**CREDIT CARD WEEKLY STATUS REPORT**

# 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.

# Download Data

# GitHub

****[**https://github.com/rishabhnmishra/Credit\_Card\_Financial\_Dashboard**](https://github.com/rishabhnmishra/Credit_Card_Financial_Dashboard)

Or

Google Drive

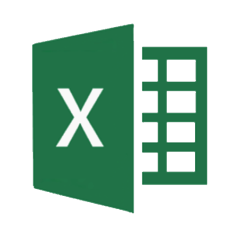
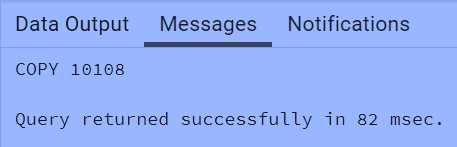


# Import data to SQL database

1. Prepare CSV file

2. Create tables in SQL

3. import CSV file into SQL





SQL Queries:

-- 0. Create a database

CREATE DATABASE ccdb1;

- 1. Create cc\_detail table

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)

);

-- 2. Create cust\_detail table

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

);

-- 3. Copy csv data into SQL (remember to update the file name and file location in below query)

-- copy cc\_detail table

COPY cust\_detail

COPY cc\_detail

FROM 'C:\Program Files\PostgreSQL\15\data\CREDITCARD DASHBORAD\credit\_card.csv'

DELIMITER ','

CSV HEADER

COPY cust\_detail

FROM 'C:\Program Files\PostgreSQL\15\data\CREDITCARD DASHBORAD\customer.csv'

DELIMITER ','

CSV HEADER

SELECT \* FROM cc\_detail

SELECT \* FROM cust\_detail

Note: after additional weekly data add in Postgrey SQL

COPY cc\_detail

FROM 'C:\Program Files\PostgreSQL\15\data\CREDITCARD DASHBORAD\cc\_add.csv'

DELIMITER ','

CSV HEADER;

COPY cust\_detail

FROM 'C:\Program Files\PostgreSQL\15\data\CREDITCARD DASHBORAD\cust\_add.csv'

DELIMITER ','

CSV HEADER;

SELECT \* FROM cc\_detail

SELECT \* FROM cust\_detail

# DAX Queries

1. **AgeGroup** = SWITCH(

TRUE(),

'public cust\_detail'[customer\_age] < 30, "20-30",

'public cust\_detail'[customer\_age] >= 30 && 'public cust\_detail'[customer\_age] < 40, "30-40",

'public cust\_detail'[customer\_age] >= 40 && 'public cust\_detail'[customer\_age] < 50, "40-50",

'public cust\_detail'[customer\_age] >= 50 && 'public cust\_detail'[customer\_age] < 60, "50-60", 'public cust\_detail'[customer\_age] >= 60, "60+",

 "unknown"

)

1. **IncomeGroup** = SWITCH(

TRUE(),

'public cust\_detail'[income] < 35000, "Low",

'public cust\_detail'[income] >= 35000 && 'public cust\_detail'[income] <70000, "Med",

'public cust\_detail'[income] >= 70000, "High",

"unknown"

)

# DAX Queries

1. **week\_num2** = WEEKNUM('public cc\_detail'[week\_start\_date])
2. **Revenue** = 'public cc\_detail'[annual\_fees] + 'public cc\_detail'[total\_trans\_amt] + 'public cc\_detail'[interest\_earned]
3. **Current\_week\_Reveneue** = CALCULATE(

 SUM('public cc\_detail'[Revenue]),

FILTER(

ALL('public cc\_detail'),

'public cc\_detail'[week\_num2] = MAX('public cc\_detail'[week\_num2])))

1. **Previous\_week\_Reveneue** = CALCULATE(

SUM('public cc\_detail'[Revenue]),

FILTER(

ALL('public cc\_detail'),

'public cc\_detail'[week\_num2] = MAX('public cc\_detail'[week\_num2])-1))

1. **Week\_Over\_week\_revenue =** DIVIDE(([Current\_week\_Reveneue] - [Previous\_week\_Reveneue]), [Previous\_week\_Reveneue])

# Project Insights- Week 53 (31st Dec)

**Week over Week change:**

* Revenue increased by 28.8%,
* Total Transaction Amt & Count increased by xx% & xx%
* Customer count increased by xx% **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%