

# CREDIT CARD

## WEEKLY STATUS REPORT



# 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.

# 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

## WoW change:

- Revenue decreased by 13%,
- Total Transaction Amt decreased by 349K
- Customer count decreased by 15%

## Overview YTD:

- Overall revenue is 165.95M
- Total interest is 23.53M
- Total transaction amount is 134M
- Male customers are contributing more in revenue 90.66M, female 75.28M
- Blue & Silver credit card are contributing to 94.5% of overall transactions
- TX, NY & CA is contributing to 59M
- Overall Activation rate is 57.5%
- Overall Delinquent rate is 6.07%



# Learnings

## Credit card financial dashboard using Power BI:

- 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.

