Credit Card Financial Weekly Dashboard Report

Overview

Goal:

Build a smart and interactive dashboard to give a weekly snapshot of how credit card operations are performing-helping teams make fast, data-driven decisions.

Project Flow

1. Objective

Create a professional dashboard that tracks:

- Total revenue, interest, and transactions
- Customer insights (age, income, gender)
- Card usage by type and region

2. Data Sources

- Raw data files in .csv format
- SQL database for structured queries

3. Data Preparation Steps

- Clean and format CSV data
- Load it into SQL
- Use SQL queries to build base tables
- Import data into Power BI

DAX Formulas

Categorize Customers by Age:

```
AgeGroup = SWITCH(
  TRUE(),
  [customer_age] < 30, "20-30",
  [customer_age] < 40, "30-40",
  [customer_age] < 50, "40-50",
```

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```
  [customer_age] < 60, "50-60",
  [customer_age] >= 60, "60+",
  "Unknown")
```

Income Levels:

```
IncomeGroup = SWITCH(
  TRUE(),
  [income] < 35000, "Low",
  [income] < 70000, "Medium",
  [income] >= 70000, "High",
  "Unknown")
```

Revenue Calculation:

```
Revenue = [annual_fees] + [total_trans_amt] + [interest_earned]
```

Weekly Performance Highlights (Week 53)

Revenue Jump: +28.8%

YTD Revenue: $57 Million

Total Interest Earned: $8 Million

Total Transactions: $46 Million

Top Customer Segment: Male ($31M revenue)

Most Popular Cards: Blue & Silver (93% usage)

Top Regions: TX, NY, CA (68% of all activity)

Activation Rate: 57.5%

Delinquency Rate: 6.06%

Resume Bullet Points

Credit Card BI Dashboard with Power BI

- Built an end-to-end financial dashboard for credit card operations

- Used SQL + DAX to filter and analyze transactional data

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- Delivered insights to stakeholders for performance improvement
- Created age/income segmentation and revenue trends