Insurance Dashboard - Click here for the dashboard link

1. Project Overview

- **Objective**: Analyze insurance policy data for insights on policy trends, financial performance, and agent contributions.
- **Data Source**: Excel files, imported into Power BI for analysis.

2.Data Fields

Policy Details
- **Type: Type of policy (New, Renewal, Endorsement, etc.).**
- **Policy: Unique policy identifier.**
- **Policy Status: Current status (In Force, Cancelled, Expired, Amended).**
- **Subscription Status: Paid or Unpaid.**

Financial Information
- **Net, Charges, Cost, Commission Amount: Breakdown of financial components.**
- **VAT & Tax: Applicable taxes.**
- **TOTAL: Sum of all financial amounts.**
- **O/S Premium, Paid Premium: Outstanding vs. collected payments.**

Date Fields
- **Issue Date: Date policy was issued.**
- **Inception & Expiry: Policy starts and end dates.**
- **Und. Year: Underwriting year.**

Policy Holder Information
- **Policy Holder & Insured Name: Customer details.**
- **Nationality & Emirate: Location and nationality of insured.**
- **Business Type & Activity: Industry classification.**

Agent & Agency Details
- **Agt Code, Agt Name: Identifiers for agents.**
- **Agency & Agcy No.: Associated agency details.**
- **Introducer & Introducer Com Rate: Referral agent and commission rate.**

Multi-Currency Financials
- **$ Fields**: Financial amounts in primary currency.
- **LC Fields**: Financial amounts in local currency.

3. DAX Calculation

Active Policies - Counts policies that are current

```
Active Policies =
CALCULATE(
    COUNTROWS('Sheet1'),
    'Sheet1'[Policy Status] = "In Force"
)
```

Average Commission - Calculates the average commission percentage.

```
Avg Commission = AVERAGE(Sheet1[Commission%])
```

Cancelled Policies - Counts policies with a **"Cancelled"** status.

```
Cancelled Policies =
CALCULATE(
    COUNTROWS('Sheet1'),
    'Sheet1'[Policy Status] = "Cancelled"
)
```

Days to Expiry - Calculates days left until policy expiry. If expired, it returns to "Already Expired".

```
Days To Expiry =
IF(
    DATEDIFF(TODAY(), 'Sheet1'[Expiry], DAY) < 0,
    "Already Expired",
    FORMAT(DATEDIFF(TODAY(), 'Sheet1'[Expiry], DAY), "0")
)
```

High Outstanding Premium Indicator - Flags policies with outstanding premiums **above 5000** as "High", otherwise "Low".

```
High_OS_Premium =
IF('Sheet1'[O/S Premium] > 5000, "High", "Low")
```

Profit Calculation - Computes profit by subtracting **cost** from **total revenue**.

```
Profit = Sheet1[TOTAL] - Sheet1[Cost]
```