

CREDIT CARD

WEEKLY
STATUS REPORT



Content in this tutorial video

1. Project objective
2. Data from SQL
3. Data processing & DAX
4. Dashboard & insights



Project Objective

To develop a comprehensive credit card weekly dashboard that provides real-time insights into key performance metrics and trends, enabling stakeholders to monitor and analyze credit card operations effectively.



Download Data

GitHub:

https://github.com/Jatin15jpg/Credit_Card_Financial_DashboardA



or

Google Drive:

[Click Here](#)



Import data to SQL database

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



Data Output	Messages	Notifications
COPY 10108		
Query returned successfully in 82 msec.		

DAX Queries

```
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"  
)
```

```
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"  
)
```



DAX Queries

```
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])))
```

```
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 52 (24th Dec)

Week on Week change:

- Revenue increased by 28.8%,
- Total Transaction Amt increased by 1.68%
- revenue decreased by 0.31%

Overview Year To Date:

- Overall revenue is 55M
- Total interest is 7.84M
- Total transaction amount is 45M
- Male customers are contributing more in revenue 30M, female 25M
- Blue & Silver credit card are contributing to 93% of overall transactions
- TX, NY & CA is contributing to 68.94%
- Overall Activation rate is 57.5%
- Overall Delinquent rate is 6.06%

