**BANK LOAN REPORT QUERY DOCUMENT**

1. **BANK LOAN REPORT | SUMMARY**

**KPI’s:**

Total Loan Applications

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



MTD Loan Applications

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

WHERE MONTH(issue\_date) = 12



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

WHERE MONTH(issue\_date) = 11



Total Funded Amount

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



MTD Total Funded Amount

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

WHERE MONTH(issue\_date) = 12



PMTD Total Funded Amount

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

WHERE MONTH(issue\_date) = 11



Total Amount Received

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



MTD Total Amount Received

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

WHERE MONTH(issue\_date) = 12



PMTD Total Amount Received

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

WHERE MONTH(issue\_date) = 11



Average Interest Rate

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



MTD Average Interest

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

WHERE MONTH(issue\_date) = 12



PMTD Average Interest

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

WHERE MONTH(issue\_date) = 11



Avg DTI

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



MTD Avg DTI

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

WHERE MONTH(issue\_date) = 12



PMTD Avg DTI

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

WHERE MONTH(issue\_date) = 11



**GOOD LOAN ISSUED**

Good Loan Percentage

SELECT

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

COUNT(id) AS Good\_Loan\_Percentage

FROM bank\_loan\_data



Good Loan Applications

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

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



Good Loan Funded Amount

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

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



Good Loan Amount Received

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

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



**BAD LOAN ISSUED**

Bad Loan Percentage

SELECT

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

COUNT(id) AS Bad\_Loan\_Percentage

FROM bank\_loan\_data



Bad Loan Applications

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

WHERE loan\_status = 'Charged Off'



Bad Loan Funded Amount

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

WHERE loan\_status = 'Charged Off'



Bad Loan Amount Received

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

WHERE loan\_status = 'Charged Off'



**LOAN STATUS**

SELECT

        loan\_status, COUNT(id) AS LoanCount,

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

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

        AVG(int\_rate \* 100) AS Interest\_Rate,

        AVG(dti \* 100) AS DTI

    FROM

        bank\_loan\_data

    GROUP BY

        loan\_status



SELECT

loan\_status,

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

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

FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 12

GROUP BY loan\_status



1. **BANK LOAN REPORT | OVERVIEW**

**MONTH**

SELECT

MONTH(issue\_date) AS Month\_Munber,

DATENAME(MONTH, issue\_date) AS Month\_name,

COUNT(id) AS Total\_Loan\_Applications,

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

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

FROM bank\_loan\_data

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

ORDER BY MONTH(issue\_date)



**STATE**

SELECT

address\_state AS State,

COUNT(id) AS Total\_Loan\_Applications,

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

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

FROM bank\_loan\_data

GROUP BY address\_state

ORDER BY address\_state



**TERM**

SELECT

term AS Term,

COUNT(id) AS Total\_Loan\_Applications,

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

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

FROM bank\_loan\_data

GROUP BY term

ORDER BY term



**EMPLOYEE LENGTH**

SELECT

emp\_length AS Employee\_Length,

COUNT(id) AS Total\_Loan\_Applications,

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

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

FROM bank\_loan\_data

GROUP BY emp\_length

ORDER BY emp\_length



**PURPOSE**

SELECT

purpose AS PURPOSE,

COUNT(id) AS Total\_Loan\_Applications,

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

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

FROM bank\_loan\_data

GROUP BY purpose

ORDER BY purpose



**HOME OWNERSHIP**

SELECT

home\_ownership AS Home\_Ownership,

COUNT(id) AS Total\_Loan\_Applications,

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

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

FROM bank\_loan\_data

GROUP BY home\_ownership

ORDER BY home\_ownership



Note: We have applied multiple Filters on all the dashboards. You can check the results for the filters as well by modifying the query and comparing the results.

For e.g

See the results when we hit the Grade A in the filters for dashboards.

SELECT

purpose AS PURPOSE,

COUNT(id) AS Total\_Loan\_Applications,

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

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

FROM bank\_loan\_data

WHERE grade = 'A'

GROUP BY purpose

ORDER BY purpose