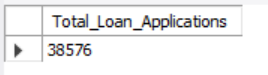
**Bank Loan Report Query Document**

1. **Bank Loan Report | Summary**

**KPI’s:**

**Total Loan Applications**

**Select count(id) AS Total\_Loan\_Applications from finance;**

****

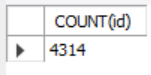
**MTD Loan Applications**

**SELECT COUNT(id)**

**FROM finance**

**WHERE STR\_TO\_DATE(issue\_date, '%Y-%m-%d') IS NOT NULL**

**AND MONTH(STR\_TO\_DATE(issue\_date, '%Y-%m-%d')) = 12;**

****

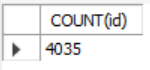
**PMTD Loan Applications**

**SELECT COUNT(id)**

**FROM finance**

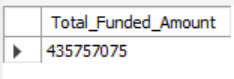
**WHERE STR\_TO\_DATE(issue\_date, '%Y-%m-%d') IS NOT NULL**

**AND MONTH(STR\_TO\_DATE(issue\_date, '%Y-%m-%d')) = 11;**

****

**Total Funded Amount**

**SELECT SUM(loan\_amount) AS Total\_Funded\_Amount FROM finance;**

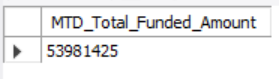
****

**MTD Total Funded Amount**

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

**WHERE STR\_TO\_DATE(issue\_date, '%Y-%m-%d') IS NOT NULL**

**AND MONTH(STR\_TO\_DATE(issue\_date, '%Y-%m-%d')) = 12;**

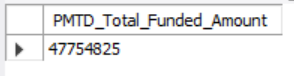
****

**PMTD Total Funded Amount**

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

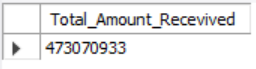
**WHERE STR\_TO\_DATE(issue\_date, '%Y-%m-%d') IS NOT NULL**

**AND MONTH(STR\_TO\_DATE(issue\_date, '%Y-%m-%d')) = 11;**

****

**Total Amount Received**

**SELECT SUM(total\_payment) AS Total\_Amount\_Recevived FROM finance;**

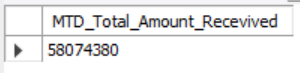
****

**MTD Total Amount Received**

**SELECT SUM(total\_payment) AS MTD\_Total\_Amount\_Recevived FROM finance**

**WHERE STR\_TO\_DATE(issue\_date, '%Y-%m-%d') IS NOT NULL**

**AND MONTH(STR\_TO\_DATE(issue\_date, '%Y-%m-%d')) = 12;**

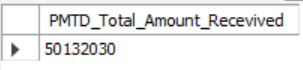
****

**PMTD Total Amount Received**

**SELECT SUM(total\_payment) AS PMTD\_Total\_Amount\_Recevived FROM finance**

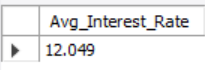
**WHERE STR\_TO\_DATE(issue\_date, '%Y-%m-%d') IS NOT NULL**

**AND MONTH(STR\_TO\_DATE(issue\_date, '%Y-%m-%d')) = 11;**

****

**Average Interest Rate**

**SELECT ROUND(AVG(int\_rate), 5) \* 100 AS Avg\_Interest\_Rate FROM finance;**

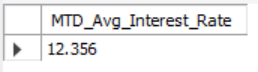
****

**MTD Average Interest Rate**

**SELECT ROUND(AVG(int\_rate), 5) \* 100 AS MTD\_Avg\_Interest\_Rate FROM finance**

**WHERE STR\_TO\_DATE(issue\_date, '%Y-%m-%d') IS NOT NULL**

**AND MONTH(STR\_TO\_DATE(issue\_date, '%Y-%m-%d')) = 12;**

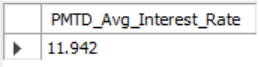
****

**PMTD Average Interest Rate**

**SELECT ROUND(AVG(int\_rate), 5) \* 100 AS PMTD\_Avg\_Interest\_Rate FROM finance**

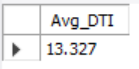
**WHERE STR\_TO\_DATE(issue\_date, '%Y-%m-%d') IS NOT NULL**

**AND MONTH(STR\_TO\_DATE(issue\_date, '%Y-%m-%d')) = 11;**

****

**Average DTI**

**SELECT ROUND(AVG(dti), 5) \* 100 AS Avg\_DTI FROM finance;**

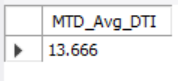
****

**MTD Average DTI**

**SELECT ROUND(AVG(dti), 5) \* 100 AS MTD\_Avg\_DTI FROM finance**

**WHERE STR\_TO\_DATE(issue\_date, '%Y-%m-%d') IS NOT NULL**

**AND MONTH(STR\_TO\_DATE(issue\_date, '%Y-%m-%d')) = 12;**

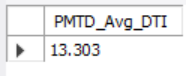
****

**PMTD Average DTI**

**SELECT ROUND(AVG(dti), 5) \* 100 AS PMTD\_Avg\_DTI FROM finance**

**WHERE STR\_TO\_DATE(issue\_date, '%Y-%m-%d') IS NOT NULL**

**AND MONTH(STR\_TO\_DATE(issue\_date, '%Y-%m-%d')) = 11;**

****

**Good Loan Issued:**

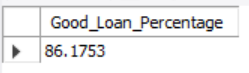
**Good Loan Applications Percentage**

**SELECT**

**(COUNT(CASE WHEN loan\_status = 'FULLY Paid' OR loan\_status = 'Current' THEN id END) \* 100)**

**/**

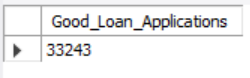
**COUNT(id) AS Good\_Loan\_Percentage FROM finance;**

****

**Good Loan Applications**

**SELECT COUNT(id) AS Good\_Loan\_Applications FROM finance**

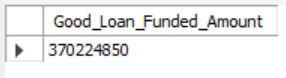
**WHERE loan\_status = 'Fully Paid' OR loan\_status = 'Current';**

****

**Good Loan Funded Amount**

**SELECT SUM(loan\_amount) AS Good\_Loan\_Funded\_Amount FROM finance**

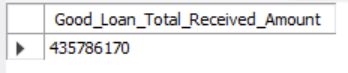
**WHERE loan\_status = 'Fully Paid' OR loan\_status = 'Current';**

****

**Good Loan Total Received Amount**

**SELECT SUM(total\_payment) AS Good\_Loan\_Total\_Received\_Amount FROM finance**

**WHERE loan\_status = 'Fully Paid' OR loan\_status = 'Current’;**

****

**Bad Loan Issued:**

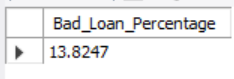
**Bad Loan Applications Percentage**

**SELECT**

**(COUNT(CASE WHEN loan\_status = 'Charged Off' THEN id END) \* 100)**

**/**

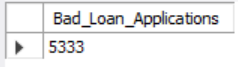
**COUNT(id) AS Bad\_Loan\_Percentage FROM finance;**

****

**Bad Loan Applications**

**SELECT COUNT(id) AS Bad\_Loan\_Applications FROM finance**

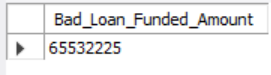
**WHERE loan\_status = 'Charged Off';**

****

**Bad Loan Funded Amount**

**SELECT SUM(loan\_amount) AS Bad\_Loan\_Funded\_Amount FROM finance**

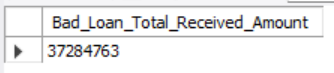
**WHERE loan\_status = 'Charged Off';**

****

**Bad Loan Total Received Amount**

**SELECT SUM(total\_payment) AS Bad\_Loan\_Total\_Received\_Amount FROM finance**

**WHERE loan\_status = 'Charged Off';**

****

**Loan Status:**

**Loan Status**

**SELECT**

**loan\_status,**

**COUNT(id) AS Loan\_Count,**

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

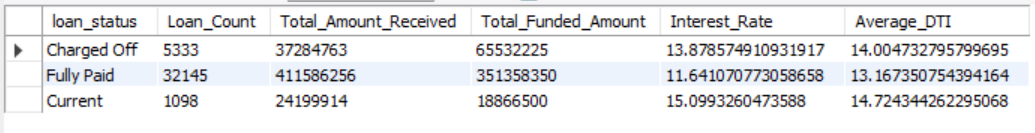
**SUM(loan\_amount) AS Total\_Funded\_Amount,**

**AVG(int\_rate \* 100) AS Interest\_Rate,**

**AVG(dti \* 100) AS Average\_DTI**

**FROM finance**

**GROUP BY loan\_status;**

****

**MTD Loan Status**

**SELECT**

**loan\_status,**

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

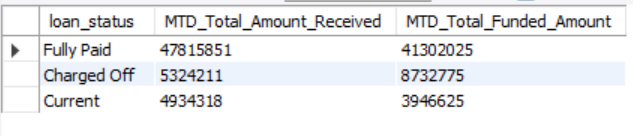
**SUM(loan\_amount) AS MTD\_Total\_Funded\_Amount**

**FROM finance**

**WHERE STR\_TO\_DATE(issue\_date, '%Y-%m-%d') IS NOT NULL**

**AND MONTH(STR\_TO\_DATE(issue\_date, '%Y-%m-%d')) = 12**

**GROUP BY loan\_status;**

****

1. **Bank Loan Report | Overview**

**Monthly Trend**

**SELECT**

**MONTHNAME(STR\_TO\_DATE(issue\_date, '%Y-%m-%d')) AS Month\_Name,**

**COUNT(id) AS Total\_Loan\_Applications,**

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

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

**FROM finance**

**GROUP BY MONTH(STR\_TO\_DATE(issue\_date, '%Y-%m-%d')),**

**MONTHNAME(STR\_TO\_DATE(issue\_date, '%Y-%m-%d'))**

**ORDER BY MONTH(STR\_TO\_DATE(issue\_date, '%Y-%m-%d'));**

****

**Regional Trend**

**SELECT**

**address\_state,**

**COUNT(id) AS Total\_Loan\_Applications,**

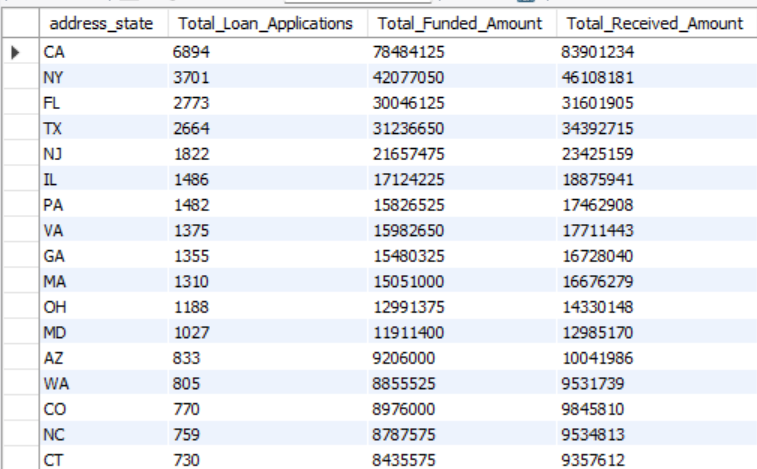
**SUM(loan\_amount) AS Total\_Funded\_Amount,**

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

**FROM finance**

**GROUP BY address\_state**

**ORDER BY COUNT(id) DESC;**

****

**Loan Term**

**SELECT**

**term,**

**COUNT(id) AS Total\_Loan\_Applications,**

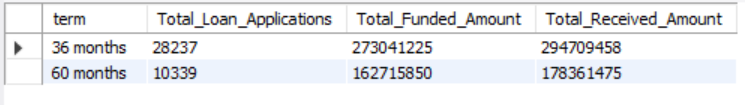
**SUM(loan\_amount) AS Total\_Funded\_Amount,**

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

**FROM finance**

**GROUP BY term**

**ORDER BY term;**

****

**Employee Length**

**SELECT**

**emp\_length,**

**COUNT(id) AS Total\_Loan\_Applications,**

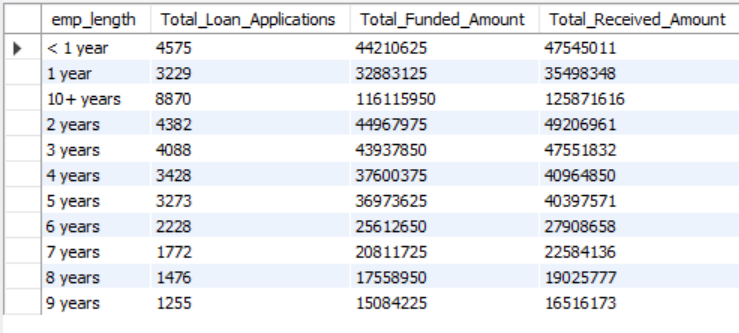
**SUM(loan\_amount) AS Total\_Funded\_Amount,**

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

**FROM finance**

**GROUP BY emp\_length**

**ORDER BY emp\_length;**

****

**Loan Purpose**

**SELECT**

**purpose,**

**COUNT(id) AS Total\_Loan\_Applications,**

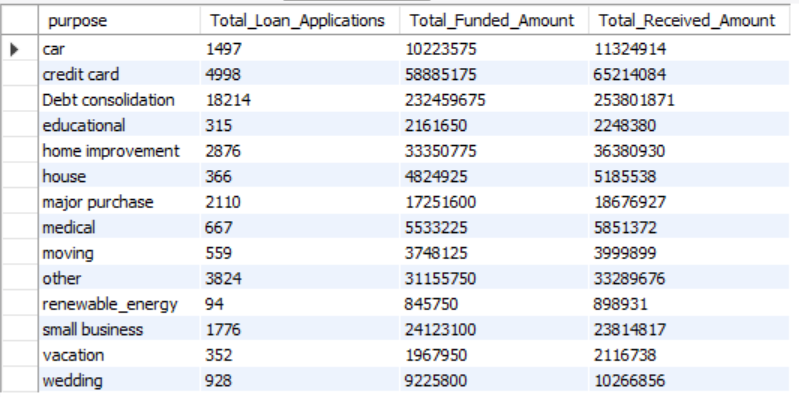
**SUM(loan\_amount) AS Total\_Funded\_Amount,**

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

**FROM finance**

**GROUP BY purpose**

**ORDER BY purpose;**

****

**Home Ownership**

**SELECT**

**home\_ownership,**

**COUNT(id) AS Total\_Loan\_Applications,**

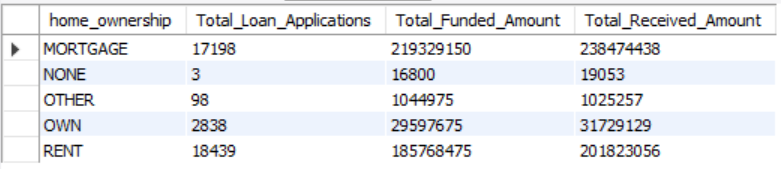
**SUM(loan\_amount) AS Total\_Funded\_Amount,**

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

**FROM finance**

**GROUP BY home\_ownership**

**ORDER BY home\_ownership;**

****