Credit Card Financial

Weekly Status Report Power BI

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.

Creating Database in PostgreSQL

```sql
-- SQL Query to create and import data from csv files:

-- 0. Create a database
CREATE DATABASE ccdb;

-- 1. Create cc_detail table

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)
);
```

```sql
-- 2. Create cc_detail table

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
);
```

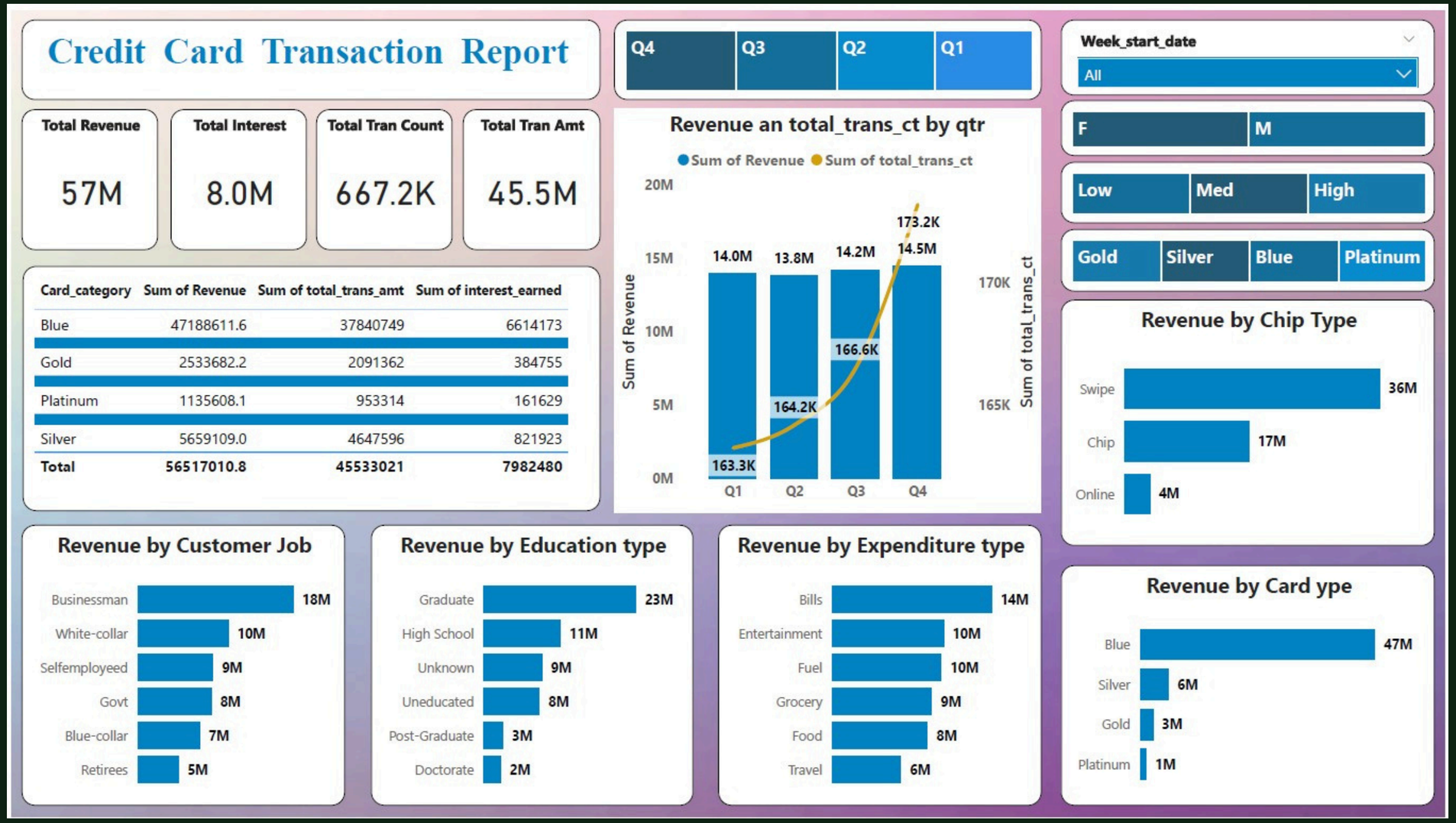
Coping Values to Table

```
-- 3. Copy csv data into SQL (remember to update the file name and file location in below query

-- copy cc_detail table

COPY cc_detail
FROM 'D:\Credit Card Financial Dashboard\Credit Card Financial Dashboard\cc_add.csv'
DELIMITER ','
CSV HEADER;

-- copy cust_detail table

COPY cust_detail
FROM 'D:\Credit Card Financial Dashboard\Credit Card Financial Dashboard\cust_add.csv'
DELIMITER ','
CSV HEADER;
```

```
-- 4. Insert additional data into SQL, using same COPY function
-- copy additional data (week-53) in cc_detail table
COPY cc_detail
FROM 'D:\cc_add.csv'
DELIMITER ','
CSV HEADER;

-- copy additional data (week-53) in cust_detail table (remember to update the file name and file location in below query)
COPY cust_detail
FROM 'D:\cust_add.csv'
DELIMITER ','
CSV HEADER;
```

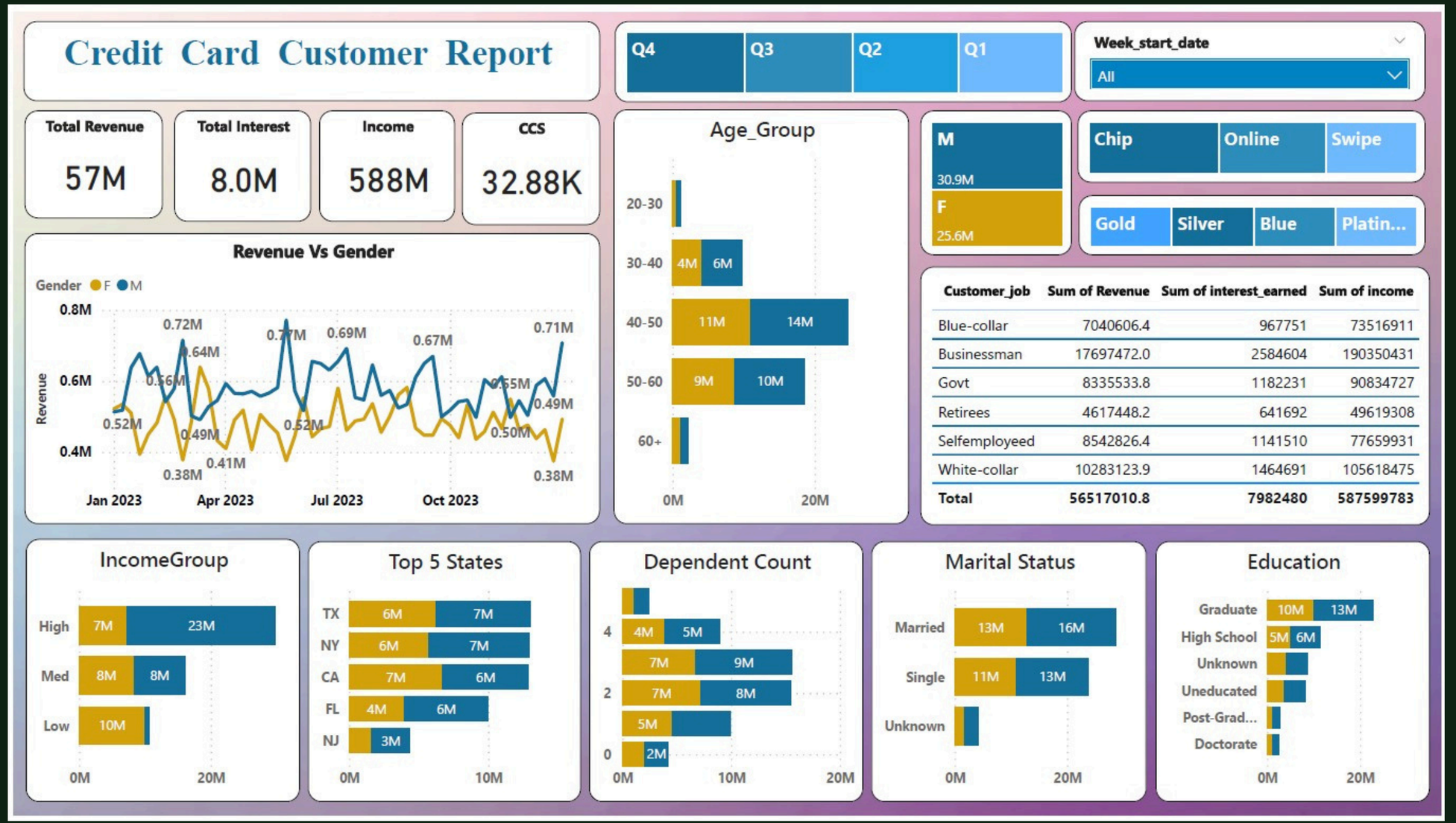
Connecting To Power Bi Through PostgreSQL

Credit Card Transaction Report



Card_category	Sum of Revenue	Sum of total_trans_amt	Sum of interest_earned
Blue	47188611.6	37840749	6614173
Gold	2533682.2	2091362	384755
Platinum	1135608.1	953314	161629
Silver	5659109.0	4647596	821923
Total	**56517010.8**	**45533021**	**7982480**

Credit Card Customer Report



Problem Statement

Dashboard:Transaction

Key Performance Indicators(KPIs)

1. Total Revenue
2. Total Interest
3. Total Transaction Count
4. Total Transaction Amount

Bar Chart

1. Revenue Vs CustomerJob
2. Revenue Vs Education Type
3. Revenue Vs Expenditure Type
4. Revenue Vs Card Type
5. Revenue Vs Chip Type

Grid View:-Card Type and Sum of Revenue, Sum of Interest, Sum of Transaction Amount

Problem Statement

Dashboard:Customer

Key Performance Indicators(KPIs)

1. Total Revenue
2. Total Interest
3. Total Income
4. Total Customer Satisfaction

Bar Chart

1. Revenue Vs Income Group
2. Revenue Vs Top 5 States
3. Revenue Vs Dependant Counts
4. Revenue Vs Martial Status
5. Revenue Vs Education Grop
6. Revenue Vs Age Group

Line Chart:-Revenue Vs Gender On Weekly basis

Grid View:-Customer job and Sum of Revenue, Sum of Interest, Sum of Income

Project Insights Week 53 (31st Dec)

Wow Changes:

- Revenue increased by 28.8%
- Total Transaction At & Count Increased By 35% & 3.4%
- Customer Count Increased By 12.8%

YTD Changes:

- Overall revenue is 57M
- Total Interest is 8M
- Total Transaction Amount is 46M
- Male Customers are contributing more in revenue 30.9M Than Female 25.6M
- Blue & Silver Credit Card are contributing to 93% of Overall transaction
- TX, NY & CA is Contributing is 68%
- Overall Activation rate is 57.5%
- Overall Delinquent rate is 6.06%

"The future belongs to those who believe in the beauty of their dreams."

— ELEANOR ROOSEVELT

Feedback

Thank you for taking the time to review my presentation. Your feedback is invaluable to me as I strive to continuously improve. Please feel free to share any thoughts or suggestions you have regarding my LinkedIn page or GitHub projects. Your insights will help me enhance my online presence and refine my work.
You can reach me via:

LinkedIn: https://www.linkedin.com/in/milind-shende/
GitHub: https://github.com/Milind-Shende/Credit-Card-Financial
You can email me at milind.shende2408@gmail.com.
Thank you once again for your input!