Credit Card

WEEKLY
STATUS REPORT

Credit Card Transaction Report
Revenue
55M
Amount
45M
Total Interest
7.8M
Count
0.7M
Q2
Q3
Q1
Q4
Week_Start_Date
All
Blue
Gold
Platinum
Silver
F
M
Low
Med
High
Card_Category
Revenue
Total_Trans_Amt
Interest
Blue 4,61,39,397.74 36957875 64,95,887.74
Silver 55,86,332.28 4586746 8,12,081.28
Gold 24,54,072.16 2024078 3,73,784.16
Platinum 11,35,608.05 953314 1,61,629.05
Total 5,53,15,410.23 44522013 78,43,382.23
Total Revenue and Sum of Total_Trans_Count by Qtr
Sum of Revenue
Sum of Total_Trans_Vol
Q1
Q2
Q3
Q4
Total Revenue by Use Chip
Swipe
Chip
Online
Total Revenue by Exp Type
Bills
Entertainment
Fuel
Grocery
Food
Travel
Total Revenue by Education
Graduate
High School
Unknown
Uneducated
Post-Grad...
Doctorate
Total Revenue by Customer_Job
Businessman
White-collar
Selfemploy...
Govt
Blue-collar
Retirees
Total Revenue by Card
Blue
Silver
Gold
Platinum

Credit Card Customer Report
Revenue
46M
Income
479M
Total Interest
6M
CSS
3.19
Q2
Q3
Q1
Q4
Week_Start_Date
All
M
25.72M
F
20.42M
Low
Med
Hi...
Blue
Gold
Platinum
Silver
Revenue by Week
Sum of Revenue
Revenue by AgeGroup
20-30
30-40
40-50
50-60
60
Customer_Job
Revenue
Total Interest
Incom
Blue-collar 64,01,617.03 8,82,560.03 6714
Businessman 1,15,32,851.78 16,72,014.78 12226
Govt 74,48,613.44 10,57,422.44 8172
Retirees 43,42,359.55 6,05,200.55 4657
Selfemployeed 78,01,397.19 10,56,306.19 7130
White-collar 86,12,558.75 12,22,383.75 8981
Total 4,61,39,397.74 64,95,887.74 47881
Top 5 state
TX
NY
CA
FL
NJ
Revenue by Marital_Status
Married
Single
Revenue by Dependent
Revenue by Education
Revenue by IncomeGroup
High
Med
Low

Content

1. Project Objective
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4. Dashboard and insights

Objective

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

Data from SQL

1. Create tables in SQL
2. Import CSV file in SQL
3. Get data from SQL database in Power BI

DAX Queries

```
AgeGroup = SWITCH(
  TRUE(),
    customer[Customer_Age]<30,"20-30",
    customer[Customer_Age]>=30 && customer[Customer_Age]<40, "30-40",
    customer[Customer_Age]>=40 && customer[Customer_Age]<50, "40-50",
    customer[Customer_Age]>=50 && customer[Customer_Age]<60, "50-60",
    customer[Customer_Age]>=60,"60",
    "Unknown"
)
```

```
IncomeGroup = SWITCH(TRUE(),
customer[Income]<35000,"Low",
customer[Income]>=35000 && customer[Income]<70000,"Med",
customer[Income]>=70000,"High",
"Unknown"
)
```

DAX Queries

```
Revenue = credit_card[Annual_Fees]+ credit_card[Total_Trans_Amt] +
credit_card[Interest_Earned]


weeknum2 = WEEKNUM(credit_card[Week_Start_Date])


Current_week_revenue = CALCULATE(
    SUM(credit_card[Revenue]),
    FILTER(
        ALL(credit_card),
        credit_card[weeknum2]=MAX(credit_card[weeknum2])))


Previous_week_revenue = CALCULATE(
    SUM(credit_card[Revenue]),
    FILTER(
        ALL(credit_card),
        credit_card[weeknum2]=MAX(credit_card[weeknum2])-1))
```

Project Insights (52 Week, 24 Dec)

WoW change:

- Revenue decreased by 12.8%,
- Total Transaction Amt & Count increased by 1.68% & 1.78%
- Customer count increased by 1.62%

Overview YTD:

- Overall revenue is 55M
- Total interest is 6M
- Total transaction amount is 37M
- Male customers are contributing more in revenue 25.7M, female 20.4M
- Blue & Silver credit card are contributing to 93% of overall transactions
- TX, NY & CA is contributing to 73.24%
- Overall Activation rate is 57.5%
- Overall Delinquent rate is 6.07%

THANK YOU