**BANK LOAN REPORT QUERY DOCUMENT**

1. **BANK LOAN REPORT | SUMMARY**

**KPI’s:**

**Total Loan Applications**

SELECT COUNT(id) AS Total\_Loan\_Applications FROM [dbo].[Bank\_Loan\_Data]



**MTD Loan Applications**

SELECT COUNT(id) AS MTD\_Total\_Loan\_Applications FROM [dbo].[Bank\_Loan\_Data]

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



**PMTD Loan Applications**

SELECT COUNT(id) AS PMTD\_Total\_Loan\_Applications FROM [dbo].[Bank\_Loan\_Data]

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

A screenshot of a computer

AI-generated content may be incorrect.

**Total Funded Amount**

SELECT SUM(loan\_amount) AS Total\_Funded\_Amount FROM [dbo].[Bank\_Loan\_Data]

A screenshot of a computer

AI-generated content may be incorrect.

**MTD Total Funded Amount**

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

FROM [dbo].[Bank\_Loan\_Data]

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

A screen shot of a computer

AI-generated content may be incorrect.

**PMTD Total Funded Amount**

SELECT SUM(loan\_amount) AS PMTD\_Total\_Funded\_Amount

FROM [dbo].[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 [dbo].[Bank\_Loan\_Data]



**MTD Total Amount Received**

SELECT SUM(total\_payment) AS MTD\_Total\_Amount\_Received   
FROM [dbo].[Bank\_Loan\_Data]

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

****

**PMTD Total Amount Received**

SELECT SUM(total\_payment) AS PMTD\_Total\_Amount\_Received   
FROM [dbo].[Bank\_Loan\_Data]

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



**Average Interest Rate**

SELECT ROUND(AVG(int\_rate),4) \* 100 AS AVG\_Interest\_Rate   
From [dbo].[Bank\_Loan\_Data]



**MTD Average Interest Rate**

SELECT ROUND(AVG(int\_rate),4) \* 100 AS MTD\_AVG\_Interest\_Rate   
From [dbo].[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 [dbo].[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 [dbo].[Bank\_Loan\_Data]

****

**MTD Average DTI**

SELECT ROUND(AVG(dti),4) \* 100 AS MTD\_AVG\_DTI   
From [dbo].[Bank\_Loan\_Data]

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

****

**PMTD Average DTI**

SELECT ROUND(AVG(dti),4) \* 100 AS PMTD\_AVG\_DTI From [dbo].[Bank\_Loan\_Data]

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

****

**GOOD LOAN KPI’s:**

**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 [dbo].[Bank\_Loan\_Data]

****

**Good Loan Applications**

SELECT COUNT(id) AS Good\_Loan\_Total\_Applications   
FROM [dbo].[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 [dbo].[Bank\_Loan\_Data]

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

****

**Good Loan Amount Received**

SELECT SUM(total\_payment) AS Good\_Loan\_Amount\_Received   
FROM [dbo].[Bank\_Loan\_Data]

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

****

**BAD LOAN KPI’s**

**Bad Loan Percentage**

SELECT

(COUNT(CASE when loan\_status = 'Charged Off' THEN id END) \* 100.0)

/

COUNT(id) AS Bad\_Loan\_Percentage

FROM [dbo].[Bank\_Loan\_Data]

****

**Bad Loan Applications**

SELECT COUNT(id) AS Bad\_Loan\_Total\_Applications   
FROM [dbo].[Bank\_Loan\_Data]

WHERE loan\_status = 'Charged Off'

****

**Bad Loan Funded Amount**

SELECT SUM(loan\_amount) AS Bad\_Loan\_Amount\_Funded   
FROM [dbo].[Bank\_Loan\_Data]

WHERE loan\_status = 'Charged Off'

****

**Bad Loan Amount Received**

SELECT SUM(total\_payment) AS Bad\_Loan\_Amount\_Received   
FROM [dbo].[Bank\_Loan\_Data]

WHERE loan\_status = 'Charged Off'

****

**LOAN STATUS**

SELECT

loan\_status,

COUNT(id) AS Total\_Loan\_Applications,

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

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

AVG(int\_rate) AS Interest\_Rate,

AVG(dti \* 100) AS DTI

FROM [dbo].[Bank\_Loan\_Data]

GROUP BY loan\_status

**A screenshot of a white rectangular object with black text

AI-generated content may be incorrect.**

**MTD LOAN STATUS**

SELECT

loan\_status,

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

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

FROM [dbo].[Bank\_Loan\_Data]

WHERE MONTH(issue\_date) = 12

GROUP BY loan\_status

**A screenshot of a computer

AI-generated content may be incorrect.**

1. **BANK LOAN REPORT | OVERVIEW**

**MONTH**

SELECT

MONTH(issue\_date) AS Month\_Number,

DATENAME(MONTH, issue\_date) AS MONTH,

COUNT(id) AS Total\_Loan\_Applications,

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

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

FROM [dbo].[Bank\_Loan\_Data]

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

ORDER BY MONTH(issue\_date)

**A screenshot of a computer

AI-generated content may be incorrect.**

**STATE**

SELECT

address\_state AS State,

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 address\_state

A screenshot of a table

AI-generated content may be incorrect.

**LOAN 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

A screenshot of a computer

AI-generated content may be incorrect.

**EMPLOYEE LOAN LENGTH**

SELECT

emp\_length AS Emp\_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

A screenshot of a computer

AI-generated content may be incorrect.

**PURPOSE BEHIND EMPLOYEE LOAN LENGTH**

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 purpose

A screenshot of a data

AI-generated content may be incorrect.

**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 home\_ownership

A screenshot of a computer

AI-generated content may be incorrect.

*Note: We have applied multiple Filters on all the dashboards. You can check the results for the filters as well by modifying the query and comparing the results.*