

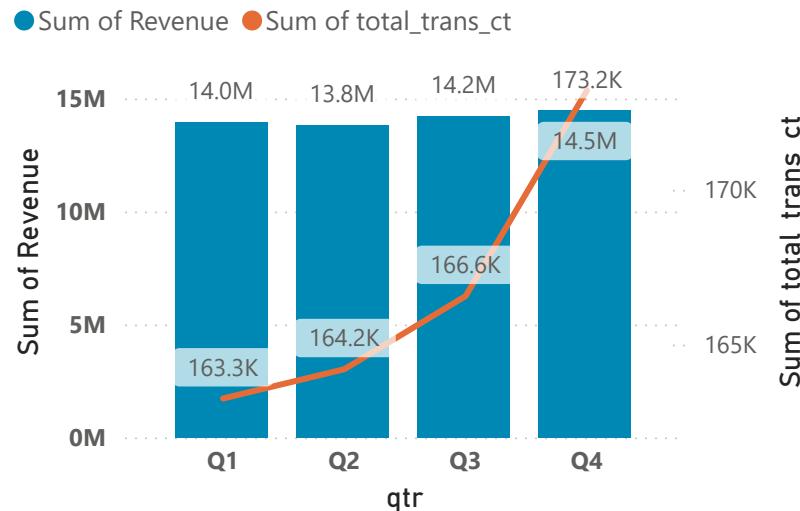
Credit Card Transaction Report

Revenue **56.5M** Interest Earned **8M** Transaction Amt **45.5M** # of Transactions **667K**

Card Category	Revenue	Interest Earned	Annual Fees
Blue	47188612	66,14,173	27,33,690
Silver	5659109	8,21,923	1,89,590
Gold	2533682	3,84,755	57,565
Platinum	1135608	1,61,629	20,665
Total	56517011	79,82,480	30,01,510

Q4 Q3 Q2 Q1

QTR Revenue vs Total Transactions



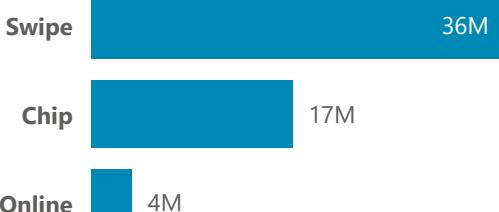
Week_Start_Date
All

F M

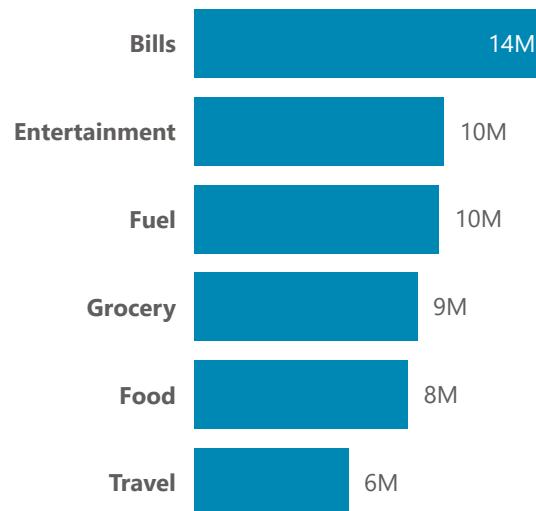
Low Med High

Gold Silver Blue Platinum

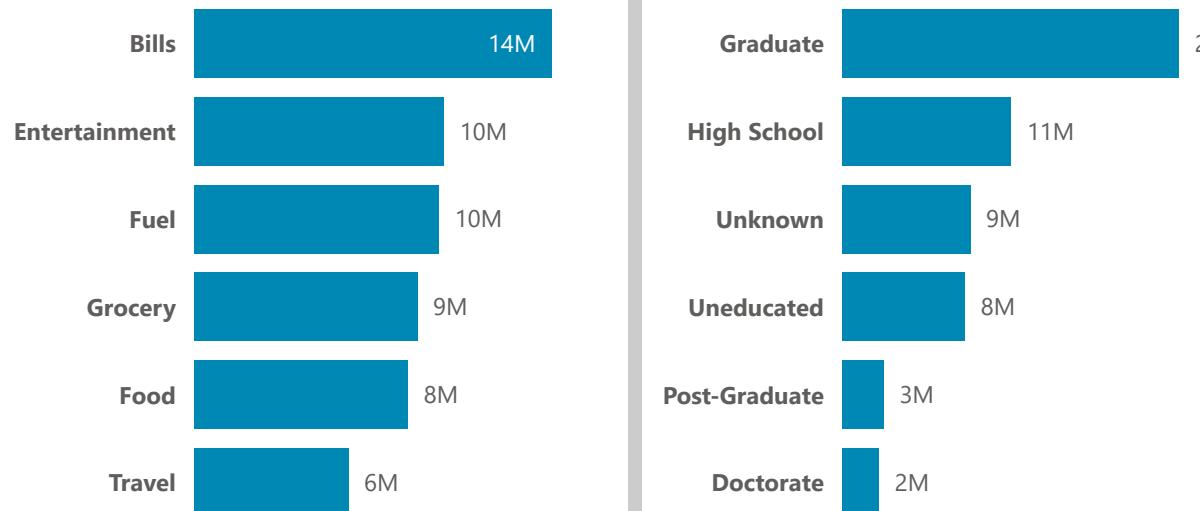
Revenue by Card Usage Type



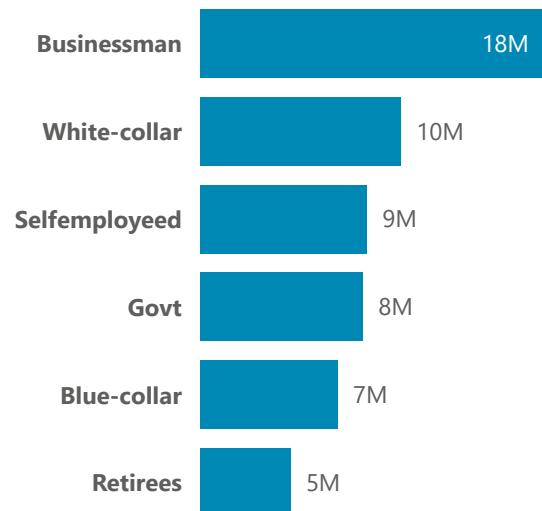
Revenue by Expenditure Type



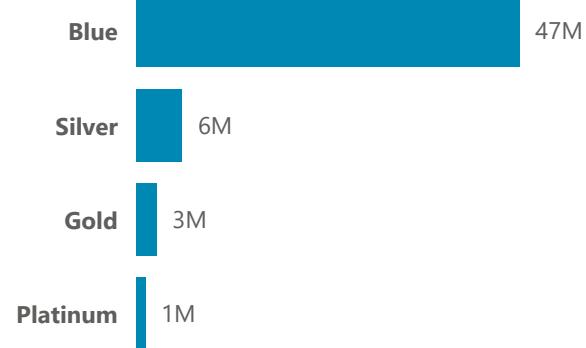
Revenue by Education Level



Revenue by Job Category



Revenue by Card Category



Credit Card Customer Report

Q4

Q3

Q2

Q1

Week_Start_Date

All

Revenue

57M

Interest Earned

8M

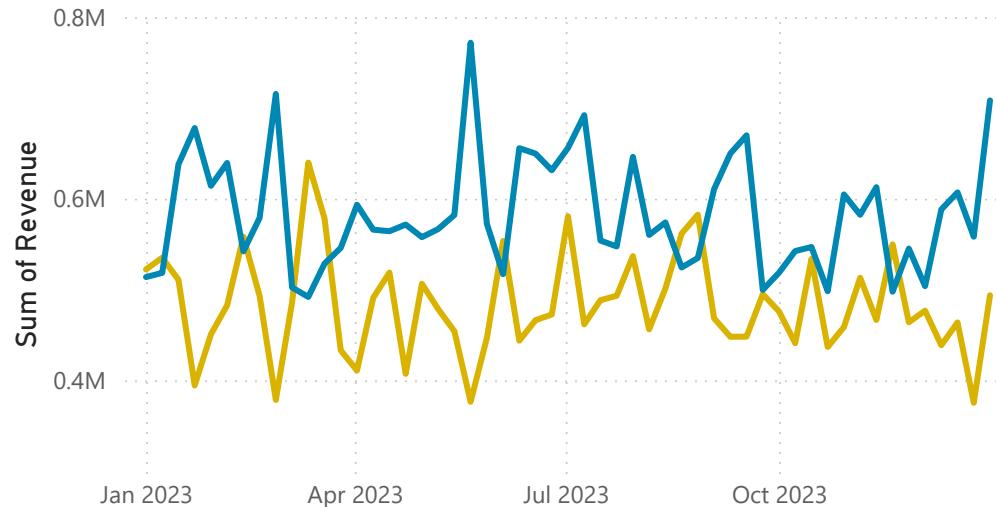
Income

588M

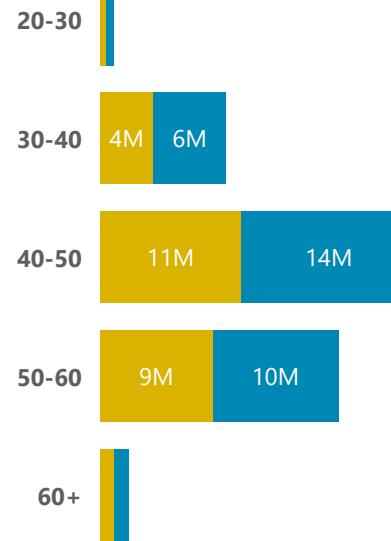
CSS

3.19

Genderwise Revenue by Week



Age Group



M

F

31M

26M

Low

Med

High

Gold

Silver

Blue

Platinum

Customer_Job

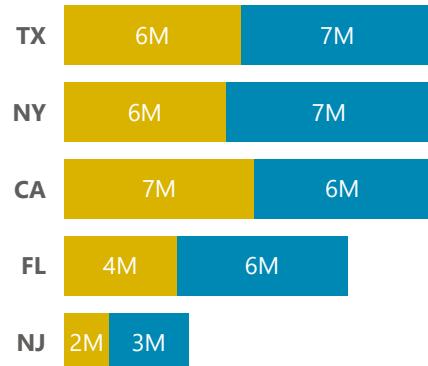
Revenue

Transaction A...

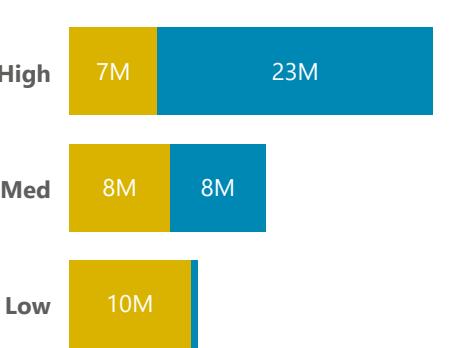
Income

Businessman	17697472	14538883	190350431
White-collar	10283124	8359688	105618475
Selfemployed	8542826	6640301	77659931
Govt	8335534	6701573	90834727
Blue-collar	7040606	5602930	73516911
Retirees	4617448	3689646	49619308
Total	56517011	45533021	587599783

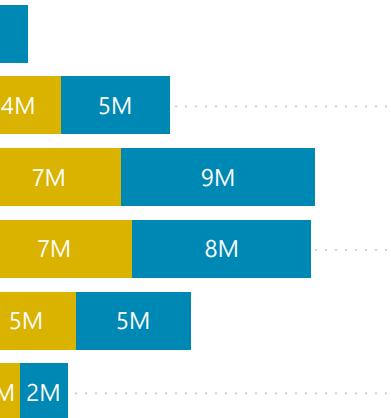
Top 5 States



Income Category



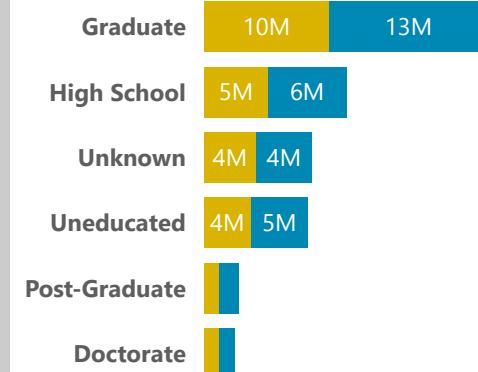
Dependent Count



Marital Status



Education Level



Credit Card Financial Report Synopsis

- 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.

Dashboard Analysis

WoW change:

- Revenue increased by 28.8%,
- Total Transaction Amt & Count increased by 35.04% & 3.39%
- Customer count increased by 12.80%.

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 57.5%
- Overall Delinquent rate is 6.06%, Self employed are the major contributor with 1.66% default rate.

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"  
)
```

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])))

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"  
)
```

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))

Revenue = 'public cc_detail'[annual_fees] + 'public cc_detail'[total_trans_amt] + 'public cc_detail'[interest_earned]

week_num2 = WEEKNUM('public cc_detail'[week_start_date])

SQL Queries

Query to Add new database and create tables

CREATE DATABASE ccdb;	
CREATE TABLE cc_detail (Client_Num INT, Card_Category VARCHAR(20), Annual_Fees INT, Activation_30_Days INT, Customer_Acq_Cost INT, Week_Start_Date DATE, Week_Num VARCHAR(20), Qtr VARCHAR(10), current_year INT, Credit_Limit DECIMAL(10,2), Total_Revolving_Bal INT, Total_Trans_Amt INT, Total_Trans_Ct INT, Avg_Utilization_Ratio DECIMAL(10,3), Use_Chip VARCHAR(10), Exp_Type VARCHAR(50), Interest_Earned DECIMAL(10,3), Delinquent_Acc VARCHAR(5));	CREATE TABLE cust_detail (Client_Num INT, Customer_Age INT, Gender VARCHAR(5), Dependent_Count INT, Education_Level VARCHAR(50), Marital_Status VARCHAR(20), State_cd VARCHAR(50), Zipcode VARCHAR(20), Car_Owner VARCHAR(5), House_Owner VARCHAR(5), Personal_Loan VARCHAR(5), Contact VARCHAR(50), Customer_Job VARCHAR(50), Income INT, Cust_Satisfaction_Score INT);

Query to Append & Merge fresh data

COPY cc_detail FROM 'D:\cc_add.csv' DELIMITER ',' CSV HEADER;	COPY cust_detail FROM 'D:\cust_add.csv' DELIMITER ',' CSV HEADER;
--	--

SQL platform = Postgres 16

SQL Path = C:\Program Files\PostgreSQL\16\bin\psql.exe

Username = postgres

Password = 123

SQL Database Name = ccdb

Table 1 = cc_detail

Table 2 = cust_detail

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Connect for more such Dashboards & Resources

Keep Learning & Keep Growing