CREDIT CARD

WEEKLY

STATUS REPORT

Content in this tutorial video

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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

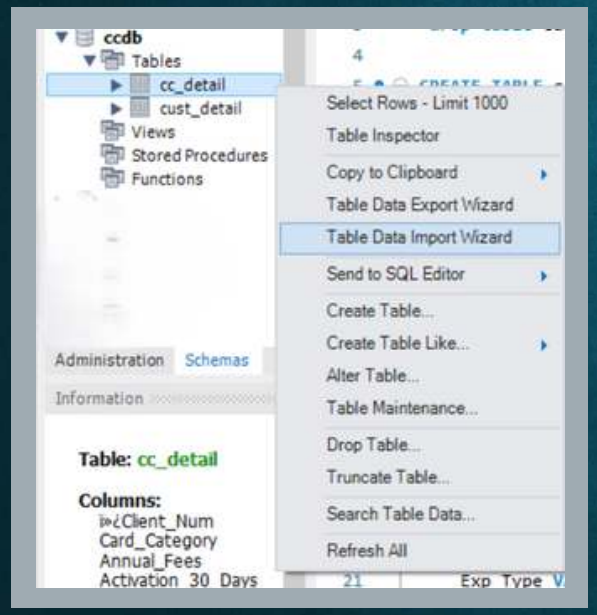
A database "ccdb" is created. In which two tables "cc_detail" and "cust_detail" are created using the following query:

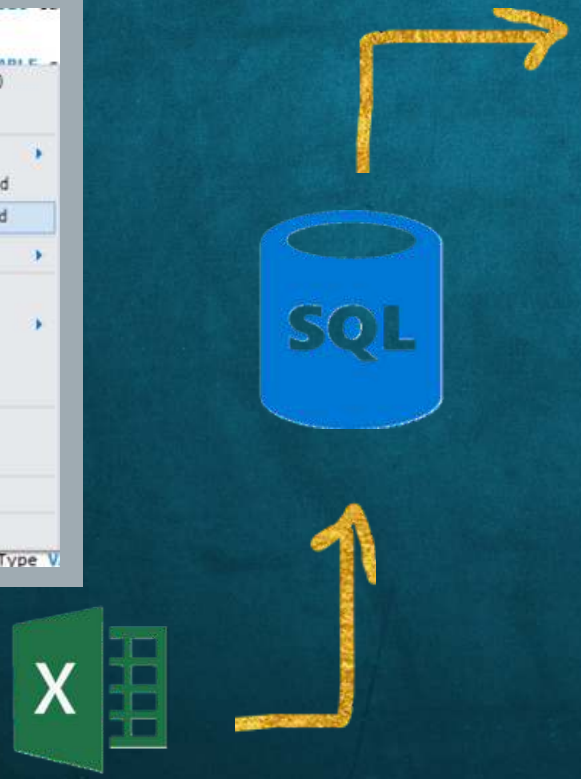
```sql
use ccdb;
drop table cc_detail;
drop table cust_detail;

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)
);
```

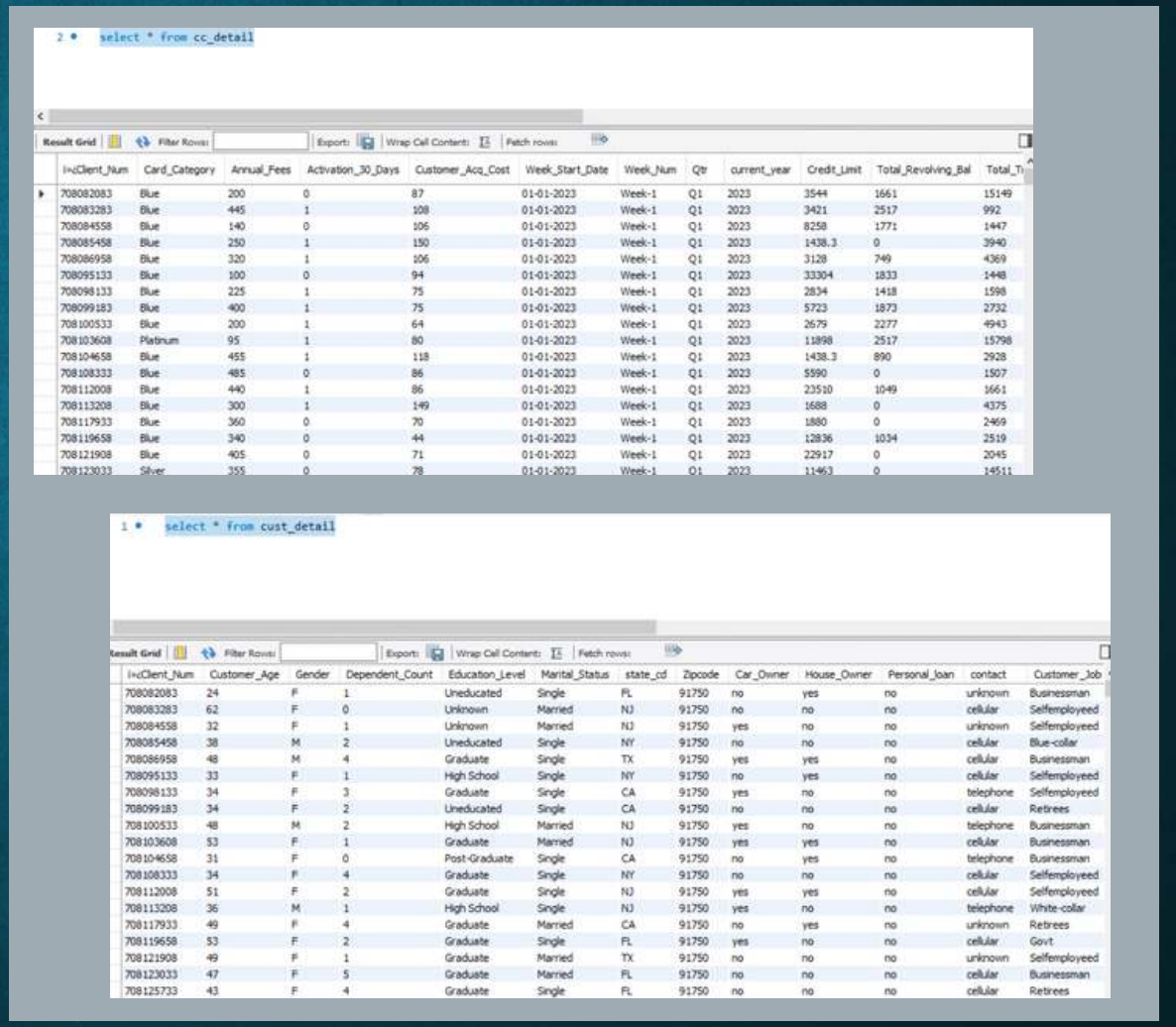
```sql
CREATE TABLE cust_detail (
    Client_Num INT,
    Customer_Age INT,
    Gender VARCHAR(5),
    Dependent_Count INT,
    Education_Level VARCHAR(50),
    Marital_Status VARCHAR(20),
    State_cd VARCHAR(50),
    Zipcode VARCHAR(20),
    Car_Owner VARCHAR(5),
    House_Owner VARCHAR(5),
    Personal_Loan VARCHAR(5),
    Contact VARCHAR(50),
    Customer_Job VARCHAR(50),
    Income INT,
    Cust_Satisfaction_Score INT
);
```

Import data to SQL database

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







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%