**BANK LOAN REPORT QUERY DOCUMENT**

1. **BANK LOAN REPORT | SUMMARY**

**KPI’s:**

**Total Loan Applications**

SELECT COUNT(id) AS Total\_Loan\_Applications FROM bank\_loan\_data;



**MTD Total Loan Applications**

SELECT COUNT(id) AS MTD\_Total\_Loan\_Applications FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 12 AND YEAR(issue\_date) = 2021 ;



**PMTD Total Loan Applications**

SELECT COUNT(id) AS PMTD\_Total\_Loan\_Applications FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 11 AND YEAR(issue\_date) = 2021 ;  


**Total Funded Amount**

SELECT SUM(loan\_amount) AS MTD\_Total\_Funded\_Amount FROM bank\_loan\_data;



**MTD Total Funded Amount**

SELECT SUM(loan\_amount) AS MTD\_Total\_Funded\_Amount FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 12 AND YEAR(issue\_date) = 2021 ;  


**PMTD Total Funded Amount**

SELECT SUM(loan\_amount) AS PMTD\_Total\_Funded\_Amount FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 11 AND YEAR(issue\_date) = 2021 ;  


**Total Amount Received**

SELECT SUM(total\_payment) AS Total\_Amount\_Received FROM bank\_loan\_data;  


**Total MTD Amount Received**

SELECT SUM(total\_payment) AS MTD\_Total\_Amount\_Received FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 12 AND YEAR(issue\_date) = 2021 ;  
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**Total** **PMTD Amount Received**

SELECT SUM(total\_payment) AS PMTD\_Total\_Amount\_Received FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 11 AND YEAR(issue\_date) = 2021 ;  


**Average Interest Rate (upto 4 values)**

SELECT ROUND(AVG(int\_rate), 4)\*100 AS Avg\_Interest\_Rate FROM bank\_loan\_data;



**MTD Average Interest Rate**

SELECT ROUND(AVG(int\_rate), 4)\*100 AS MTD\_Avg\_Interest\_Rate FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 12 AND YEAR(issue\_date) = 2021 ;  


**PMTD Average Interest Rate**

SELECT ROUND(AVG(int\_rate), 4)\*100 AS PMTD\_Avg\_Interest\_Rate FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 11 AND YEAR(issue\_date) = 2021 ;  


**Average DTI**

SELECT ROUND(AVG(dti), 4)\*100 AS Avg\_DTI FROM bank\_loan\_data;  


**MTD Avg DTI**

SELECT ROUND(AVG(DTI), 4)\*100 AS MTD\_Avg\_DTI FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 12 AND YEAR(issue\_date) = 2021 ;   


**PMTD Avg DTI**

SELECT ROUND(AVG(DTI), 4)\*100 AS PMTD\_Avg\_DTI FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 11 AND YEAR(issue\_date) = 2021 ;  


**GOOD LOAN ISSUED**

**Good Loan Percentage**

SELECT

(COUNT (CASE WHEN loan\_status = 'Fully Paid' OR loan\_status = 'Current' THEN id END)\*100)

/

COUNT(id) AS Good\_Loan\_Percentage

FROM bank\_loan\_data;   


**Good Loan Applications**

SELECT COUNT(id) AS Good\_Loan\_Applications FROM bank\_loan\_data

WHERE loan\_status = 'Fully Paid' OR loan\_status = 'Current';  


**Good Loan Funded Amount**

SELECT SUM(loan\_amount) AS Good\_Loan\_Funded\_Amount FROM bank\_loan\_data

WHERE loan\_status = 'Fully Paid' OR loan\_status = 'Current';  


**Good Loan Total Received Amount**

SELECT SUM(total\_payment) AS Good\_Loan\_Received\_Amount FROM bank\_loan\_data

WHERE loan\_status = 'Fully Paid' OR loan\_status = 'Current';  


**BAD LOAN ISSUED**

**Bad Loan Percentage**

SELECT

(COUNT (CASE WHEN loan\_status = 'Charged Off' THEN id END)\*100)

/

COUNT(id) AS Bad\_Loan\_Percentage

FROM bank\_loan\_data;



**Bad Loan Applications**

SELECT COUNT(id) AS Bad\_Loan\_Applications FROM bank\_loan\_data

WHERE loan\_status = 'Charged Off';  


**Bad Loan Funded Amount**

SELECT SUM(loan\_amount) AS Bad\_Loan\_Funded\_Amount FROM bank\_loan\_data

WHERE loan\_status = 'Charged Off';  


**Bad Loan Total Received Amount**

SELECT SUM(total\_payment) AS Bad\_Loan\_Received\_Amount FROM bank\_loan\_data

WHERE loan\_status = 'Charged Off';  


**LOAN STATUS**

**LOAN STATUS**

SELECT

loan\_status,

COUNT(id) AS Total\_Loan\_Applications,

SUM(total\_payment) AS Total\_Amount\_Received,

SUM(loan\_amount) AS Total\_Funded\_Amount,

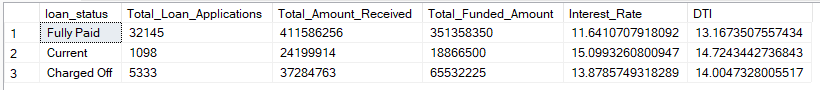
Avg(int\_rate \*100) AS Interest\_Rate,

Avg(DTI \*100) AS DTI

FROM

bank\_loan\_data

GROUP BY

loan\_status;  


SELECT

loan\_status,

SUM(total\_payment) AS MTD\_Total\_Amout\_Received,

SUM(loan\_amount) AS MTD\_Total\_Funded\_Amount

FROM

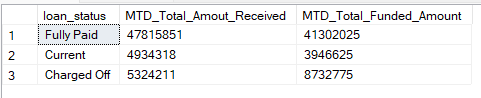
bank\_loan\_data

WHERE

MONTH(issue\_date) = 12

GROUP BY

loan\_status;



1. **BANK LOAN REPORT | OVERVIEW**

**MONTH**

SELECT

MONTH(issue\_date) AS Month\_Number,

DATENAME(MONTH, issue\_date) AS Month\_Name,

COUNT(id) AS Total\_Loan\_Applications,

SUM(loan\_amount) AS Total\_Funded\_Amount,

SUM(total\_payment) AS Total\_Amount\_Received

FROM

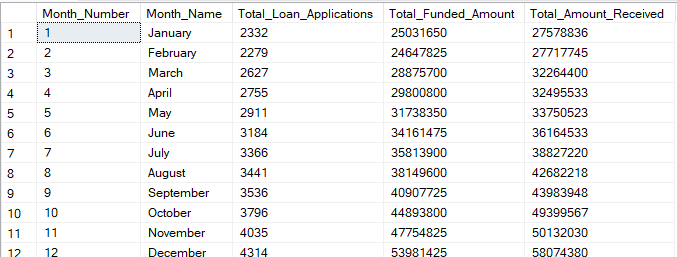
bank\_loan\_data

GROUP BY

MONTH(issue\_date), DATENAME(MONTH, issue\_date)

ORDER BY

MONTH(issue\_date), DATENAME(MONTH, issue\_date);

****

**STATE**

SELECT

address\_state AS Address,

COUNT(id) AS Total\_Loan\_Applications,

SUM(loan\_amount) AS Total\_Funded\_Amount,

SUM(total\_payment) AS Total\_Amount\_Received

FROM

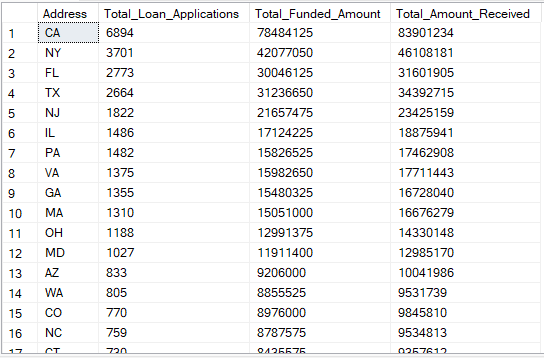
bank\_loan\_data

GROUP BY

address\_state

ORDER BY

COUNT(id) DESC;

****

**TERM**

SELECT

term AS Term,

COUNT(id) AS Total\_Loan\_Applications,

SUM(loan\_amount) AS Total\_Funded\_Amount,

SUM(total\_payment) AS Total\_Amount\_Received

FROM

bank\_loan\_data

GROUP BY

term

ORDER BY

term;

****

**EMPLOYEE LENGTH**

SELECT

emp\_length AS Employee\_Length,

COUNT(id) AS Total\_Loan\_Applications,

SUM(loan\_amount) AS Total\_Funded\_Amount,

SUM(total\_payment) AS Total\_Amount\_Received

FROM

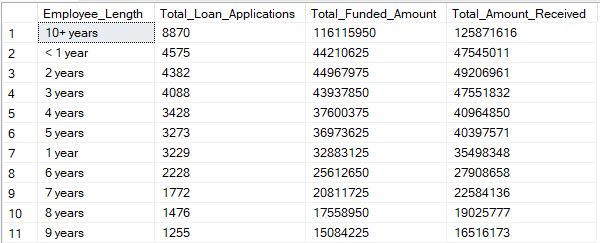
bank\_loan\_data

GROUP BY

emp\_length

ORDER BY

COUNT(id) DESC;



**PURPOSE**

SELECT

purpose AS Purpose,

COUNT(id) AS Total\_Loan\_Applications,

SUM(loan\_amount) AS Total\_Funded\_Amount,

SUM(total\_payment) AS Total\_Amount\_Received

FROM

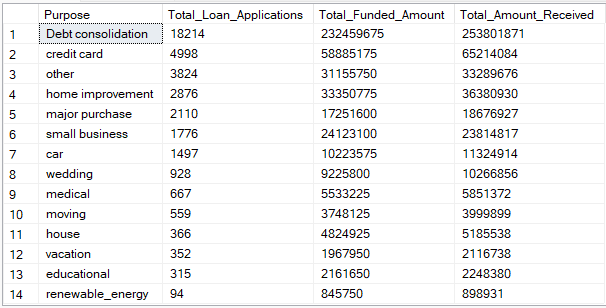
bank\_loan\_data

GROUP BY

purpose

ORDER BY

COUNT(id) DESC;



**HOME OWNERSHIP**

SELECT

home\_ownership AS Home\_OwnerShip,

COUNT(id) AS Total\_Loan\_Applications,

SUM(loan\_amount) AS Total\_Funded\_Amount,

SUM(total\_payment) AS Total\_Amount\_Received

FROM

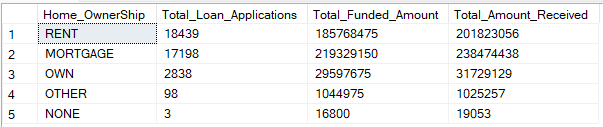
bank\_loan\_data

GROUP BY

home\_ownership

ORDER BY

COUNT(id) DESC;



*When the Grade A in the filters for dashboards:*

SELECT

home\_ownership AS Home\_OwnerShip,

COUNT(id) AS Total\_Loan\_Applications,

SUM(loan\_amount) AS Total\_Funded\_Amount,

SUM(total\_payment) AS Total\_Amount\_Received

FROM

bank\_loan\_data

WHERE

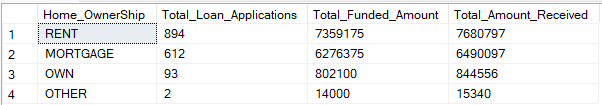
grade = 'A' AND address\_state = 'CA'

GROUP BY

home\_ownership

ORDER BY

COUNT(id) DESC;

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