



Banking Dashboard Analysis

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DATA ANALYST | POWER BI | SQL | EXCEL





PROJECT OVERVIEW

OBJECTIVE:

TO ANALYZE AND VISUALIZE BANKING DATA TO DERIVE INSIGHTS INTO CUSTOMER SEGMENTS, LOAN PERFORMANCE, DEPOSIT TRENDS, AND ASSET DISTRIBUTION.

TOOLS USED:

POWER BI

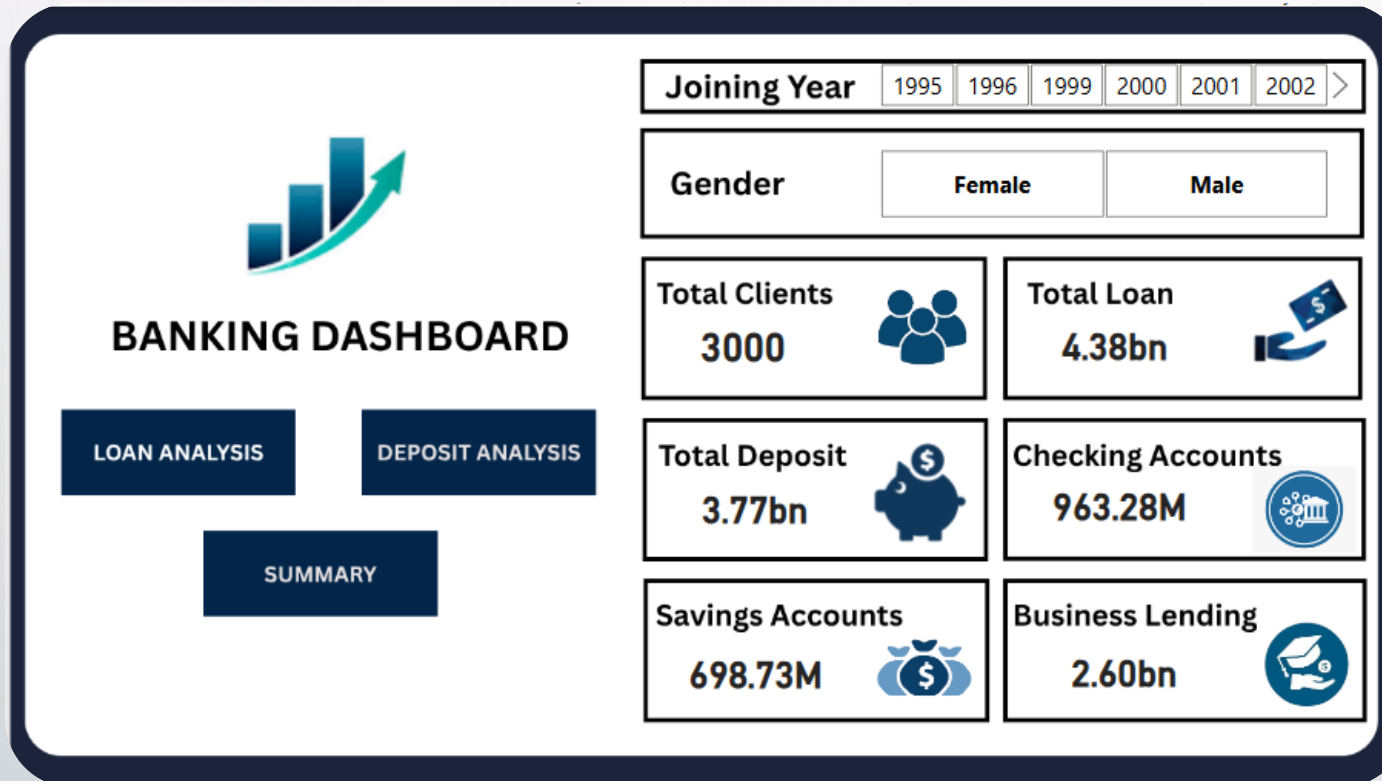
EXCEL

DAX

DATA MODELING



Summary Dashboard



KEY METRICS SHOWN:

- TOTAL CLIENTS: 3000
- TOTAL LOAN: 4.38BN
- TOTAL DEPOSIT: 3.77BN
- CHECKING ACCOUNTS: 963.28M
- SAVINGS ACCOUNTS: 698.73M
- BUSINESS LENDING: 2.60BN

FILTERS APPLIED:

- GENDER
- JOINING YEAR



Loan Analysis Dashboard

PURPOSE:

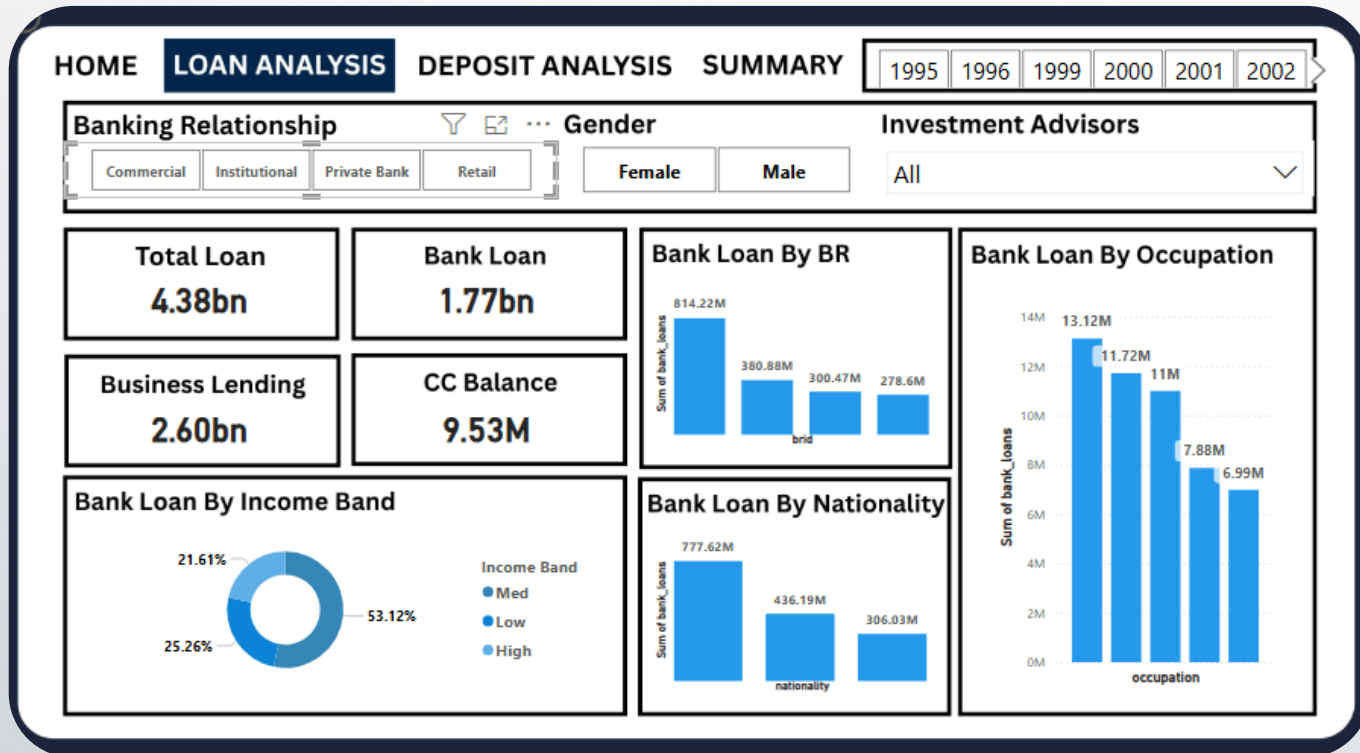
TO EXPLORE THE DISTRIBUTION OF LOAN AMOUNTS BASED ON DEMOGRAPHICS AND RELATIONSHIP TYPE.

KEY VISUALS:

- BANK LOAN BY BRANCH (BR)
- BANK LOAN BY NATIONALITY
- BANK LOAN BY OCCUPATION
- INCOME BAND DISTRIBUTION
- CREDIT CARD (CC) BALANCE

INSIGHT:

HIGHEST LOANS ARE ISSUED TO PRIVATE BANK CLIENTS WITH MEDIUM INCOME RANGE.



Deposit Analysis Dashboard

PURPOSE:

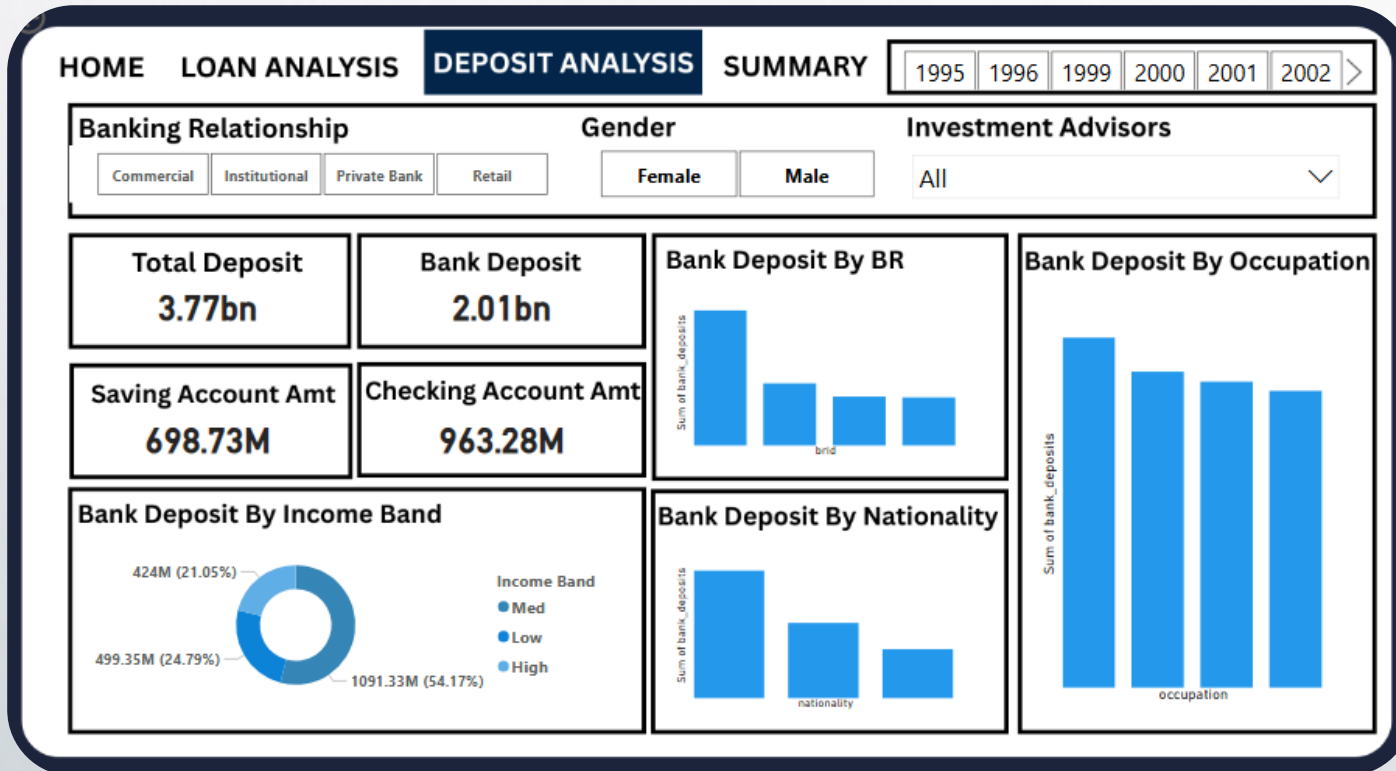
TO UNDERSTAND DEPOSIT PATTERNS
ACROSS ACCOUNTS, BRANCHES, AND
INCOME LEVELS.

KEY VISUALS:

- TOTAL DEPOSIT BY RELATIONSHIP
- DEPOSIT BY NATIONALITY
- DEPOSIT BY OCCUPATION
- SAVING & CHECKING ACCOUNT
BREAKDOWN
- DEPOSIT BY INCOME BAND

INSIGHT:

HIGH-INCOME CLIENTS HOLD THE
MAJORITY OF TOTAL DEPOSITS.



Summary Page Dashboard

PURPOSE:

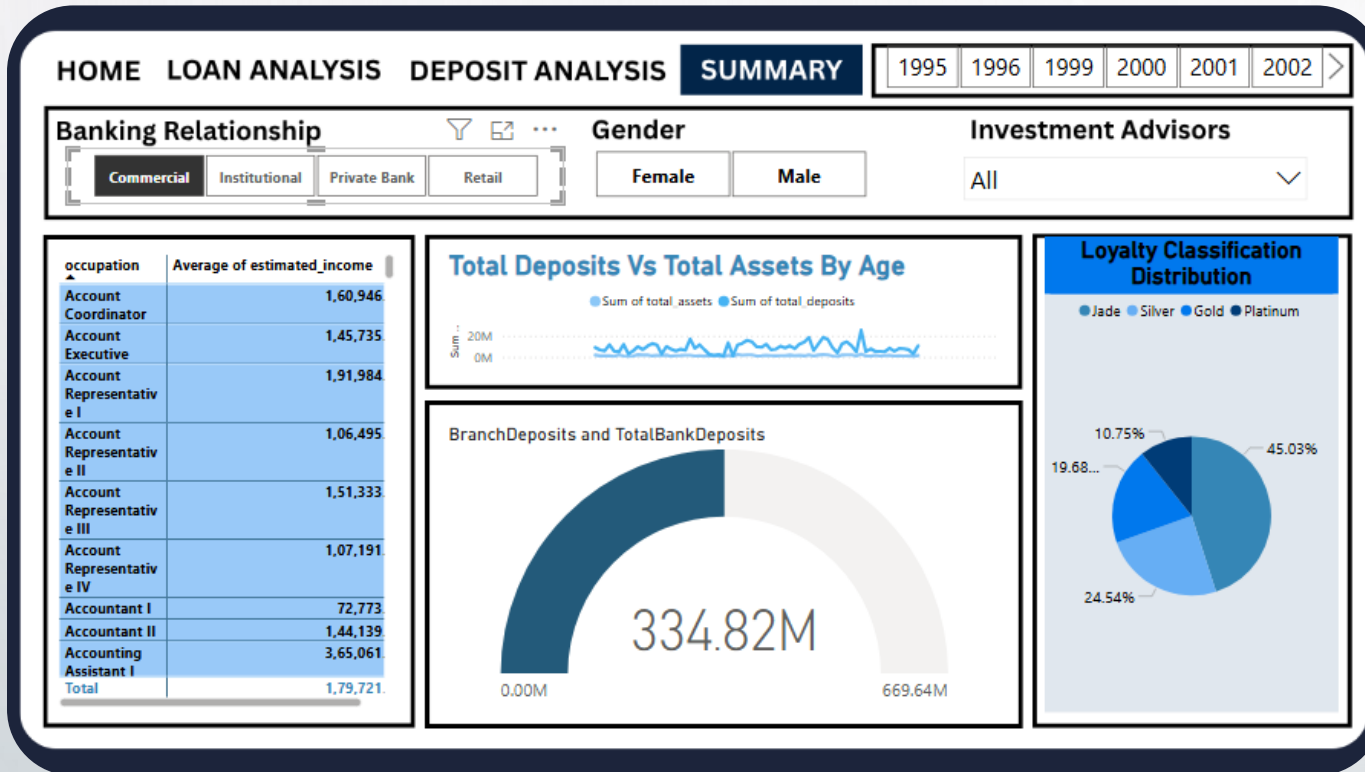
TO SHOW CUMULATIVE BANK
PERFORMANCE INSIGHTS.

KEY VISUALS:

- TOTAL DEPOSITS VS. TOTAL ASSETS BY AGE
- AVG. ESTIMATED INCOME BY OCCUPATION
- BRANCH DEPOSIT KPI GAUGE
- LOYALTY CLASSIFICATION PIE (JADE, SILVER, GOLD, PLATINUM)

INSIGHT:

MAJORITY OF LOYAL CUSTOMERS
BELONG TO THE "JADE" CATEGORY.



Conclusion

SUMMARY:

- DATA-DRIVEN DECISIONS CAN HELP SEGMENT HIGH-VALUE CLIENTS.
- BRANCH-LEVEL MONITORING IMPROVES FINANCIAL PLANNING.
- CLIENT CLASSIFICATION SUPPORTS BETTER CUSTOMER ENGAGEMENT.

NEXT STEPS:

- INTEGRATE PREDICTIVE ANALYTICS
- ADD REAL-TIME REFRESH USING POWER BI SERVICE

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