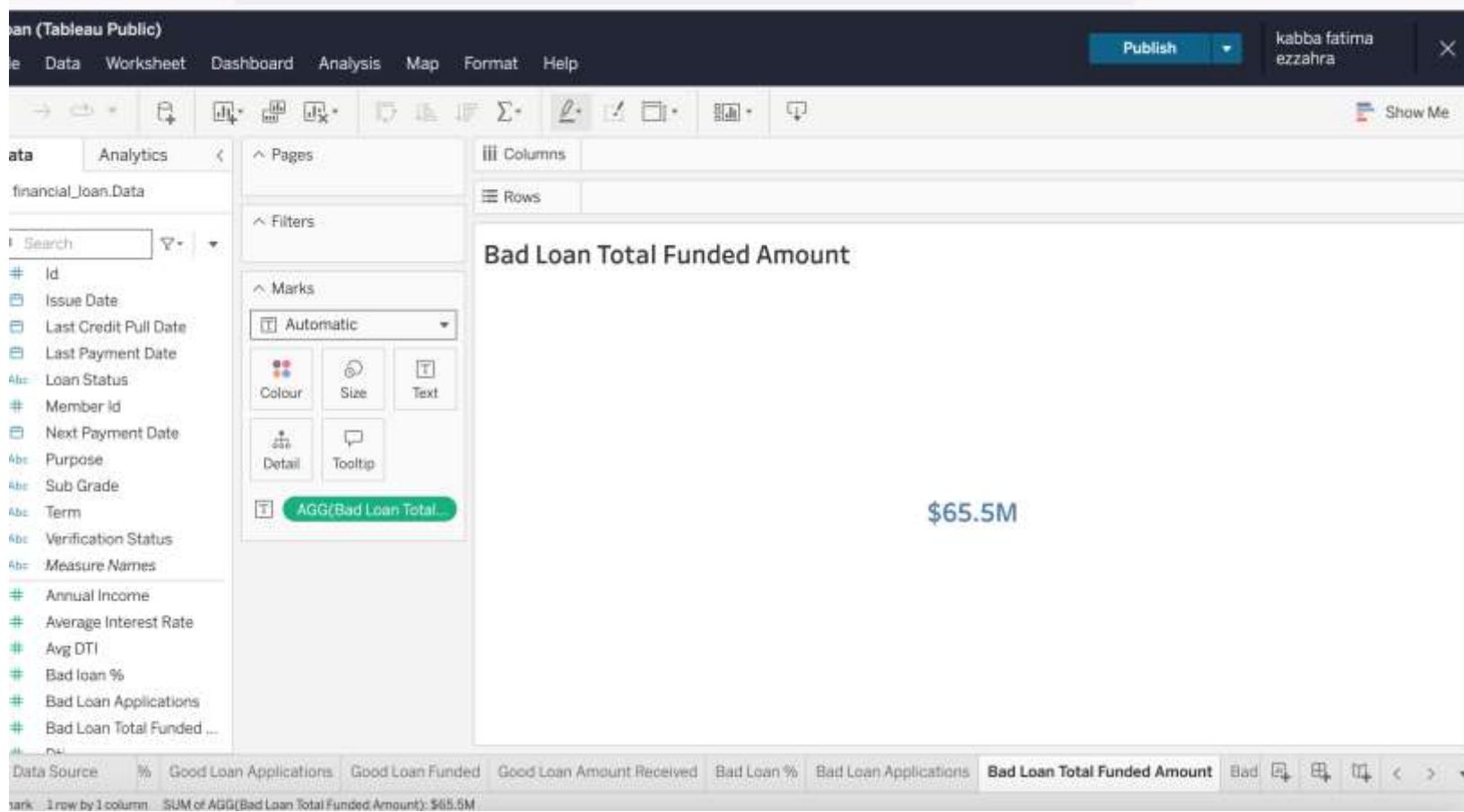
The calculation is valid.

Apply OK

Data Source Good Loan Applications Good Loan Funded Good Loan Amount Received Bad Loan % Bad Loan Applications Bad Loan Total Funded Amount

This screenshot shows the Tableau Public interface with a dashboard titled 'Loan (Tableau Public)'. The top navigation bar includes File, Data, Worksheet, Dashboard, Analysis, Map, Format, and Help. A user profile 'kabba fatima ezzahra' is visible in the top right. The main workspace displays a list of fields from a data source named 'financial\_loan.Data'. A modal window is open, showing a calculated field named 'Bad Loan Total Funded Amount' with the formula: SUM {IF [Good Vs Bad] = 'Bad Loan' THEN [Loan Amount] END}. The modal also includes tabs for Marks (Automatic), Colour, Size, Detail, and Tooltip, and buttons for Apply and OK. Below the modal, a message states 'The calculation is valid.' At the bottom of the screen, a row of buttons corresponds to the fields listed in the sidebar: Data Source, Good Loan Applications, Good Loan Funded, Good Loan Amount Received, Bad Loan %, Bad Loan Applications, and Bad Loan Total Funded Amount.

# Dashboard



# Dashboard

Loan (Tableau Public)

File Data Worksheet Dashboard Analysis Map Format Help

Publish kabba fatima ezzahra X

Show Me

Data Analytics < Pages Columns Rows

financial\_loan.Data

Search

# Id  
Issue Date  
Last Credit Pull Date  
Last Payment Date  
Loan Status  
Member Id  
Next Payment Date  
Purpose  
Sub Grade  
Term  
Verification Status  
Measure Names

# Annual Income  
# Average Interest Rate  
# Avg DTI  
# Bad loan %  
# Bad Loan Applications  
# Bad Loan Total Funded ...

Marks Automatic

Bad Loan Amount Received

SUM{IF [Good Vs Bad]='Bad Loan' THEN [Total Payment] END}

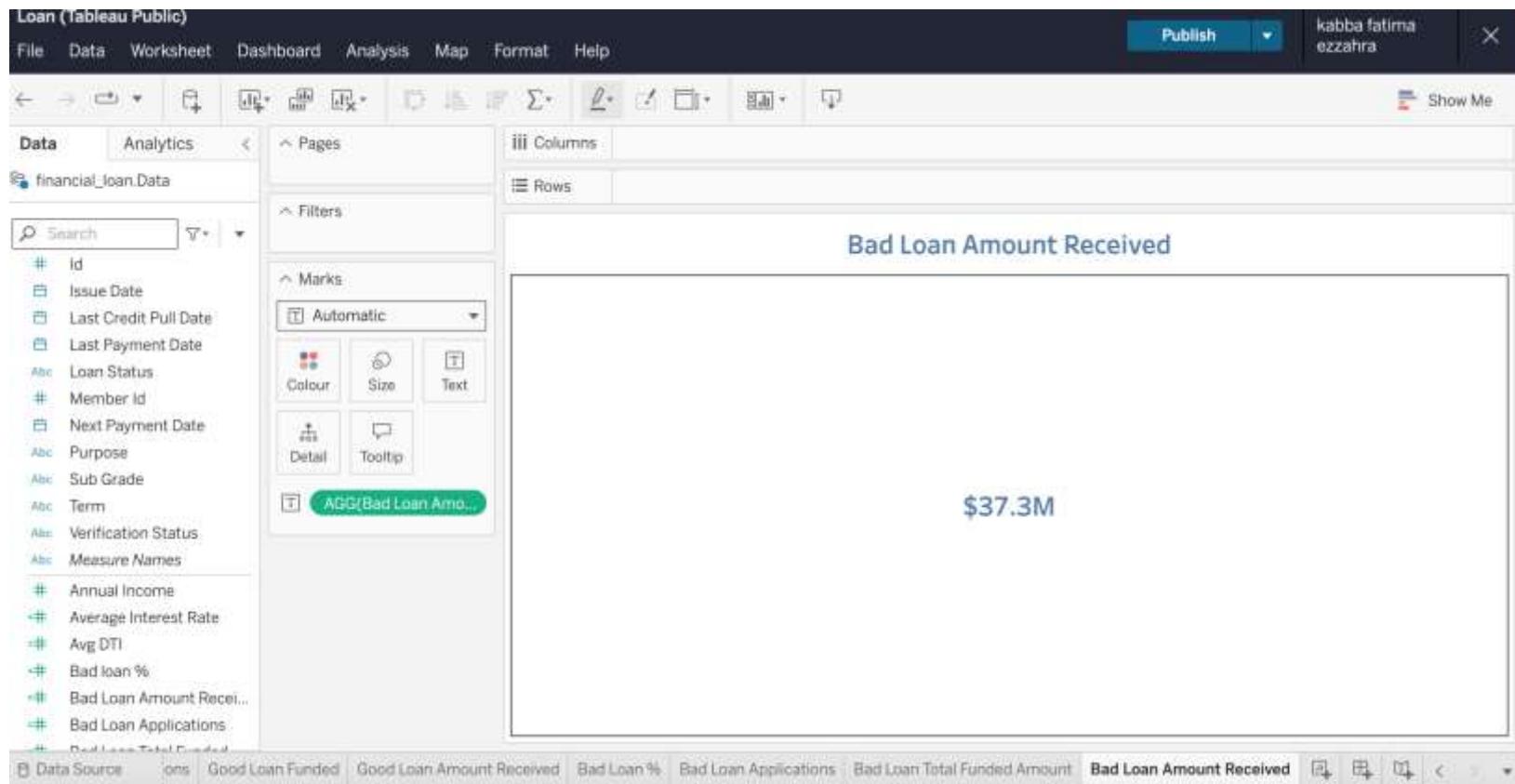
The calculation is valid.

Apply OK

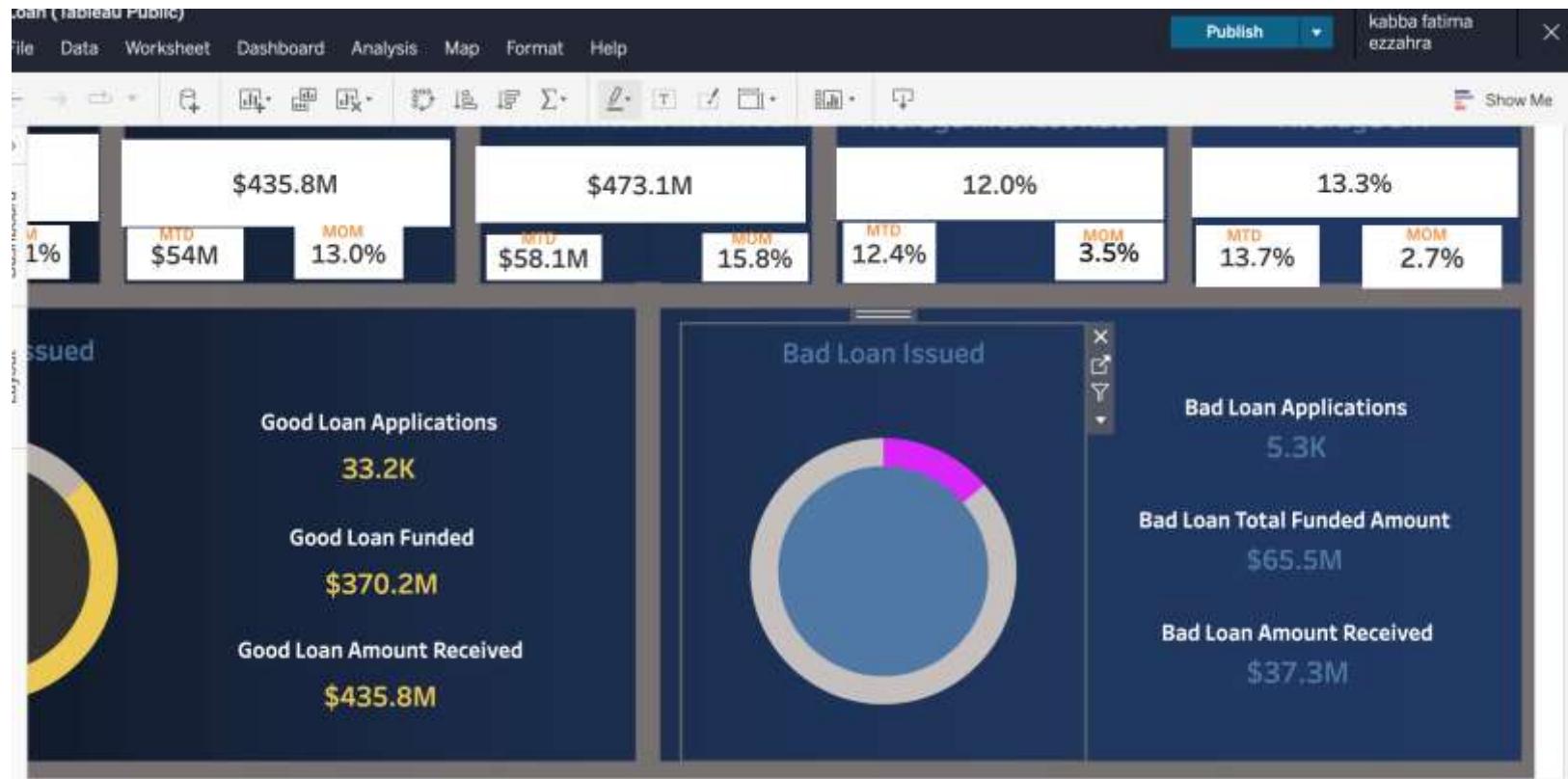
Data Source Good Loan Funded Good Loan Amount R Photos Bad Loan % Bad Loan Applications Bad Loan Total Funded Amount Bad Loan Amount Received

This screenshot shows a Tableau dashboard titled 'Loan (Tableau Public)'. The interface includes a top navigation bar with File, Data, Worksheet, Dashboard, Analysis, Map, Format, and Help options, along with a Publish button and user information. Below the navigation is a toolbar with various icons. The main workspace displays a data source named 'financial\_loan.Data' and a calculated field editor for 'Bad Loan Amount Received'. The calculated field formula is: SUM{IF [Good Vs Bad]='Bad Loan' THEN [Total Payment] END}. A message at the bottom of the editor states 'The calculation is valid.' with Apply and OK buttons. At the bottom of the screen, there is a row of data source cards.

# Dashboard



# Dashboard



# Dashboard

Loan (Tableau Public)

File Data Worksheet Dashboard Analysis Map Format Help

Publish kabba fatima ezzahra X

Show Me

Data Analytics < Pages Columns Measure Names

financial\_loan.Data Rows Loan Status

Search ▾

Measure Names

Abs: Purpose  
Abs: Sub Grade  
Abs: Term  
Abs: Verification Status  
Abs: Measure Names  
# Annual Income  
# Average Interest Rate  
# Avg DTI  
# Bad Loan %  
# Bad Loan Amount Rece...  
# Bad Loan Applications  
# Bad Loan Total Funded ...  
# DtI  
# Good Loan %  
# Good Loan Amount Rec...  
# Good loan Applications  
# Good Loan Applications  
# Good Loan Funded

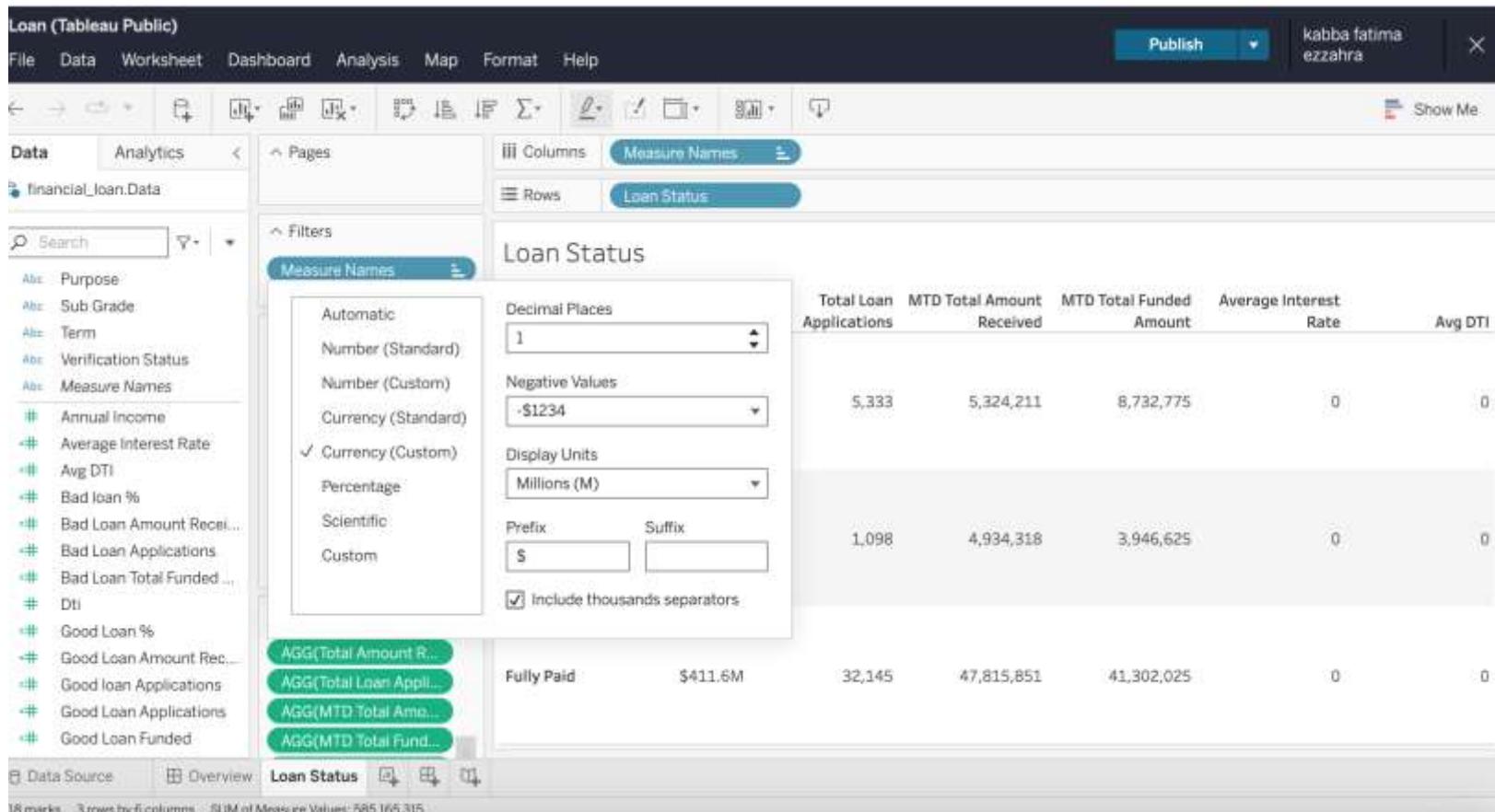
Automatic Decimal Places 1  
Number (Standard)  
Number (Custom) Negative Values -\$1234  
Currency (Standard)  
✓ Currency (Custom) Display Units Millions (M)  
Percentage  
Scientific  
Custom Prefix \$ Suffix  
 Include thousands separators

Loan Status

| Total Loan Applications | MTD Total Amount Received | MTD Total Funded Amount | Average Interest Rate | Avg DTI    |
|-------------------------|---------------------------|-------------------------|-----------------------|------------|
| 5,333                   | 5,324,211                 | 8,732,775               | 0                     | 0          |
| 1,098                   | 4,934,318                 | 3,946,625               | 0                     | 0          |
| Fully Paid              | \$411.6M                  | 32,145                  | 47,815,851            | 41,302,025 |

Data Source Overview Loan Status

18 marks... 3 rows by 6 columns... SUM of Measure Values: 585,165,315



This screenshot shows a Tableau Public dashboard titled 'Loan (Tableau Public)'. The interface includes a top navigation bar with File, Data, Worksheet, Dashboard, Analysis, Map, Format, and Help options. On the right, there's a user profile for 'kabba fatima ezzahra' with a publish button and a close icon. Below the navigation is a toolbar with various icons for data manipulation. The main workspace is divided into sections: 'Data' (containing 'financial\_loan.Data'), 'Analytics' (with a search bar), 'Pages' (selected), 'Columns' (highlighted in blue), 'Measure Names' (selected), 'Rows' (highlighted in blue), and 'Loan Status' (selected). A 'Filters' section is open, showing settings for 'Measure Names' like decimal places (1), negative values (-\$1234), and display units (Millions M). The 'Loan Status' section displays three rows of data in a table format. The first row has 5,333 applications, 5,324,211 received amount, and 8,732,775 funded amount, both at 0% interest and 0 avg DTI. The second row has 1,098 applications, 4,934,318 received amount, and 3,946,625 funded amount, also at 0% interest and 0 avg DTI. The third row is labeled 'Fully Paid' with a value of \$411.6M, 32,145 applications, 47,815,851 received amount, and 41,302,025 funded amount, all at 0% interest and 0 avg DTI. At the bottom, there are tabs for Data Source, Overview, and Loan Status, along with a note about 18 marks, 3 rows by 6 columns, and a sum of 585,165,315.

# Dashboard

Loan (Tableau Public)

File Data Worksheet Dashboard Analysis Map Format Help

Publish kabba fatima ezzahra X

Show Me

Data Analytics < Pages Measure Names

financial\_loan.Data

Search

Term Verification Status Measure Names Annual Income Average Interest Rate Avg DTI Bad loan % Bad Loan Amount Received Bad Loan Applications Bad Loan Total Funded Dti Good Loan % Good Loan Amount Rec Good loan Applications Good Loan Applications Good Loan Funded Installment Int Rate

Filters &middot; 1

Marks

Measure Values

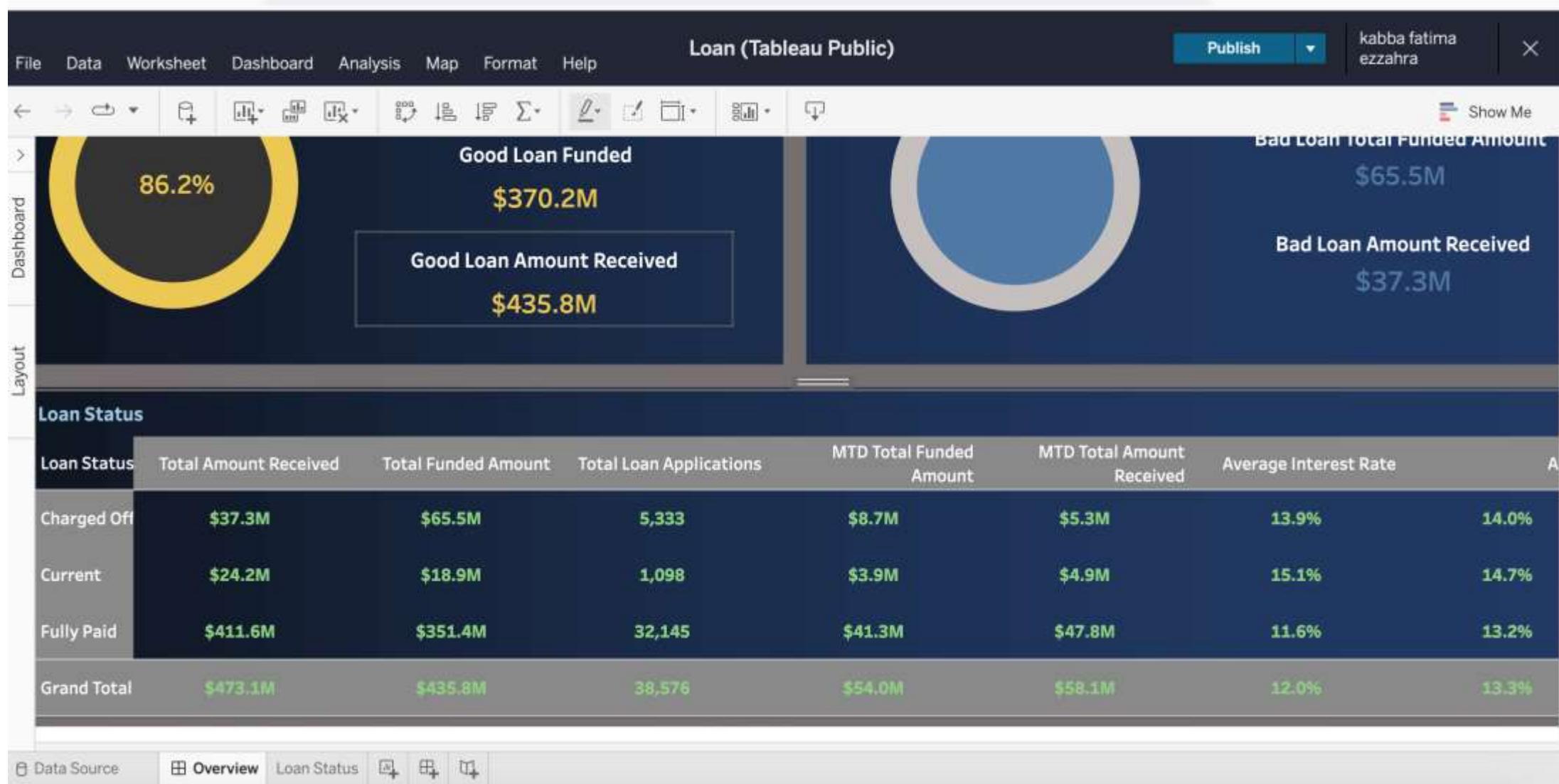
AGG(Total Amount Rec... AGG(Total Funded Amou... AGG(Total Loan Applicat... AGG(MTD Total Funded ... AGG(MTD Total Amount ... AGG(Average Interest Ra... AGG(Avg DTI)

Loan Status

| Loan Status | Total    | Total     | Total     | MTD       | MTD       | Average   |
|-------------|----------|-----------|-----------|-----------|-----------|-----------|
|             | Amount.. | Funded .. | Loan Ap.. | Total F.. | Total A.. | Interes.. |
| Charged Off | \$37.3M  | \$65.5M   | 5,333     | \$8.7M    | \$5.3M    | 13.9%     |
| Current     | \$24.2M  | \$18.9M   | 1,098     | \$3.9M    | \$4.9M    | 15.1%     |
| Fully Paid  | \$411.6M | \$351.4M  | 32,145    | \$41.3M   | \$47.8M   | 11.6%     |
|             |          |           |           |           |           | 13.2%     |

Data Source Overview Loan Status

# Dashboard



# BANK LOAN REPORT | SUMMARY

Total Loan Applications

**38.6K**

**4.3K**

MOM  
6.91%

Total Funded Amount

**\$435.8M**

MTD  
\$54M

MOM  
13.0%

Total Amount Received

**\$473.1M**

MTD  
\$58.1M

MOM  
15.8%

Average Interest Rate

**12.0%**

MTD  
12.4%

MOM  
3.5%

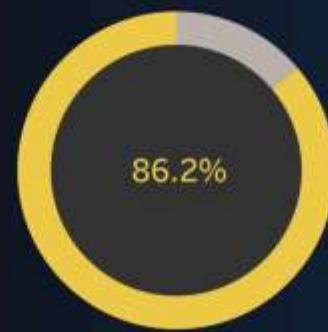
Average DTI

**13.3%**

MTD  
13.7%

MOM  
2.7%

Good Loan Issued



Good Loan Applications

**33.2K**

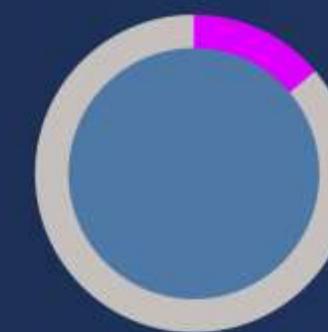
Good Loan Funded

**\$370.2M**

Good Loan Amount Received

**\$435.8M**

Bad Loan Issued



Bad Loan Applications

**5.3K**

Bad Loan Total Funded Amount

**\$65.5M**

Bad Loan Amount Received

**\$37.3M**

Loan Status

| Loan Status | Total Amount Received | Total Funded Amount | Total Loan Applications | MTD Total Funded Amount | MTD Total Amount Received | Average Interest Rate | Avg DTI      |
|-------------|-----------------------|---------------------|-------------------------|-------------------------|---------------------------|-----------------------|--------------|
| Charged Off | \$37.3M               | \$65.5M             | 5,333                   | \$8.7M                  | \$5.3M                    | 13.9%                 | 14.0%        |
| Current     | \$24.2M               | \$18.9M             | 1,098                   | \$3.9M                  | \$4.9M                    | 15.1%                 | 14.7%        |
| Fully Paid  | \$411.6M              | \$351.4M            | 32,145                  | \$41.3M                 | \$47.8M                   | 11.6%                 | 13.2%        |
| Grand Total | <b>\$473.1M</b>       | <b>\$435.8M</b>     | <b>38,576</b>           | <b>\$54.0M</b>          | <b>\$58.1M</b>            | <b>12.0%</b>          | <b>13.3%</b> |

# Overview

Loan (Tableau Public)

File Data Worksheet Dash

Data Analytics

financial\_Joan.Data

Search

- Address State
- Application Type
- Emp Length
- Emp Title
- Good Vs
- Good Vs Bad
- Good Vs Bad (copy)
- Grade
- Home Ownership
- Id
- Issue Date
- Last Credit Pull Date
- Last Payment Date
- Loan Status
- Member Id
- Next Payment Date
- Purpose
- Sub Grade
- Term

12 marks 1 row by 12 columns

Create Parameter

Name: kabba fatima ezzahra

Select Measure:

Properties

Data type: String

Display format: Total Loan Applications

Current value: Total Loan Applications

Value when workbook opens: Current value

Allowable values

All  List  Range

| Value                   | Display As              |
|-------------------------|-------------------------|
| Total Loan Applications | Total Loan Applications |
| Total Funded Amount     | Total Funded Amount     |
| Total Amount Received   | Total Amount Received   |
| Click to add            |                         |

Fixed  
 When workbook opens

Add values from ▾

Remove Selected

Show Me

Sept.. Octob.. Nove.. Dece..

Abc Abc Abc Abc

# Overview

Loan (Tableau Public)

File Data Worksheet Dashboard Analysis Map Format ... Publish kabba fatima ezzahra X

Show Me

Data Analytics < financial\_loan.Data

Search ▾

- Address State
- Application Type
- Emp Length
- Emp Title
- Good Vs
- Good Vs Bad
- Good Vs Bad (copy)
- Grade
- Home Ownership
- Id
- Issue Date
- Last Credit Pull Date
- Last Payment Date
- Loan Status
- Member Id

Parameters Select Measure

Pages ▾

Columns MONTH(Issue Date)

Rows

Month

Issue Date

| Janua.. | Febru.. | March | April | May | June | July | August | Sept.. | Octob.. | Nove.. | Dece.. |
|---------|---------|-------|-------|-----|------|------|--------|--------|---------|--------|--------|
| Abc     | Abc     | Abc   | Abc   | Abc | Abc  | Abc  | Abc    | Abc    | Abc     | Abc    | Abc    |

Data Source Summary Overview Month

# Overview

Loan (Tableau Public)

File Data Worksheet Dashboard Analysis Map Format ...

Publish kabba fatima ezzahra

Data Analytics < financial\_loan.Data

Show Me

Pages Columns MONTH(issue Date)

Rows

Search

Filters:

Dynamic Measure:

```
IF [Select Measure] = 'Total Loan Applications' THEN [Total Loan Applications]
ELSEIF [Select Measure] = 'Total Funded Amount' THEN [Total Funded Amount]
ELSEIF [Select Measure] = 'Total Amount Received' THEN [Total Amount Received]
END
```

Select Measure: Total Loan Applications

The calculation is valid.

Apply OK

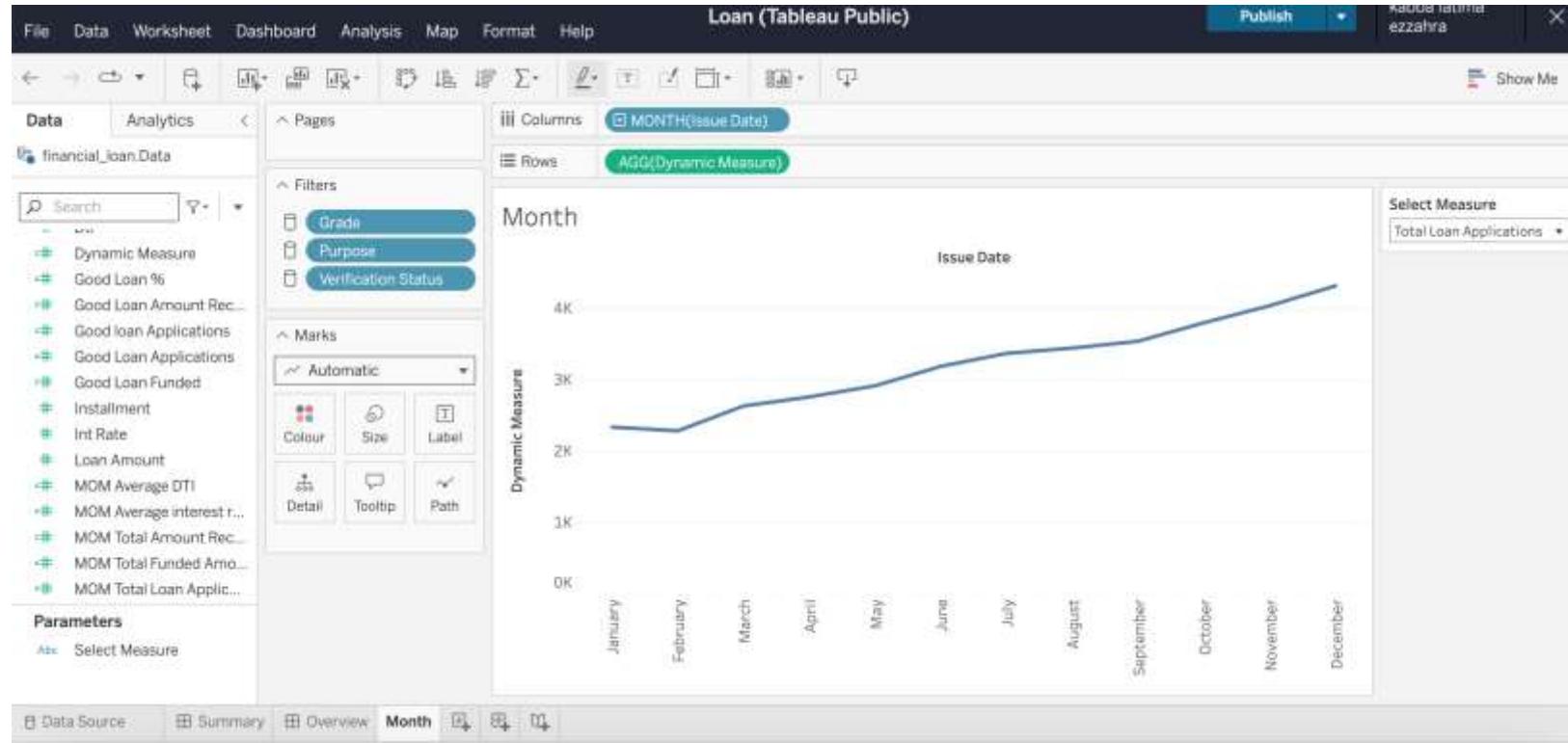
Parameters: Select Measure

Data Source Summary Overview Month

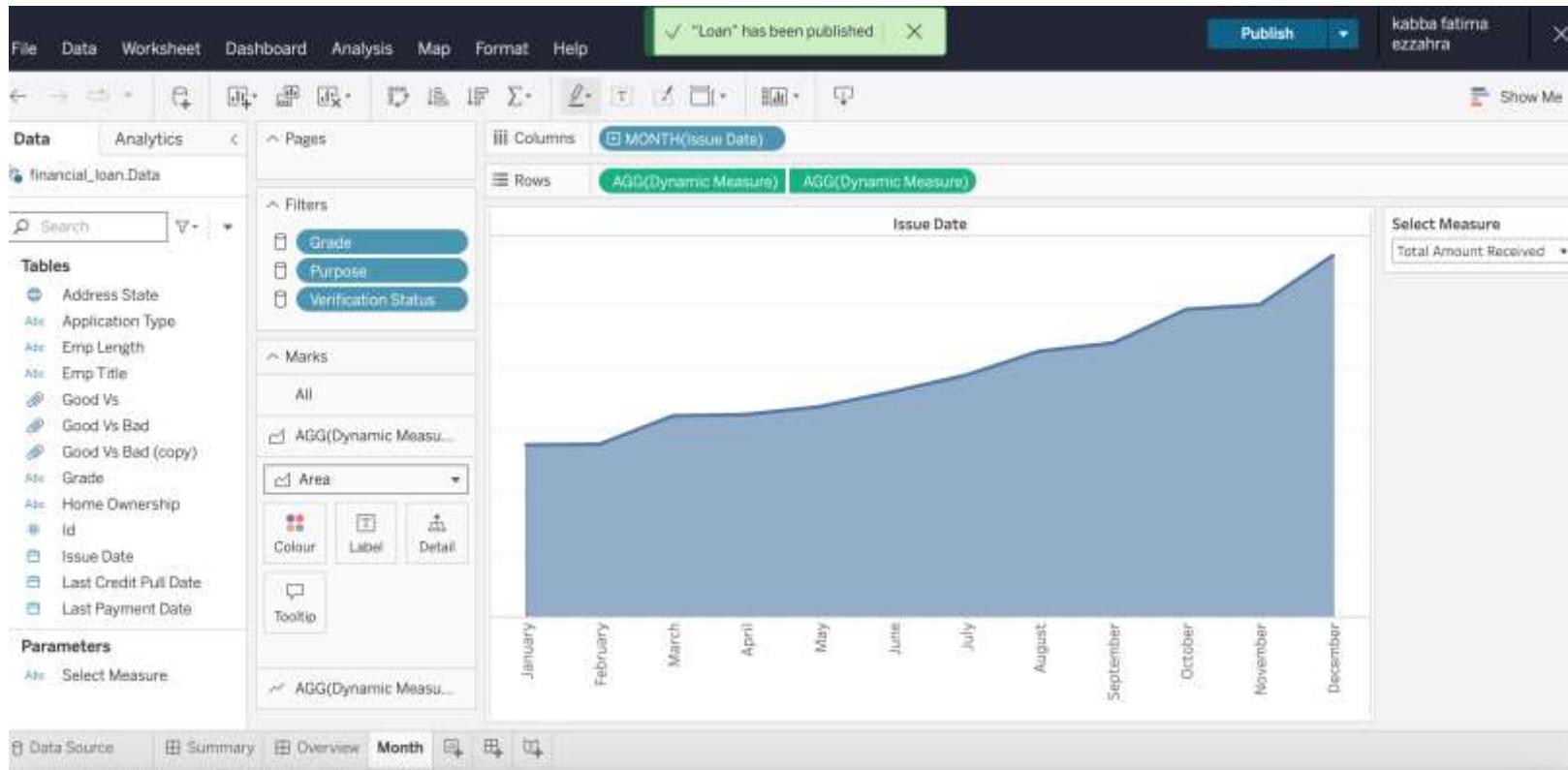
12 marks 1 row by 12 columns

A screenshot of the Tableau Public interface. The main window shows a data source named 'financial\_loan.Data'. A 'Dynamic Measure' dialog box is open, displaying a conditional formula. The formula uses an IF statement to check the value of '[Select Measure]'. If it's 'Total Loan Applications', it returns '[Total Loan Applications]'. If it's 'Total Funded Amount', it returns '[Total Funded Amount]'. If it's 'Total Amount Received', it returns '[Total Amount Received]'. The formula ends with an END statement. To the right of the formula, there's a 'Select Measure' dropdown set to 'Total Loan Applications'. Below the formula, a message says 'The calculation is valid.' with 'Apply' and 'OK' buttons. The top navigation bar includes File, Data, Worksheet, Dashboard, Analysis, Map, Format, and Publish. The top right corner shows the user 'kabba fatima ezzahra'. The bottom of the screen shows the data source summary and a note about 12 marks (1 row by 12 columns).

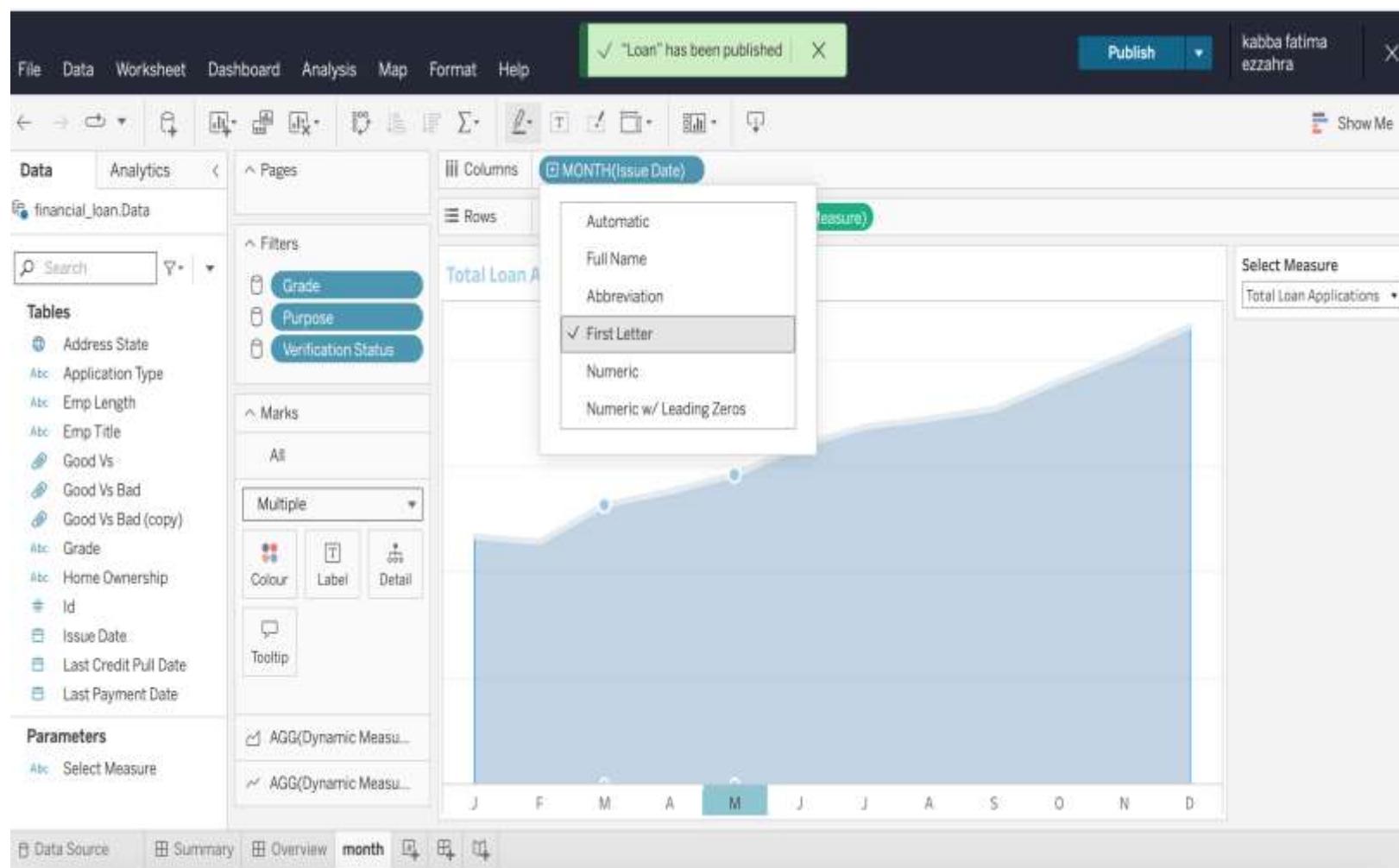
# Dashboard



# Dashboard



# Dashboard



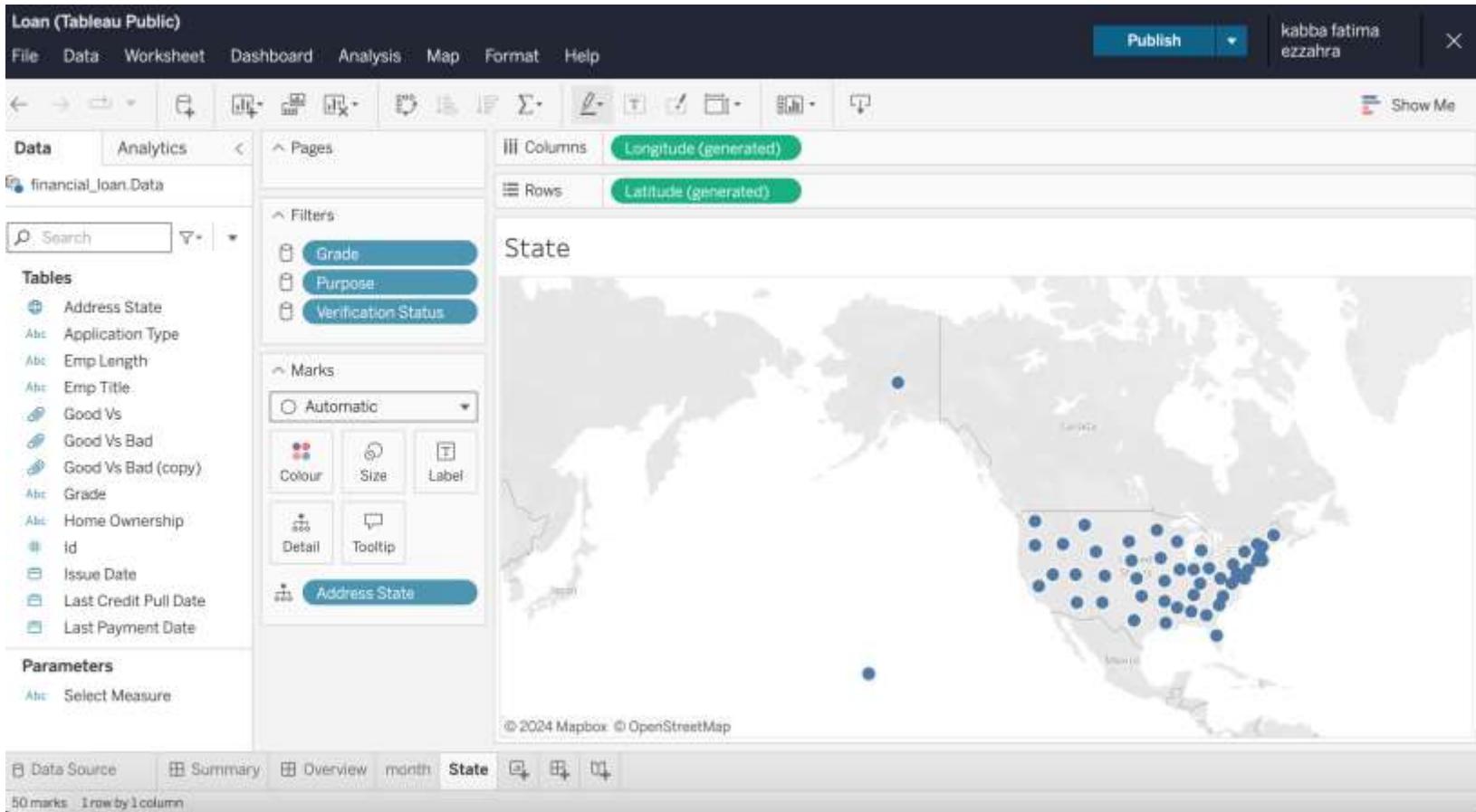
# Dashboard

The screenshot shows a dashboard editing interface with a floating panel titled "Dynamic Measure". The panel contains the following fields:

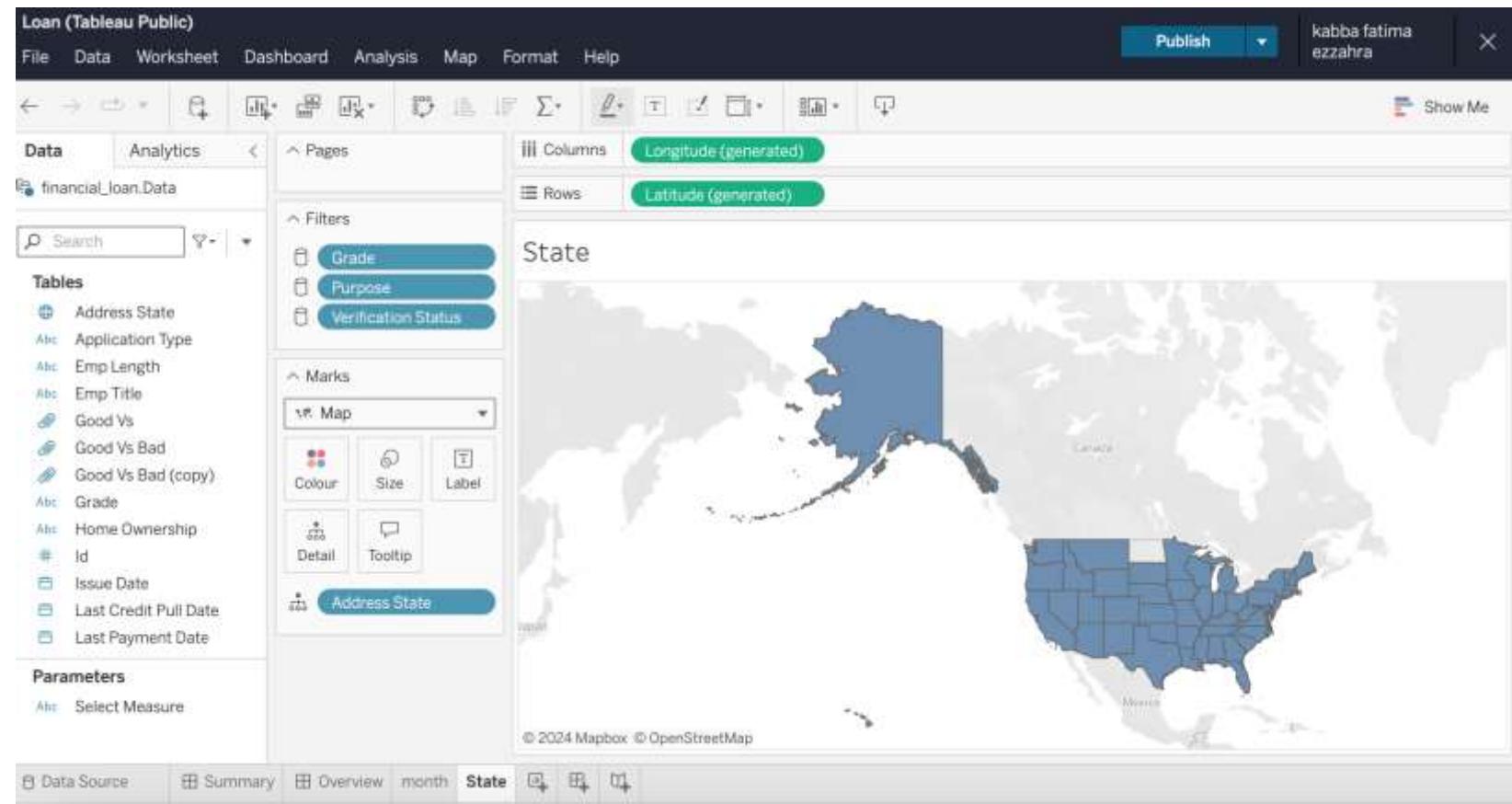
- Select Measure: Total Loan Applications
- Grade: (All)
- Verification Status: (All)
- Purpose: (All)

The dashboard itself has a dark blue background with a grid overlay. A green notification bar at the top right says "✓ 'Loan' has been published". The left sidebar includes sections for Device Preview, Size (PowerPoint 1600 x 900), Sheets (month, Total Loan Applications, MTD Total Loan Applications), and Objects (Horizontal Container, Vertical Container, Text, Extension, Image, Blank). The Floating tab is selected in the bottom-left corner of the sidebar.

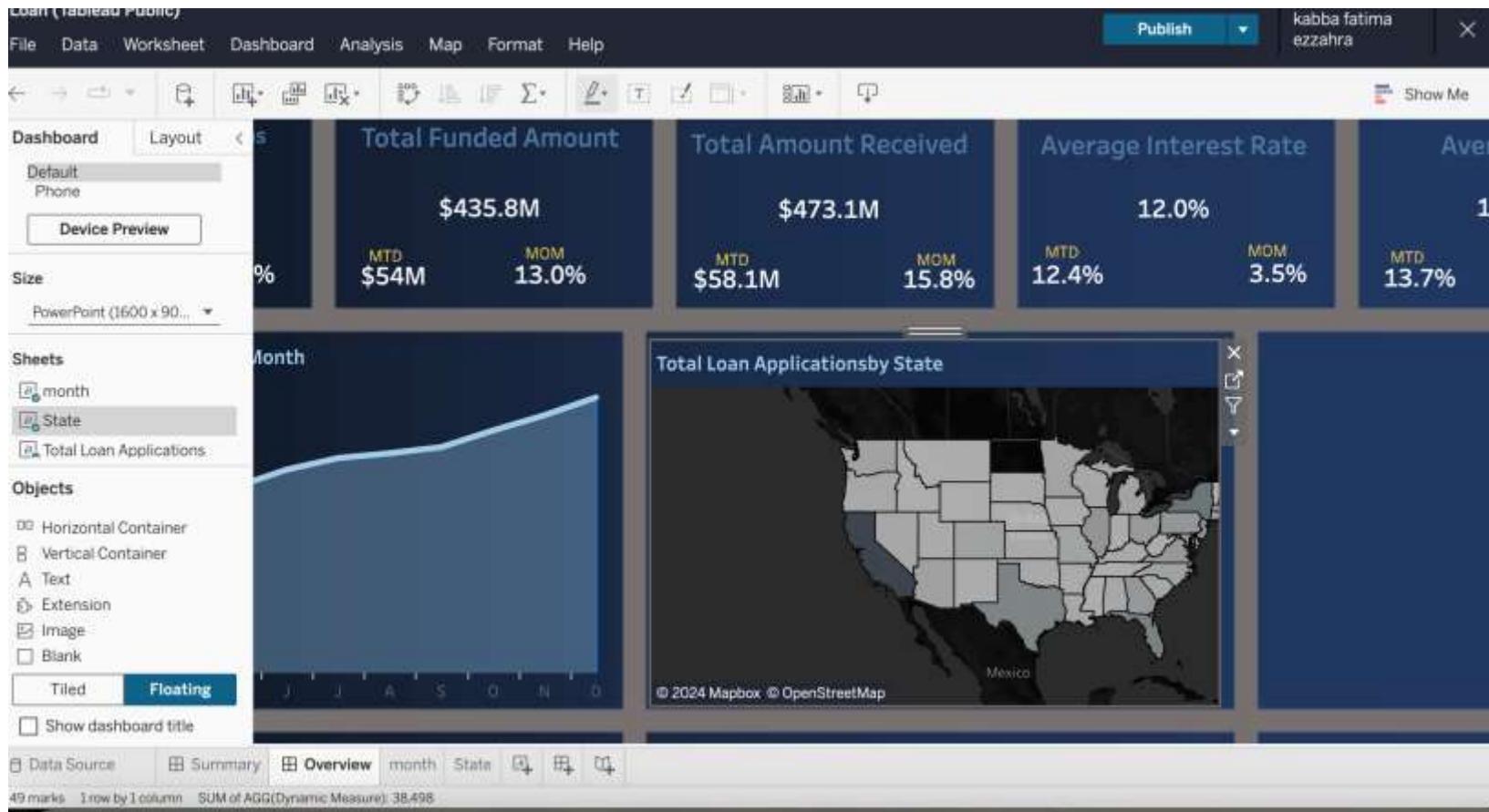
# Dashboard



# Dashboard



# Dashboard



# Dashboard

Loan (Tableau Public)

File Data Worksheet Dashboard Analysis Map Format Help

Publish ▼ kabba fatima ezzahra X

Show Me

Data Analytics < financial\_loan.Data

Search ▼

- Bad loan %
- Bad Loan Amount Rec...
- Bad Loan Applications
- Bad Loan Total Funded ...
- Dti
- Dynamic Measure
- Good Loan %
- Good Loan Amount Rec...
- Good loan Applications
- Good Loan Applications
- Good Loan Funded
- Installment
- Int Rate
- Loan Amount

Parameters Select Measure

Pages Columns Rows AGG(AVG(0))

Filters Grade Purpose Verification Status

Marks Pie

- Colour
- Size
- Label
- Detail
- Tooltip
- Angle

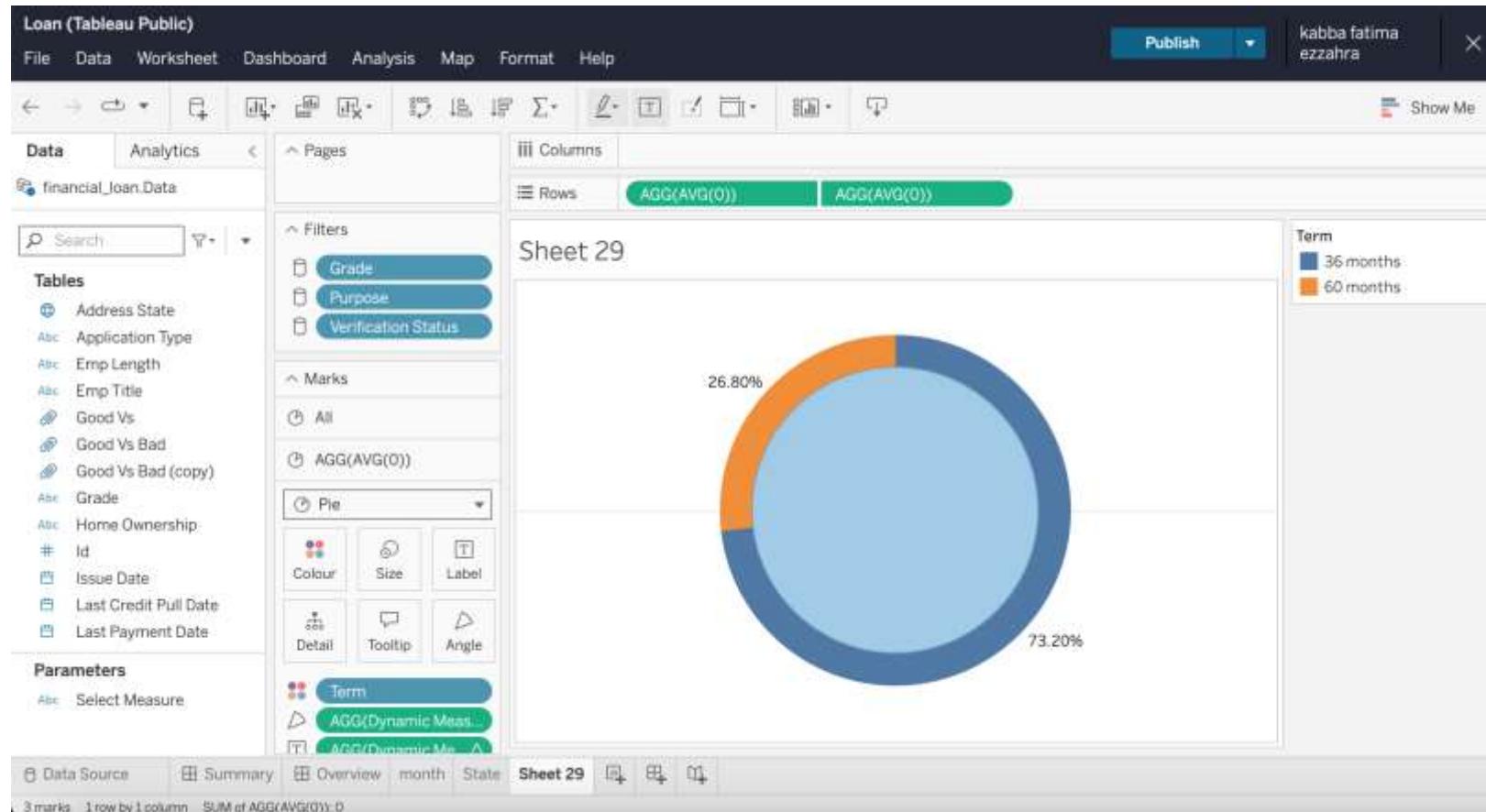
Term 36 months 60 months

Avg(0) 0

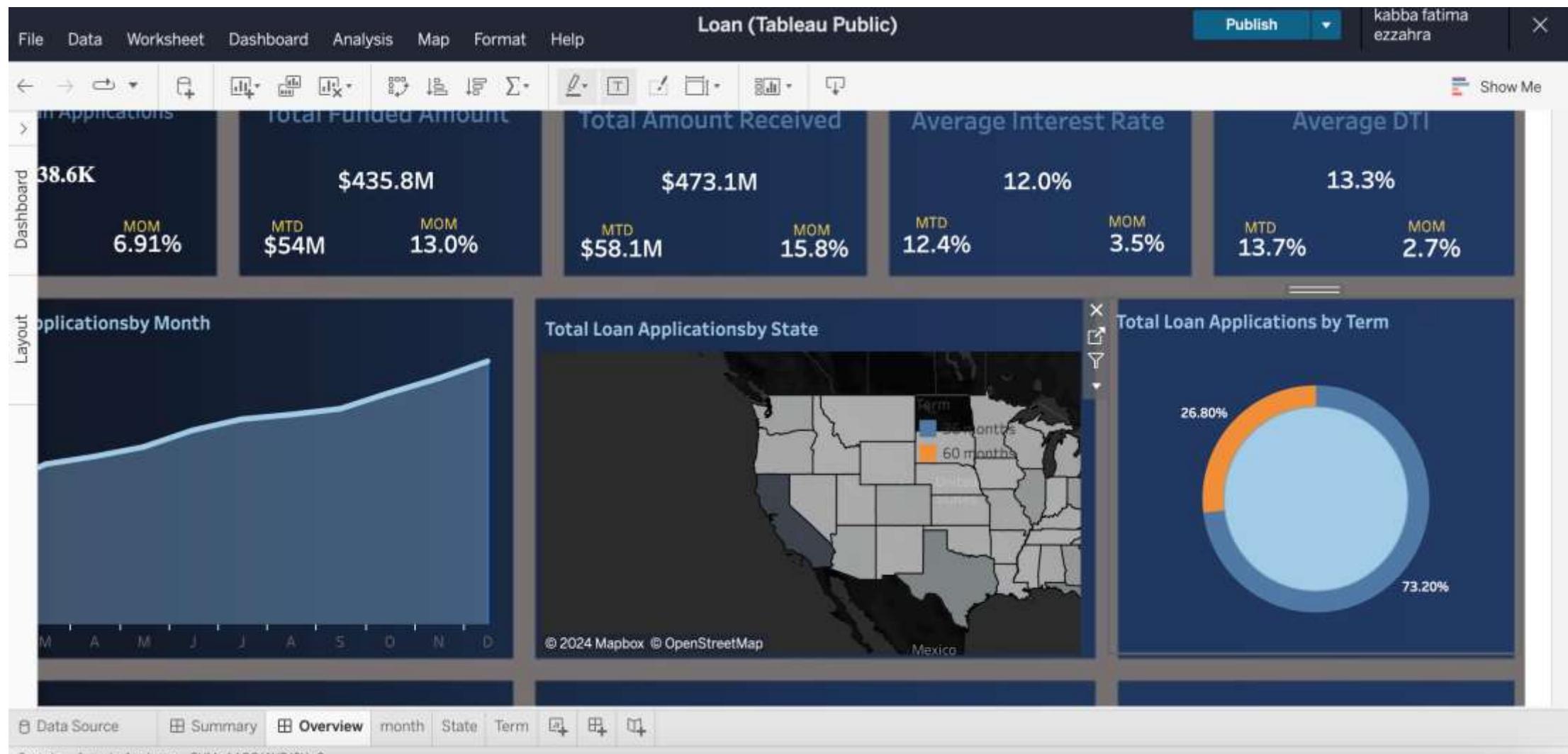
Sheet 29

2 marks 1 row by 1 column SUM of AGG(AVG(0)): 0

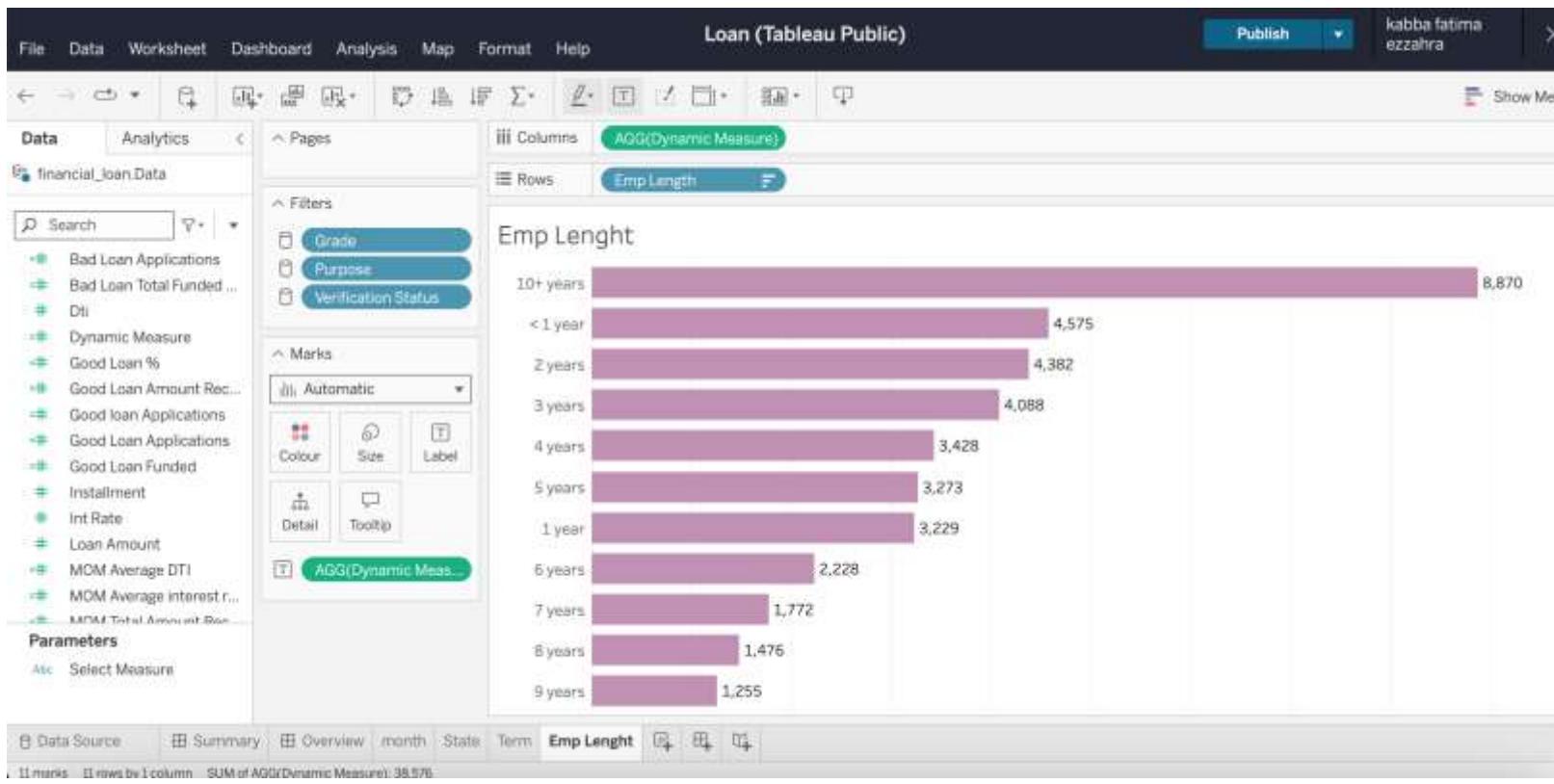
# Dashboard

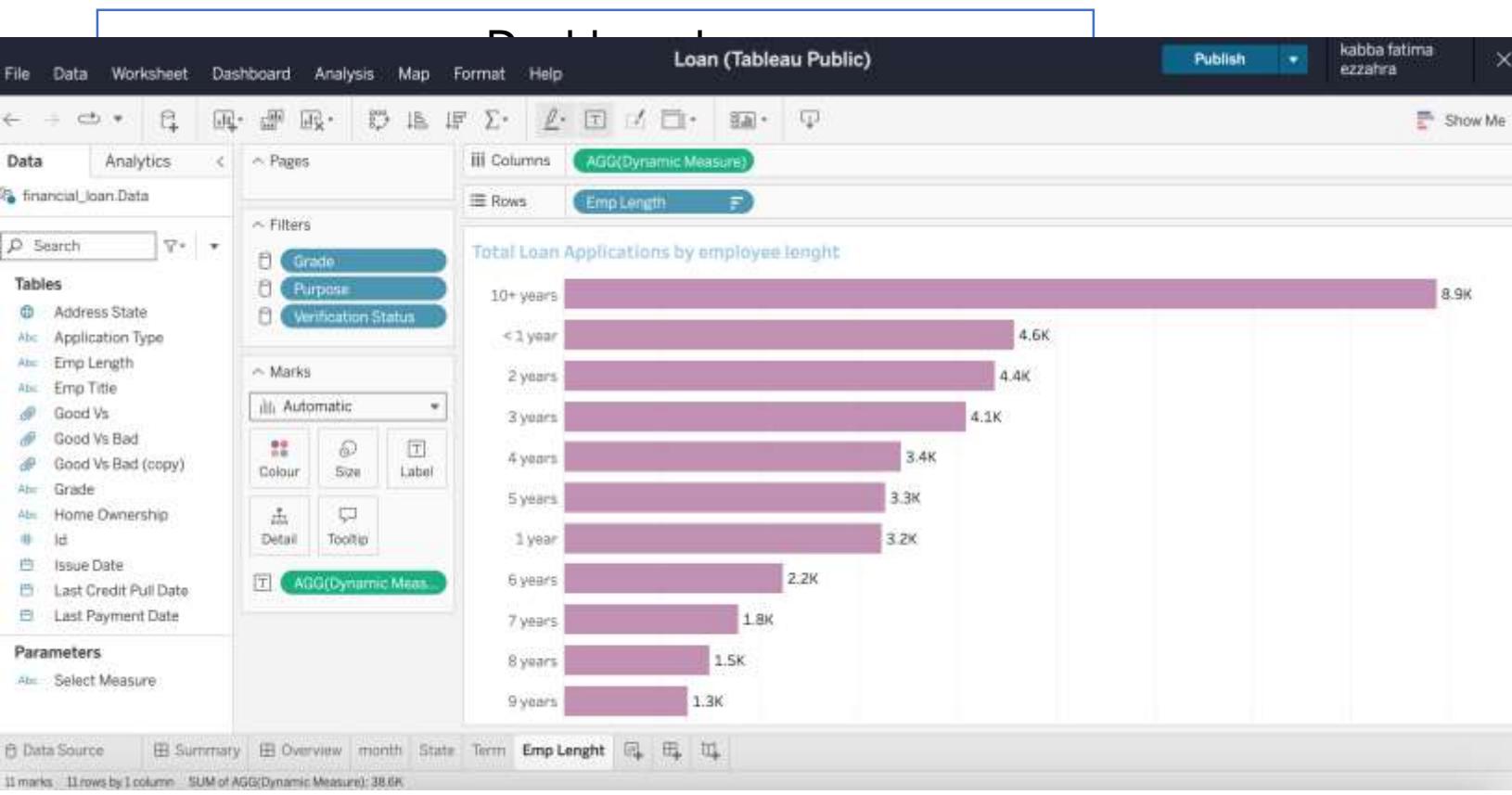


# Dashboard

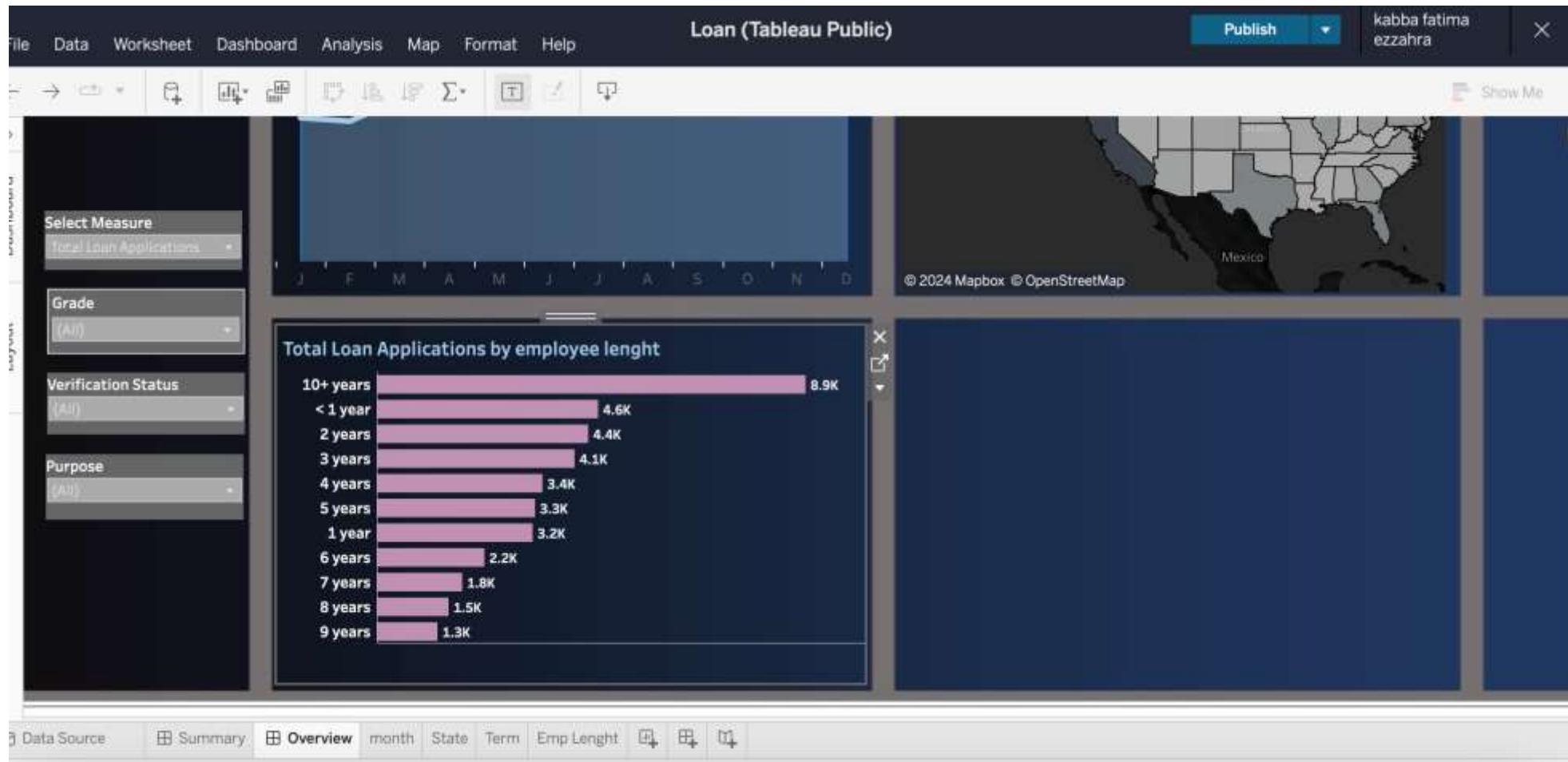


# Dashboard





# Dashboard



# Dashboard

Loan (Tableau Public)

File Data Worksheet Dashboard Analysis Map Format Help

Publish kabba fatima ezzahra X

Show Me

Dashboard Layout Default Desktop Phone Device Preview

Size PowerPoint (1600 x 900)

Sheets

- Purpose
- Total Loan Applications
- MTD Total Loan Applications

Objects

- Horizontal Container
- Vertical Container
- Text
- Extension
- Image
- Rank

Tiled Floating

Show dashboard title

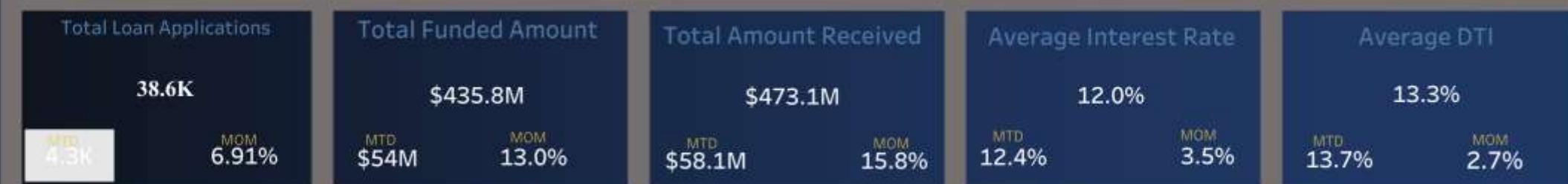
Data Source Summary Overview month State Term Emp Length Purpose

© 2024 Mapbox © OpenStreetMap

**Total Loan Applications by employee length**

| Purpose            | Count |
|--------------------|-------|
| Debt consolidation | 18.2K |
| credit card        | 5.0K  |
| other              | 3.8K  |
| home improvement   | 2.9K  |
| major purchase     | 2.1K  |
| small business     | 1.8K  |
| car                | 1.5K  |
| wedding            | 0.9K  |
| medical            | 0.7K  |
| moving             | 0.6K  |
| house              | 0.4K  |
| vacation           | 0.4K  |
| educational        | 0.3K  |
| renewable_energy   | 0.1K  |

# BANK LOAN REPORT | OVERVIEW

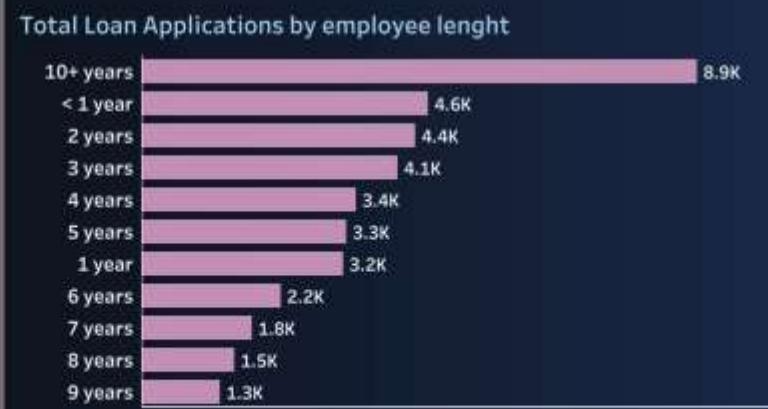


Select Measure  
Total Loan Applications

Grade  
All

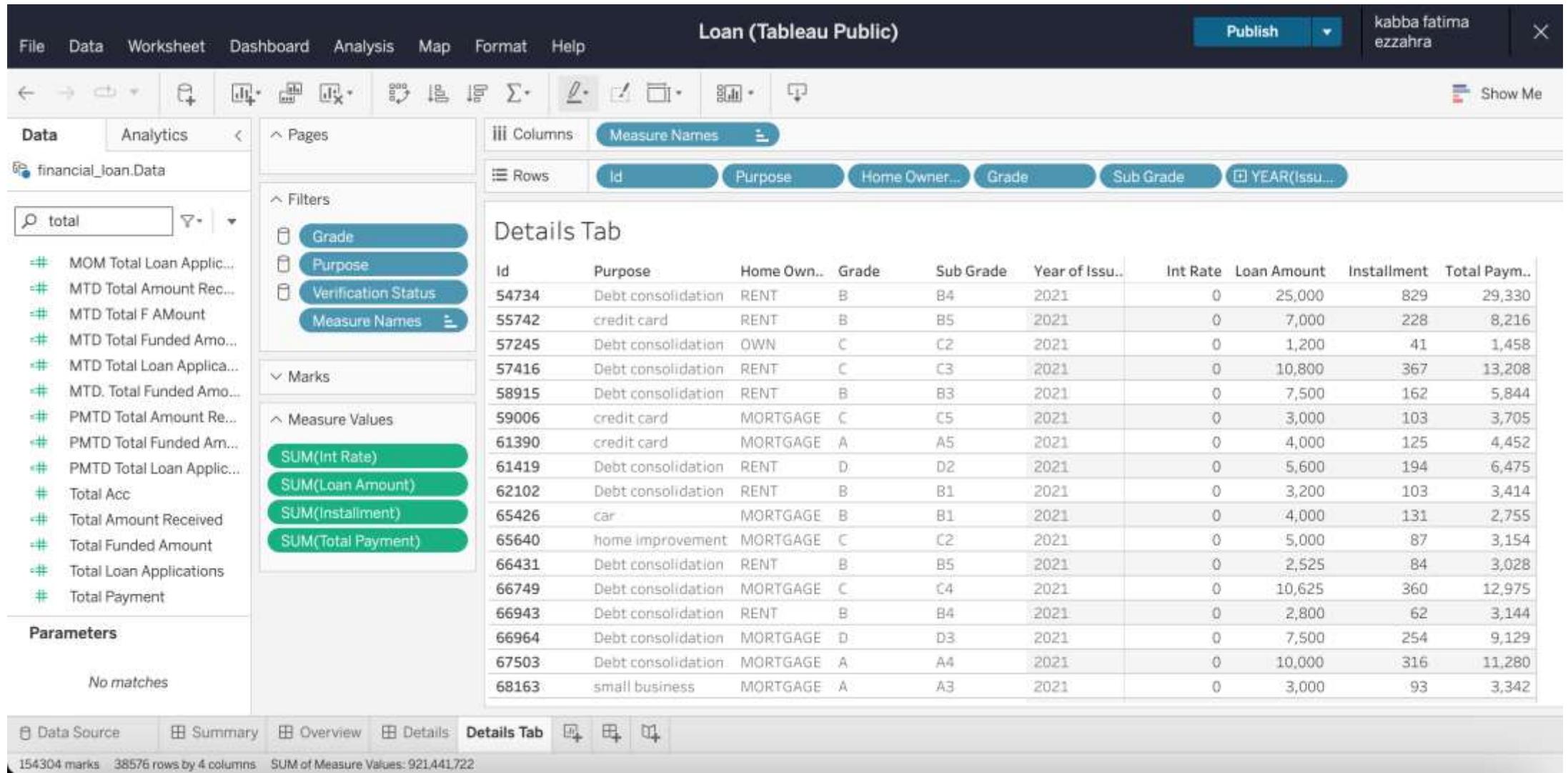
Verification Status  
All

Purpose  
All



# Dashboard

File Data Worksheet Dashboard Analysis Map Format Help **Loan (Tableau Public)** Publish kabba fatima ezzahra X



total

Grade

Purpose

Verification Status

Measure Names

Marks

SUM(Int Rate)

SUM(Loan Amount)

SUM(Installment)

SUM(Total Payment)

Parameters

No matches

Data Source Summary Overview Details Details Tab

154304 marks 38576 rows by 4 columns SUM of Measure Values: 921,441,722

| Id    | Purpose            | Home Own.. | Grade | Sub Grade | Year of Issu.. | Int Rate | Loan Amount | Installment | Total Paym.. |
|-------|--------------------|------------|-------|-----------|----------------|----------|-------------|-------------|--------------|
| 54734 | Debt consolidation | RENT       | B     | B4        | 2021           | 0        | 25,000      | 829         | 29,330       |
| 55742 | credit card        | RENT       | B     | B5        | 2021           | 0        | 7,000       | 228         | 8,216        |
| 57245 | Debt consolidation | OWN        | C     | C2        | 2021           | 0        | 1,200       | 41          | 1,458        |
| 57416 | Debt consolidation | RENT       | C     | C3        | 2021           | 0        | 10,800      | 367         | 13,208       |
| 58915 | Debt consolidation | RENT       | B     | B3        | 2021           | 0        | 7,500       | 162         | 5,844        |
| 59006 | credit card        | MORTGAGE   | C     | C5        | 2021           | 0        | 3,000       | 103         | 3,705        |
| 61390 | credit card        | MORTGAGE   | A     | A5        | 2021           | 0        | 4,000       | 125         | 4,452        |
| 61419 | Debt consolidation | RENT       | D     | D2        | 2021           | 0        | 5,600       | 194         | 6,475        |
| 62102 | Debt consolidation | RENT       | B     | B1        | 2021           | 0        | 3,200       | 103         | 3,414        |
| 65426 | car                | MORTGAGE   | B     | B1        | 2021           | 0        | 4,000       | 131         | 2,755        |
| 65640 | home improvement   | MORTGAGE   | C     | C2        | 2021           | 0        | 5,000       | 87          | 3,154        |
| 66431 | Debt consolidation | RENT       | B     | B5        | 2021           | 0        | 2,525       | 84          | 3,028        |
| 66749 | Debt consolidation | MORTGAGE   | C     | C4        | 2021           | 0        | 10,625      | 360         | 12,975       |
| 66943 | Debt consolidation | RENT       | B     | B4        | 2021           | 0        | 2,800       | 62          | 3,144        |
| 66964 | Debt consolidation | MORTGAGE   | D     | D3        | 2021           | 0        | 7,500       | 254         | 9,129        |
| 67503 | Debt consolidation | MORTGAGE   | A     | A4        | 2021           | 0        | 10,000      | 316         | 11,280       |
| 68163 | small business     | MORTGAGE   | A     | A3        | 2021           | 0        | 3,000       | 93          | 3,342        |

# Dashboard

File Data Worksheet Dashboard Analysis Map Format Help **Loan (Tableau Public)** Publish kabba fatima ezzahra X

Show Me

**DASHBOARD REPORT | DETAILS**

Loan Applications: 38.6K (MOM 6.91%, MTD \$54M)

Total Funded Amount: \$435.8M (MTD \$54M, MOM 13.0%)

Total Amount Received: \$473.1M (MTD \$58.1M, MOM 15.8%)

Average Interest Rate: 12.0% (MTD 12.4%, MOM 3.5%)

Average DTI: 13.3% (MTD 13.7%, MOM 2.7%)

| Purpose            | Home Ow... | Grade | Sub Grade | Issue Date | Int Rate | Loan Amount | Installment | Total Payment |
|--------------------|------------|-------|-----------|------------|----------|-------------|-------------|---------------|
| Debt consolidation | RENT       | B     | B4        | 09/08/20.. | 0        | 25,000      | 829         | 29,330        |
| credit card        | RENT       | B     | B5        | 08/05/20.. | 0        | 7,000       | 228         | 8,216         |
| Debt consolidation | OWN        | C     | C2        | 10/03/20.. | 0        | 1,200       | 41          | 1,458         |
| Debt consolidation | RENT       | C     | C3        | 09/11/20.. | 0        | 10,800      | 367         | 13,208        |
| Debt consolidation | RENT       | B     | B3        | 08/04/20.. | 0        | 7,500       | 162         | 5,844         |
| credit card        | MORTGA..   | C     | C5        | 09/09/20.. | 0        | 3,000       | 103         | 3,705         |
| credit card        | MORTGA..   | A     | A5        | 10/02/20.. | 0        | 4,000       | 125         | 4,452         |
| Debt consolidation | RENT       | D     | D2        | 10/02/20.. | 0        | 5,600       | 194         | 6,475         |
| Debt consolidation | RENT       | B     | B1        | 10/04/20.. | 0        | 3,200       | 103         | 3,414         |
| car                | MORTGA..   | B     | B1        | 09/08/20.. | 0        | 4,000       | 131         | 2,755         |
| home improvement   | MORTGA..   | C     | C2        | 08/05/20.. | 0        | 5,000       | 87          | 3,154         |
| Debt consolidation | RENT       | B     | B5        | 09/02/20.. | 0        | 2,525       | 84          | 3,028         |

Data Source Summary Overview Details

# BANK LOAN REPORT | DETAILS

**Summary**

| Total Loan Applications | Total Funded Amount   | Total Amount Received   | Average Interest Rate       | Average DTI                 |
|-------------------------|-----------------------|-------------------------|-----------------------------|-----------------------------|
| 38.6K                   | \$435.8M              | \$473.1M                | 12.0%                       | 13.3%                       |
| MOM<br>4.3K<br>6.91%    | MTD<br>\$54M<br>13.0% | MTD<br>\$58.1M<br>15.8% | MTD<br>12.4%<br>MOM<br>3.5% | MTD<br>13.7%<br>MOM<br>2.7% |

**Overview**

**Details**

| ID    | Purpose            | Home Ow.. | Grade | Sub Grade | Issue Date | Int Rate | Loan Amount | Installment | Total Payment |
|-------|--------------------|-----------|-------|-----------|------------|----------|-------------|-------------|---------------|
| 54734 | Debt consolidation | RENT      | B     | B4        | 09/08/20.. | 11.9%    | 25,000      | 829         | 29,330        |
| 55742 | credit card        | RENT      | B     | B5        | 08/05/20.. | 10.7%    | 7,000       | 228         | 8,216         |
| 57245 | Debt consolidation | OWN       | C     | C2        | 10/03/20.. | 13.1%    | 1,200       | 41          | 1,458         |
| 57416 | Debt consolidation | RENT      | C     | C3        | 09/11/20.. | 13.6%    | 10,800      | 367         | 13,208        |
| 58915 | Debt consolidation | RENT      | B     | B3        | 08/04/20.. | 10.1%    | 7,500       | 162         | 5,844         |
| 59006 | credit card        | MORTGA..  | C     | C5        | 09/09/20.. | 14.3%    | 3,000       | 103         | 3,705         |
| 61390 | credit card        | MORTGA..  | A     | A5        | 10/02/20.. | 7.9%     | 4,000       | 125         | 4,452         |
| 61419 | Debt consolidation | RENT      | D     | D2        | 10/02/20.. | 15.0%    | 5,600       | 194         | 6,475         |
| 62102 | Debt consolidation | RENT      | B     | B1        | 10/04/20.. | 9.9%     | 3,200       | 103         | 3,414         |
| 65426 | car                | MORTGA..  | B     | B1        | 09/08/20.. | 11.1%    | 4,000       | 131         | 2,755         |
| 65640 | home improvement   | MORTGA..  | C     | C2        | 08/05/20.. | 11.3%    | 5,000       | 87          | 3,154         |
| 66431 | Debt consolidation | RENT      | B     | B5        | 09/02/20.. | 12.2%    | 2,525       | 84          | 3,028         |
| 66749 | Debt consolidation | MORTGA..  | C     | C4        | 08/12/20.. | 13.5%    | 10,625      | 360         | 12,975        |
| 66943 | Debt consolidation | RENT      | B     | B4        | 10/08/20.. | 11.5%    | 2,800       | 62          | 3,144         |
| 66954 | Debt consolidation | MORTGA..  | D     | D3        | 08/06/20.. | 13.2%    | 7,500       | 254         | 9,129         |
| 67503 | Debt consolidation | MORTGA..  | A     | A4        | 09/10/20.. | 8.6%     | 10,000      | 316         | 11,280        |
| 68163 | small business     | MORTGA..  | A     | A3        | 10/02/20.. | 7.1%     | 3,000       | 93          | 3,342         |
| 68381 | Debt consolidation | RENT      | A     | A5        | 08/03/20.. | 8.6%     | 6,625       | 210         | 7,542         |
| 68817 | major purchase     | MORTGA..  | C     | C1        | 08/03/20.. | 11.0%    | 10,000      | 328         | 11,709        |
| 68926 | moving             | RENT      | D     | D2        | 08/08/20.. | 13.2%    | 2,300       | 78          | 2,797         |
| 69001 | credit card        | MORTGA..  | A     | A5        | 09/09/20.. | 8.9%     | 15,000      | 477         | 17,136        |
| 69124 | Debt consolidation | MORTGA..  | B     | B4        | 08/03/20.. | 10.4%    | 18,000      | 584         | 21,028        |
| 69168 | major purchase     | RENT      | E     | E4        | 08/04/20.. | 15.1%    | 5,000       | 174         | 6,251         |
| 69251 | other              | MORTGA..  | A     | A3        | 08/05/20.. | 8.0%     | 6,000       | 188         | 6,784         |
| 69550 | Debt consolidation | RENT      | D     | D3        | 10/05/20.. | 15.3%    | 11,200      | 268         | 15,924        |
| 69828 | other              | OWN       | A     | A5        | 08/03/20.. | 8.6%     | 15,000      | 474         | 17,208        |
| 69924 | credit card        | RENT      | D     | D4        | 08/03/20.. | 13.6%    | 10,000      | 340         | 12,225        |
| 69990 | credit card        | RENT      | A     | A5        | 10/02/20.. | 7.9%     | 15,500      | 485         | 17,438        |
| 70348 | Debt consolidation | RENT      | C     | C5        | 08/03/20.. | 12.3%    | 9,600       | 320         | 11,341        |

**Select Measure**  
Total Loan Applications

**Grade**  
All

**Verification Status**  
All

**Purpose**  
All