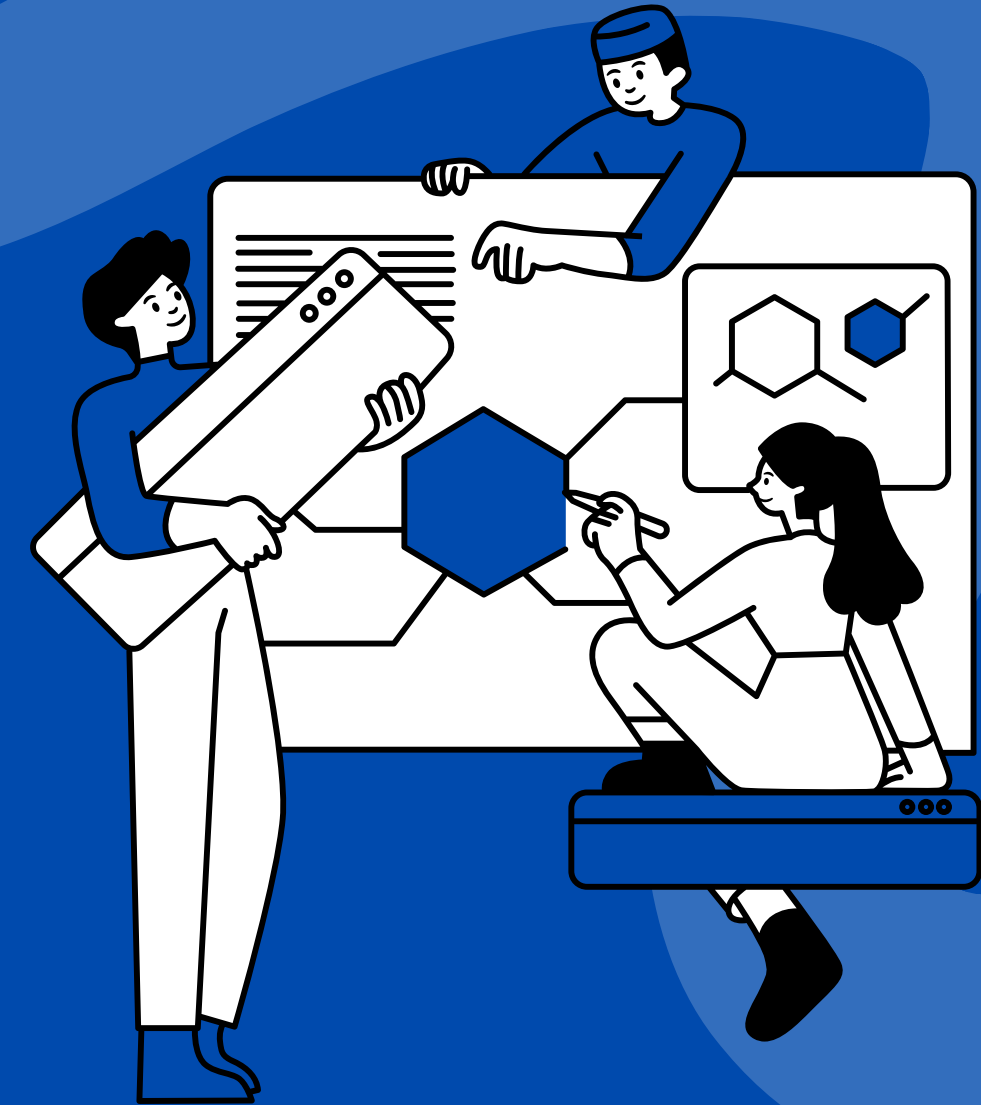


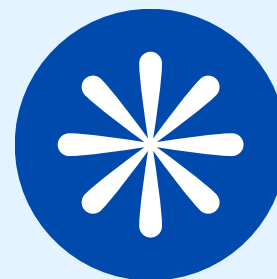
Credit card Financials



It is about putting effort
and data into action.

Project objective

To create a thorough weekly dashboard for credit cards that offers stakeholders real-time insights into important performance indicators and patterns, allowing them to efficiently monitor and assess credit card operations.





Steps included

- Understanding data and requirements
- Import data to SQL Database
- Connecting SQL Database to power BI
- Data cleaning in power query
- Writing DAX Measures
- Creating Dashboards in Power BI
- Deriving project insights

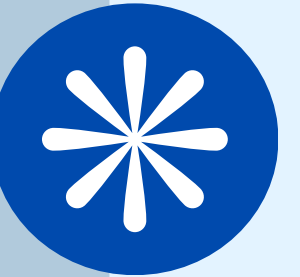


Understanding data



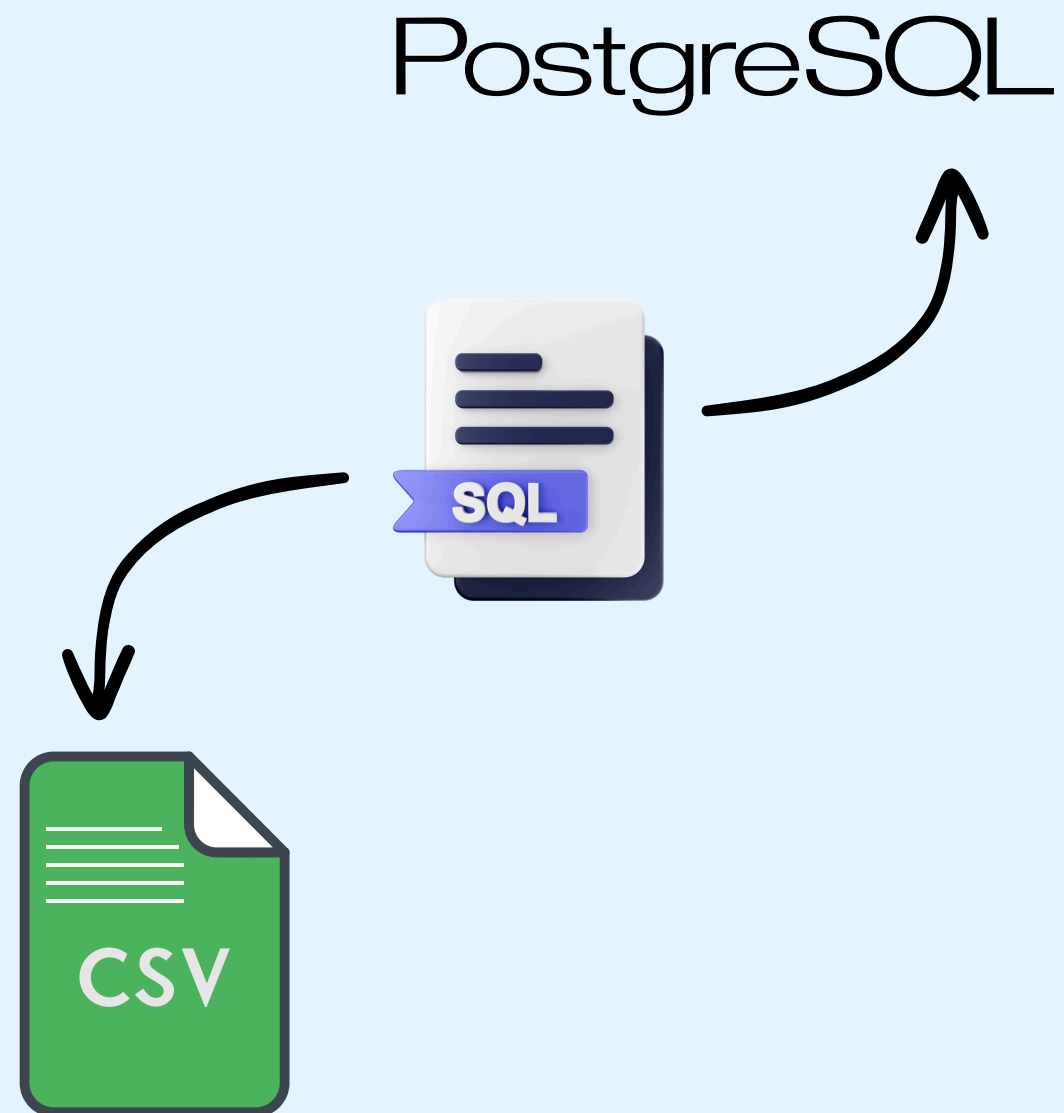
Deep Dive into data

- Brief understanding of data is very important before starting the actual work.
- We have data related to credit card transactions on a weekly basis.
- Also we have customer details on a weekly basis.
- went thoroughly through the data and understood what to be done further.
- generated few ideas on which columns to be used further to derive insights

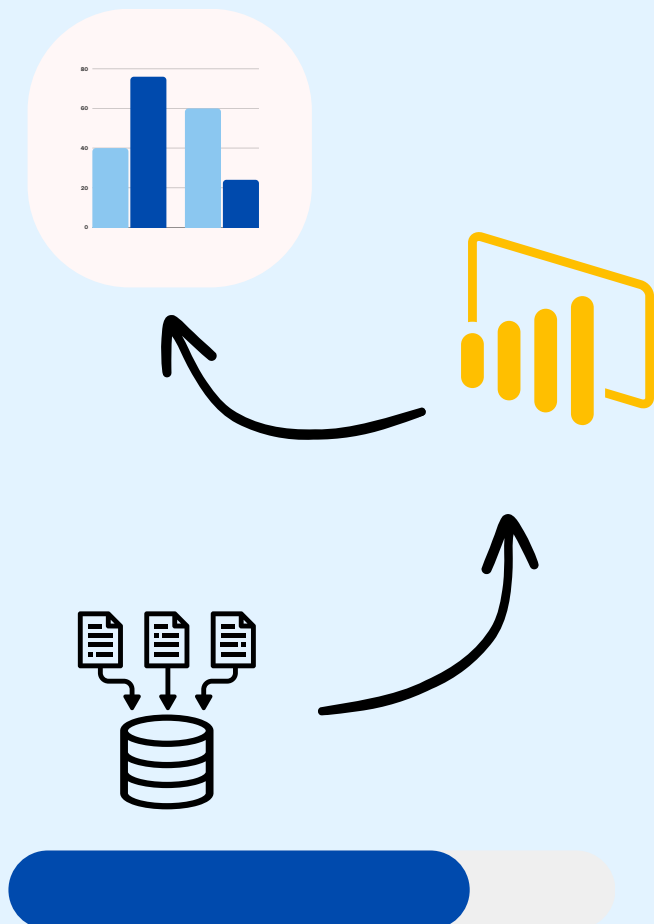


Import data to SQL Database

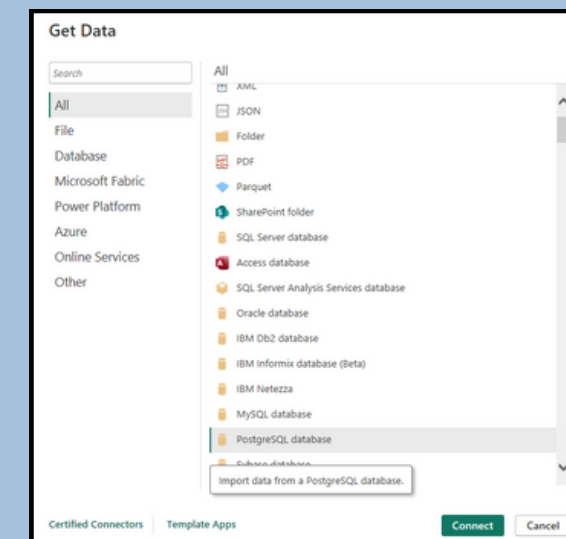
- Prepare CSV files.
- Create Database in PostgreSQL.
- Create tables in SQL.
- Import CSV file into SQL.



Connecting database to Power BI



- Database from PostgreSQL should be connected to Power BI
- Further work like data cleaning is done in power query.

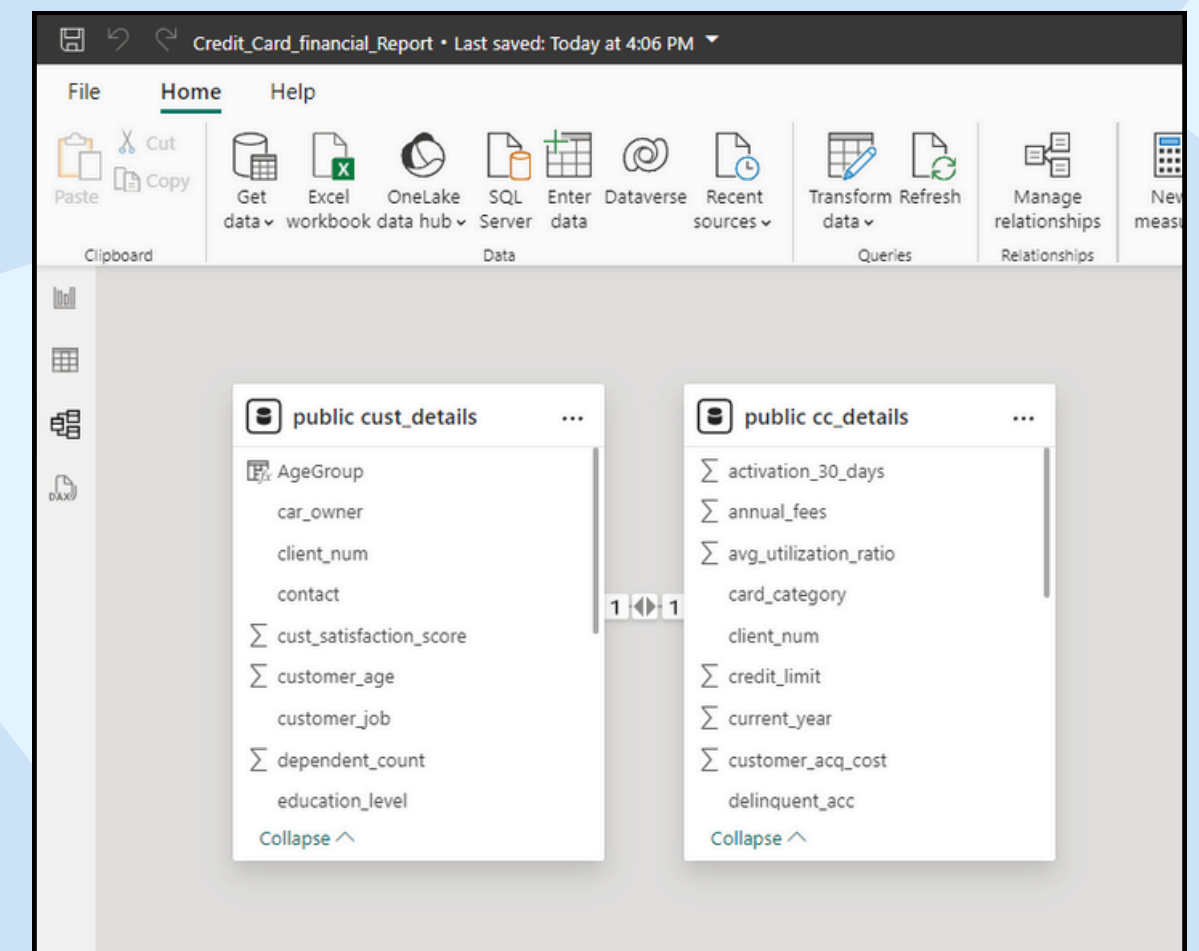
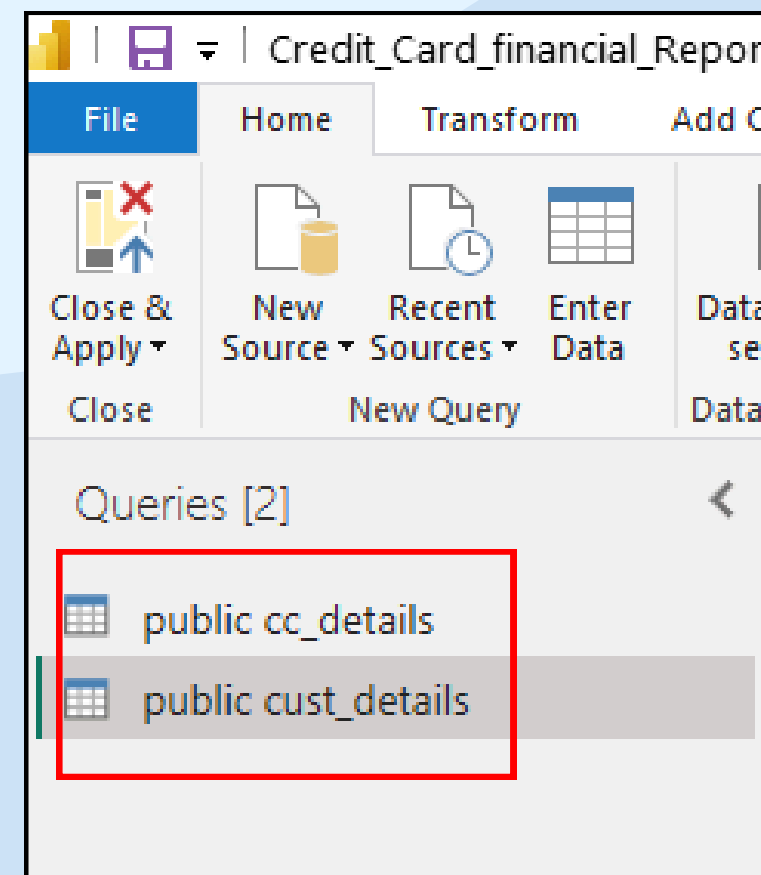


Data cleaning in power query

- Before creating dashboard data is cleaned in the Power query
- Data loaded to power BI is further taken to power query and performed data cleaning.

The screenshot shows the Power Query Editor interface. The main area displays a table with columns: client_num, customer_age, gender, dependent_count, education_level, marital_status, state_cd, and zipcode. Each column has a data quality bar at the top indicating the percentage of valid, error, and empty data. For example, 'client_num' is 100% valid, while 'education_level' has 100% valid, 0% error, and 0% empty data.

	client_num	customer_age	gender	dependent_count	education_level	marital_status	state_cd	zipcode
1	708082083	24	F	1	Uneducated	Single	FL	91750
2	708083283	62	F	0	Unknown	Married	NJ	91750
3	708084558	32	F	1	Unknown	Married	NJ	91750
4	708085458	38	M	2	Uneducated	Single	NY	91750
5	708086958	48	M	4	Graduate	Single	TX	91750



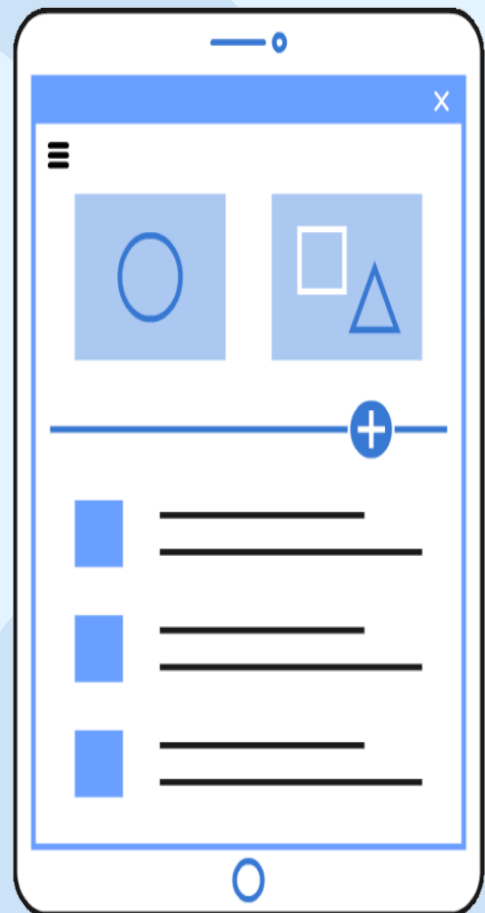
Writing DAX Measures

```
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"
)
```



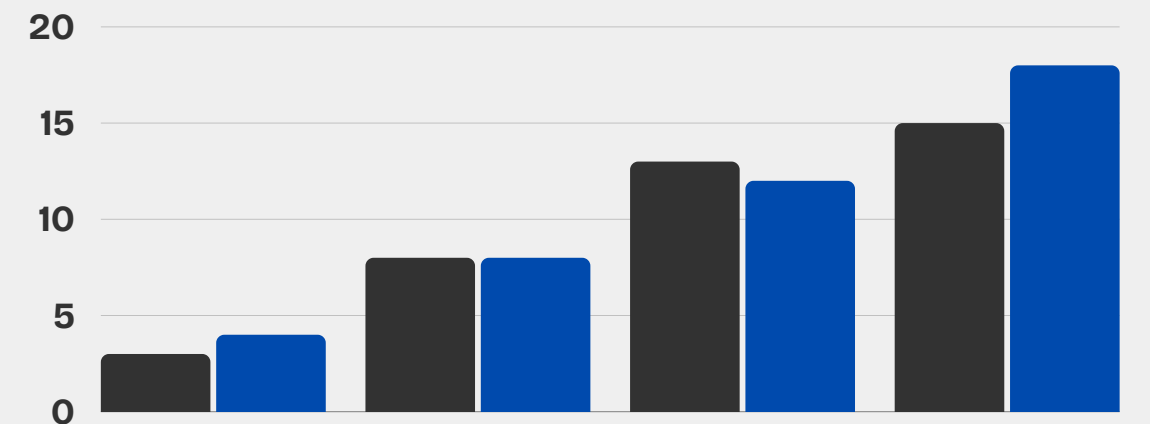
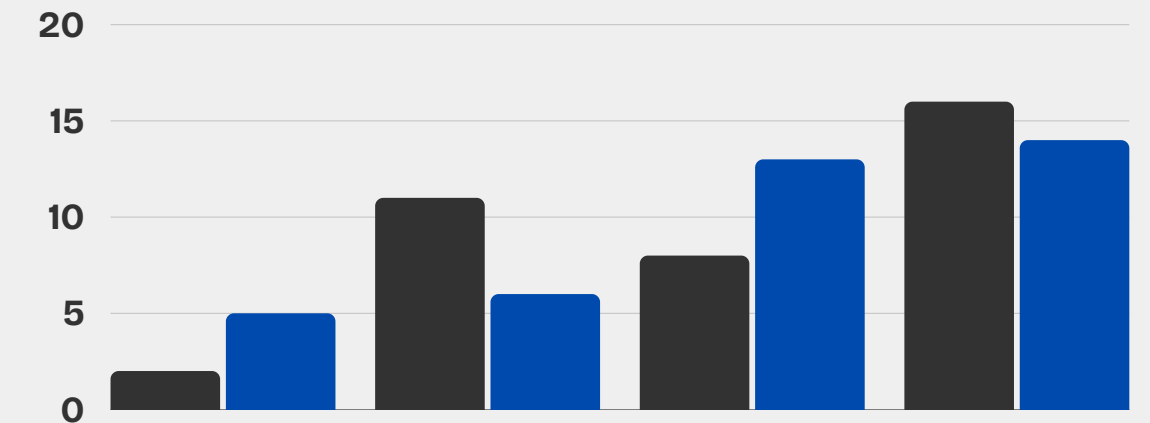
DAX Measures



```
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_Reveneue = CALCULATE(
SUM('public cc_detail'[Revenue]),
FILTER(
ALL('public cc_detail'),
'public cc_detail'[week_num2] = MAX('public cc_detail'[week_num2])))
Previous_week_Reveneue = CALCULATE(
SUM('public cc_detail'[Revenue]),
FILTER(
ALL('public cc_detail'),
'public cc_detail'[week_num2] = MAX('public
cc_detail'[week_num2])-1))
```

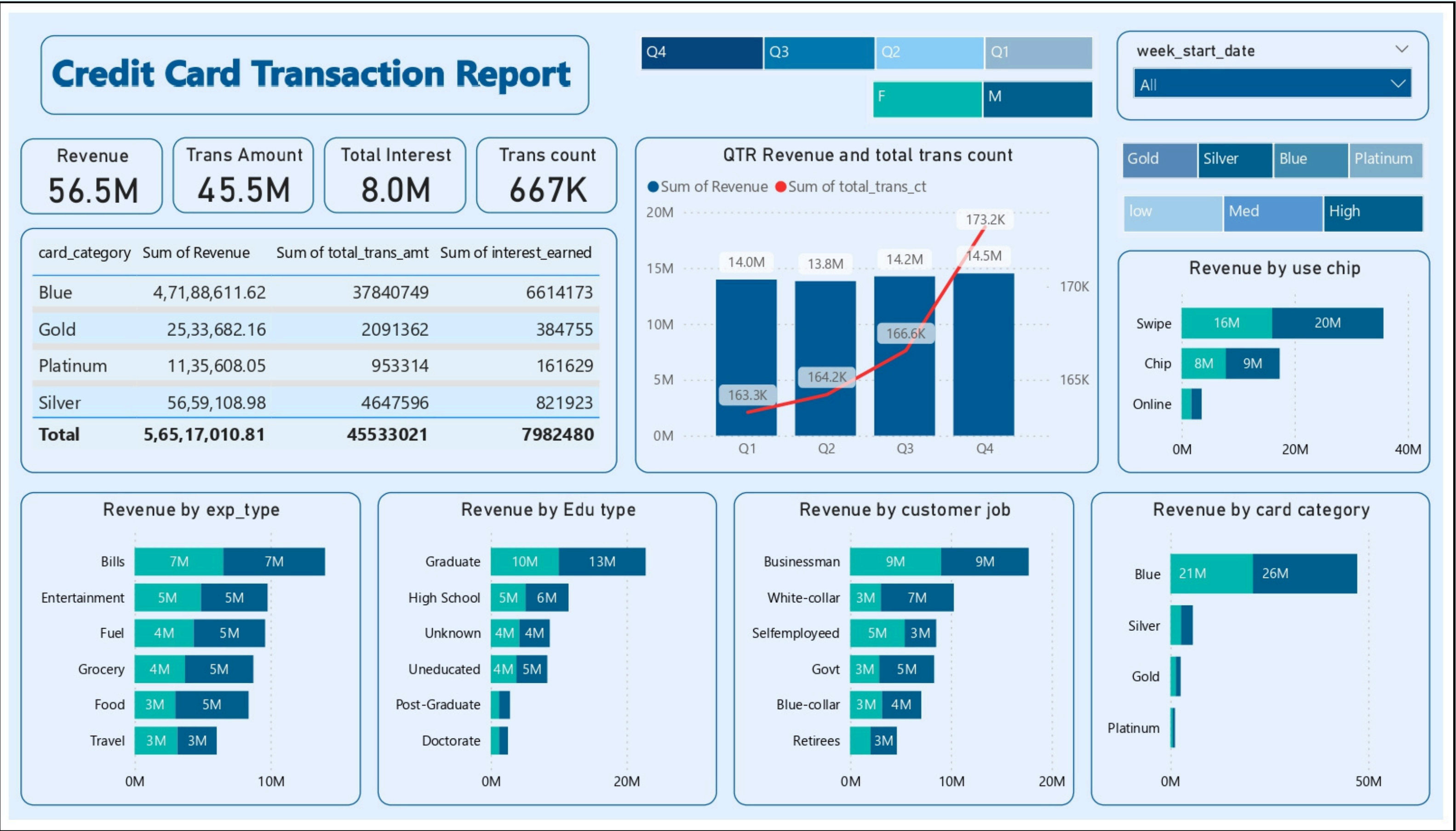
Project Insights

- Revenue increased by 28.8%
- 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%



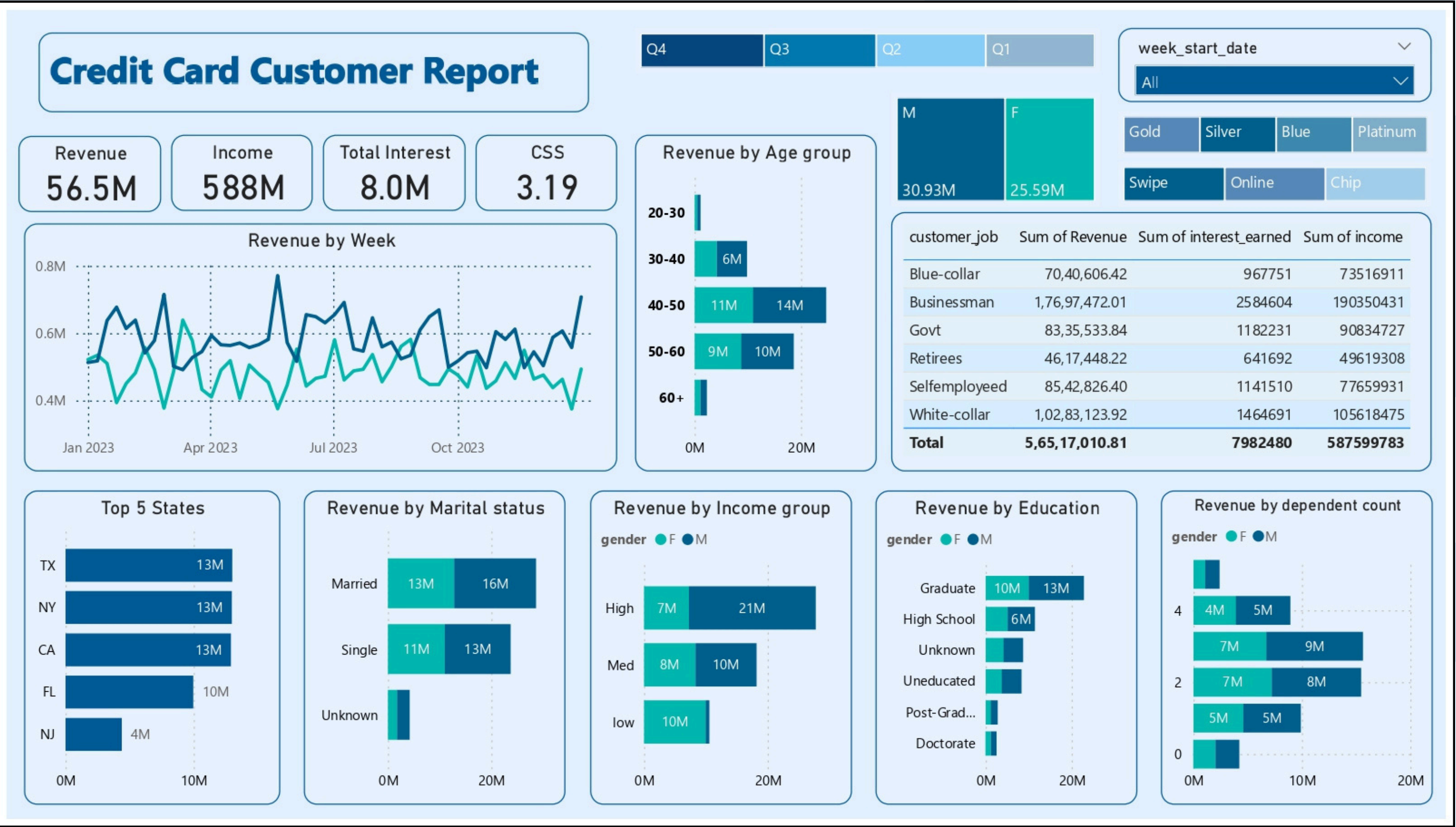
Credit Card Weekly Report

Final
Dash
board

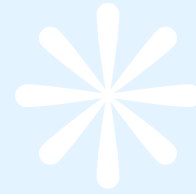


Customer weekly Report

Final Dash board



Thank You



Karthik Ch
Data Enthusiast

