

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.

Steps

1. Prepare csv file
2. Create tables in SQL
3. Import csv file into SQL
4. Import data into Power BI by connecting SQL
5. Develop dashboard and gain insights.

NOTE: Find all Project data and SQL queries - [Click here](#)

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 53 (31st Dec)

Week on Week change:

- Revenue increased by 28.8%,
- Total Transaction Amt & Count increased by 34% & 3.5%
- Customer count increased by 13%

Overview YTD:

- 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%