

# CREDIT CARD

WEEKLY

STATUS REPORT



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# 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 table in SQL database



A database "ccdb" is created. In which two tables "cc\_detail" and "cust\_detail" are created using the following query:

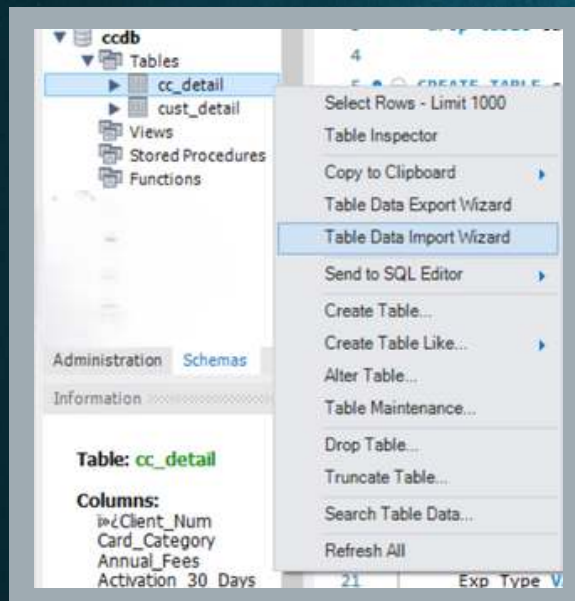
```
1 • use ccdb;
2 • drop table cc_detail;
3 • drop table cust_detail;
4
5 • CREATE TABLE cc_detail (
6     Client_Num INT,
7     Card_Category VARCHAR(20),
8     Annual_Fees INT,
9     Activation_30_Days INT,
10    Customer_Acq_Cost INT,
11    Week_Start_Date DATE,
12    Week_Num VARCHAR(20),
13    Qtr VARCHAR(10),
14    current_year INT,
15    Credit_Limit DECIMAL(10,2),
16    Total_Revolving_Bal INT,
17    Total_Trans_Amt INT,
18    Total_Trans_Ct INT,
19    Avg_Utilization_Ratio DECIMAL(10,3),
20    Use_Chip VARCHAR(10),
21    Exp_Type VARCHAR(50),
22    Interest_Earned DECIMAL(10,3),
23    Delinquent_Acc VARCHAR(5)
24 );
```

```
25
26 • CREATE TABLE cust_detail (
27     Client_Num INT,
28     Customer_Age INT,
29     Gender VARCHAR(5),
30     Dependent_Count INT,
31     Education_Level VARCHAR(50),
32     Marital_Status VARCHAR(20),
33     State_cd VARCHAR(50),
34     Zipcode VARCHAR(20),
35     Car_Owner VARCHAR(5),
36     House_Owner VARCHAR(5),
37     Personal_Loan VARCHAR(5),
38     Contact VARCHAR(50),
39     Customer_Job VARCHAR(50),
40     Income INT,
41     Cust_Satisfaction_Score INT
42 );
```



# Import data to SQL database

Using the import options in SQL as shown in picture below, the dataset is insert into the table created.



2 \* select \* from cc\_detail

InClient_Num	Card_Category	Annual_Fees	Activation_30_Days	Customer_Acq_Cost	Week_Start_Date	Week_Num	Qtr	current_year	Credit_Limit	Total_Revolving_Bal	Total_T
708082083	Blue	200	0	87	01-01-2023	Week-1	Q1	2023	3544	1661	15149
708083283	Blue	445	1	108	01-01-2023	Week-1	Q1	2023	3421	2517	992
708084558	Blue	140	0	106	01-01-2023	Week-1	Q1	2023	8258	1771	1447
708085458	Blue	250	1	150	01-01-2023	Week-1	Q1	2023	1438.3	0	3940
708086958	Blue	320	1	106	01-01-2023	Week-1	Q1	2023	3128	749	4369
708095133	Blue	100	0	94	01-01-2023	Week-1	Q1	2023	33304	1833	1448
708098133	Blue	225	1	75	01-01-2023	Week-1	Q1	2023	2834	1418	1598
708099183	Blue	400	1	75	01-01-2023	Week-1	Q1	2023	5723	1873	2732
708100533	Blue	200	1	64	01-01-2023	Week-1	Q1	2023	2679	2277	4943
708103608	Platinum	95	1	80	01-01-2023	Week-1	Q1	2023	11898	2517	15798
708104658	Blue	455	1	118	01-01-2023	Week-1	Q1	2023	1438.3	890	2928
708108333	Blue	485	0	86	01-01-2023	Week-1	Q1	2023	5990	0	1507
708112008	Blue	440	1	86	01-01-2023	Week-1	Q1	2023	22510	1049	1661
708113208	Blue	300	1	149	01-01-2023	Week-1	Q1	2023	1688	0	4375
708117933	Blue	360	0	70	01-01-2023	Week-1	Q1	2023	1880	0	2469
708119658	Blue	340	0	44	01-01-2023	Week-1	Q1	2023	12836	1034	2519
708121908	Blue	405	0	71	01-01-2023	Week-1	Q1	2023	22917	0	2045
708123033	Silver	355	0	78	01-01-2023	Week-1	Q1	2023	11463	0	14511

1 \* select \* from cust\_detail

InClient_Num	Customer_Age	Gender	Dependent_Count	Education_Level	Marital_Status	state_cd	Zipcode	Car_Owner	House_Owner	Personal_loan	contact	Customer_Job
708082083	24	F	1	Uneducated	Single	FL	91750	no	yes	no	unknown	Businessman
708083283	62	F	0	Unknown	Married	NJ	91750	no	no	no	cellular	Selfemployed
708084558	32	F	1	Unknown	Married	NJ	91750	yes	no	no	unknown	Selfemployed
708085458	38	M	2	Uneducated	Single	NY	91750	no	no	no	cellular	Blue-collar
708086958	48	M	4	Graduate	Single	TX	91750	yes	yes	no	cellular	Businessman
708095133	33	F	1	High School	Single	NY	91750	no	yes	no	cellular	Selfemployed
708098133	34	F	3	Graduate	Single	CA	91750	yes	no	no	telephone	Selfemployed
708099183	34	F	2	Uneducated	Single	CA	91750	no	no	no	cellular	Retrees
708100533	48	M	2	High School	Married	NJ	91750	yes	no	no	telephone	Businessman
708103608	53	F	1	Graduate	Married	NJ	91750	yes	yes	no	cellular	Businessman
708104658	31	F	0	Post-Graduate	Single	CA	91750	no	yes	no	telephone	Businessman
708108333	34	F	4	Graduate	Single	NY	91750	no	no	no	cellular	Selfemployed
708112008	51	F	2	Graduate	Single	NJ	91750	yes	yes	no	cellular	Selfemployed
708113208	36	M	1	High School	Single	NJ	91750	yes	no	no	telephone	White-collar
708117933	49	F	4	Graduate	Married	CA	91750	no	yes	no	unknown	Retrees
708119658	53	F	2	Graduate	Single	FL	91750	yes	no	no	cellular	Govt
708121908	49	F	1	Graduate	Married	TX	91750	no	no	no	unknown	Selfemployed
708123033	47	F	5	Graduate	Married	FL	91750	no	no	no	cellular	Businessman
708125733	43	F	4	Graduate	Single	FL	91750	no	no	no	cellular	Retrees

# Import data from SQL database to Power BI



Further Steps in Power BI Analysis,  
In Power BI the SQL database “ccdb” is linked to extract the previously created “cc\_detail” and “cust\_detail” tables.

The following steps will be undertaken:

1. Data Cleaning: We will perform necessary data cleaning in Power Query to ensure the data is accurate and ready for analysis.
2. New Measures: We will include new measures using DAX functions to enhance our analysis.

These steps will help us gain deeper insights and make informed decisions based on the data.



# Project Insights- Week 53 (31st Dec)

## WoW change:

- Revenue increased by 28.8%
- Total Transaction Amt & Count increased by 2.22% & 1.80%

## 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%

