

Credit Card

Weekly Status Report

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Agenda:

1. Project objective

2. Data from SQL

3. Data processing & DAX

4. Dashboard & insights

5. Export & share Projection title

Project objective

- Develop a comprehensive weekly credit card dashboard.
- Provide real-time insights into key performance metrics and trends.
- Enable stakeholders to effectively monitor credit card operations.
- Support data-driven analysis and decision-making through clear visualization.



Next step:

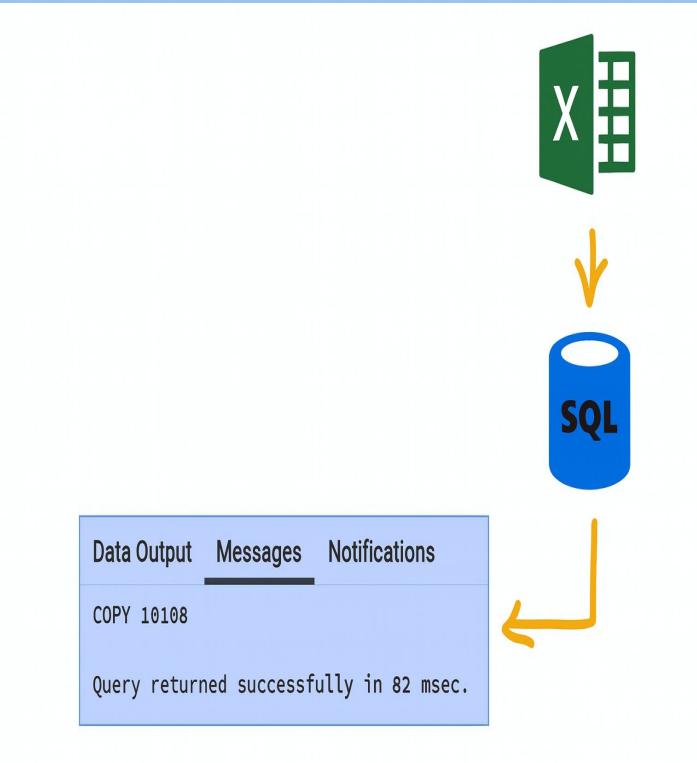
Download Data

Github Link:

https://github.com/lqralshfaq14/Credit_Card_Financial_Dashboard/upload/main

Import data to SQL database

1. Prepare csv file
2. Create tables in SQL
3. import csv file into SQL



DAX Queries

1. AgeGroup = SWITCH(TRUE(), 'public cust_detail'[customer_age] < 30, "20-30", 'public cust_detail'[customer_age] >= 30 && 'public cust_detail'[customer_age] < 40, "30-40", 'public cust_detail'[customer_age] >= 40 && 'public cust_detail'[customer_age] < 50, "40-50", 'public cust_detail'[customer_age] >= 50 && 'public cust_detail'[customer_age] < 60, "50-60", 'public cust_detail'[customer_age] >= 60, "60+", "unknown")
2. IncomeGroup = SWITCH(TRUE(), 'public cust_detail'[income] < 35000, "Low", 'public cust_detail'[income] >= 35000 && 'public cust_detail'[income] < 70000, "Med", 'public cust_detail'[income] >= 70000, "High", "unknown")
3. week_num2 = WEEKNUM('public cc_detail'[week_start_date]) Revenue = 'public cc_detail'[annual_fees] + 'public cc_detail'[total_trans_amt] + 'public cc_detail'[interest_earned] Current_week_Revenue = CALCULATE(SUM('public cc_detail'[Revenue]), FILTER(ALL('public cc_detail'), 'public cc_detail'[week_num2] = MAX('public cc_detail'[week_num2])))
4. Previous_week_Revenue = CALCULATE(SUM('public cc_detail'[Revenue]), FILTER(ALL('public cc_detail'), 'public cc_detail'[week_num2] = MAX('public cc_detail'[week_num2])-1))

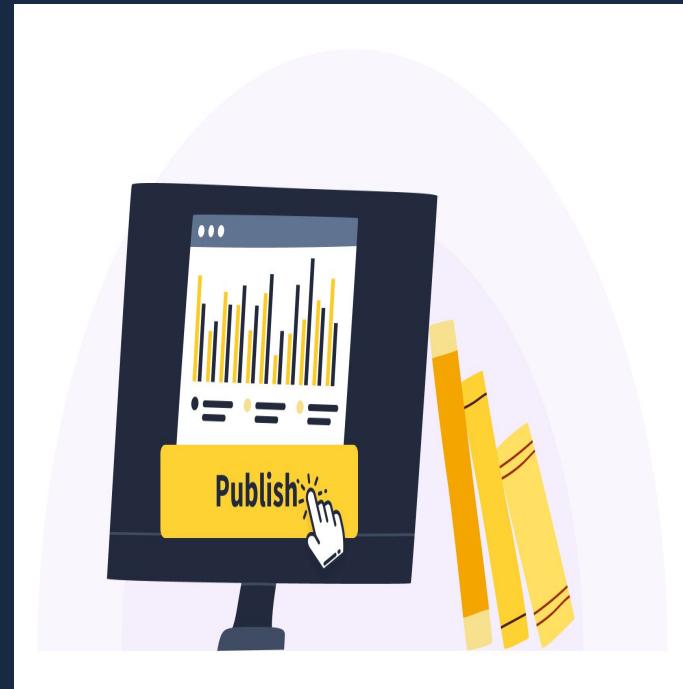
Project Insights- Week 53 (31st Dec)

WoW change:

- Revenue increased by 28.8%.
- Total Transaction Amt increased by 1.69 %
- Customer count increased by 4.2%

Overview YTD:

- Overall revenue is 57M
- Total interest is 8M
- Total transaction amount is 46M
- Male customers are contributing more in revenue 31M, female 26M
- Blue & Silver credit card are contributing to 93% of overall transactions
- TX, NY & CA is contributing to 68%
- Overall Activation rate is 575%
- Overall Delinquent rate is 6.06%



Added to resume

- Developed an interactive dashboard using transaction and customer data from a SQL database, to provide real-time insights.
- Streamlined data processing & analysis to monitor key performance metrics and trends.
- Shared actionable insights with stakeholders based on dashboard findings to support decision-making processes.

Thank you

Your time and attention are appreciated. Happy to discuss insights or improvements.

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