**BANK LOAN REPORT QUERY DOCUMENT**

1. **BANK LOAN REPORT | SUMMARY**

**KPI’s:**

**Total Loan Applications**

SELECT COUNT(id) AS Total\_Loan\_Applications FROM bankloan.financial\_loan

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**MTD Loan Applications**

SELECT COUNT(id) AS MTD\_Total\_Loan\_Applications

FROM bankloan.financial\_loan

WHERE MONTH(issue\_date) = (SELECT MAX(MONTH(issue\_date)) FROM bankloan.financial\_loan)

AND YEAR(issue\_date) = (SELECT MAX(YEAR(issue\_date)) FROM bankloan.financial\_loan);



**PMTD Loan Applications**

SELECT COUNT(id) AS PMTD\_Total\_Loan\_Applications

FROM bankloan.financial\_loan

WHERE MONTH(issue\_date)=(SELECT MAX(MONTH(issue\_date)) FROM bankloan.financial\_loan)-1

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**Total Funded Amount**

SELECT SUM(loan\_amount) AS Total\_Funded\_Amount FROM bankloan.financial\_loan;

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**MTD Total Funded Amount**

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

FROM bankloan.financial\_loan

WHERE MONTH(issue\_date) = (SELECT MAX(MONTH(issue\_date)) FROM bankloan.financial\_loan)

AND YEAR(issue\_date) = (SELECT MAX(YEAR(issue\_date)) FROM bankloan.financial\_loan);



**PMTD Total Funded Amount**

SELECT SUM(loan\_amount) AS PMTD\_Total\_Loan\_Applications

FROM bankloan.financial\_loan

WHERE MONTH(issue\_date)=(SELECT MAX(MONTH(issue\_date)) FROM bankloan.financial\_loan)-1

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**Total Amount Received**

SELECT SUM(total\_payment) AS Total\_Amount\_Received FROM bankloan.financial\_loan

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**MTD Total Amount Received**

SELECT SUM(total\_payment) AS MTD\_Total\_Amount\_Received FROM bankloan.financial\_loan

WHERE MONTH(issue\_date) = (SELECT MAX(MONTH(issue\_date)) FROM bankloan.financial\_loan)

AND YEAR(issue\_date) = (SELECT MAX(YEAR(issue\_date)) FROM bankloan.financial\_loan);



**PMTD Total Amount Received**

SELECT SUM(total\_payment) AS PMTD\_Total\_Amount\_Received FROM bankloan.financial\_loan WHERE MONTH(issue\_date)=(SELECT MAX(MONTH(issue\_date)) FROM bankloan.financial\_loan)-1

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**Average Interest Rate**

SELECT AVG(int\_rate)\*100 AS Avg\_Int\_Rate FROM bankloan.financial\_loan

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**MTD Average Interest**

SELECT AVG(int\_rate)\*100 AS MTD\_Avg\_Int\_Rate FROM bankloan.financial\_loan

WHERE MONTH(issue\_date) = (SELECT MAX(MONTH(issue\_date)) FROM bankloan.financial\_loan)

AND YEAR(issue\_date) = (SELECT MAX(YEAR(issue\_date)) FROM bankloan.financial\_loan);

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Description automatically generated

**PMTD Average Interest**

SELECT AVG(int\_rate)\*100 AS PMTD\_Avg\_Int\_Rate FROM bankloan.financial\_loan

WHERE MONTH(issue\_date)=(SELECT MAX(MONTH(issue\_date)) FROM bankloan.financial\_loan)-1

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**Avg DTI**

SELECT AVG(dti)\*100 AS Avg\_DTI FROM bankloan.financial\_loan



**MTD Avg DTI**

SELECT AVG(dti)\*100 AS MTD\_Avg\_DTI FROM bankloan.financial\_loan

WHERE MONTH(issue\_date) = (SELECT MAX(MONTH(issue\_date)) FROM bankloan.financial\_loan)

AND YEAR(issue\_date) = (SELECT MAX(YEAR(issue\_date)) FROM bankloan.financial\_loan);

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**PMTD Avg DTI**

SELECT AVG(dti)\*100 AS PMTD\_Avg\_DTI FROM bankloan.financial\_loan

WHERE MONTH(issue\_date)=(SELECT MAX(MONTH(issue\_date)) FROM bankloan.financial\_loan)-1

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**GOOD LOAN ISSUED:**

**Good Loan Percentage**

SELECT (COUNT(CASE WHEN loan\_status = 'Fully Paid' OR loan\_status = 'Current'

THEN id END) \* 100.0) / COUNT(id) AS Good\_Loan\_Percentage

FROM bankloan.financial\_loan

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**Good Loan Applications**

SELECT COUNT(id) AS Good\_Loan\_Applications FROM bankloan.financial\_loan

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

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**Good Loan Funded Amount**

SELECT SUM(loan\_amount) AS Good\_Loan\_Funded\_amount FROM bankloan.financial\_loan

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

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**Good Loan Amount Received**

SELECT SUM(total\_payment) AS Good\_Loan\_amount\_received FROM bankloan.financial\_loan

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

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**BAD LOAN ISSUED:**

**Bad Loan Percentage**

SELECT (COUNT(CASE WHEN loan\_status = 'Charged Off' THEN id END) \* 100.0) / COUNT(id)

AS Bad\_Loan\_Percentage

FROM bankloan.financial\_loan

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Description automatically generated**

**Bad Loan Applications**

SELECT COUNT(id) AS Bad\_Loan\_Applications FROM bankloan.financial\_loan

WHERE loan\_status = 'Charged Off'

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**Bad Loan Funded Amount**

SELECT SUM(loan\_amount) AS Bad\_Loan\_Funded\_amount FROM bankloan.financial\_loan

WHERE loan\_status = 'Charged Off'

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**Bad Loan Amount Received**

SELECT SUM(total\_payment) AS Bad\_Loan\_amount\_received FROM bankloan.financial\_loan

WHERE loan\_status = 'Charged Off'

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**LOAN STATUS:**

SELECT

loan\_status,

COUNT(id) AS LoanCount,

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

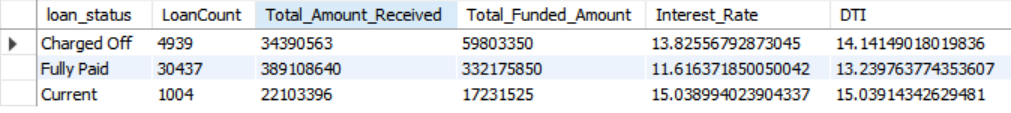
SUM(loan\_amount) AS Total\_Funded\_Amount,

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

AVG(dti \* 100) AS DTI

FROM bankloan.financial\_loan

GROUP BY loan\_status

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SELECT

loan\_status,

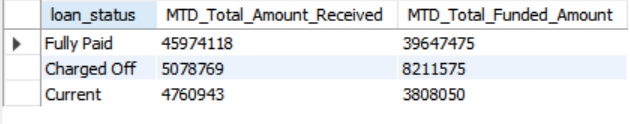
SUM(total\_payment) AS MTD\_Total\_Amount\_Received,

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

FROM bankloan.financial\_loan

WHERE MONTH(issue\_date) = 12

GROUP BY loan\_status

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1. **BANK LOAN REPORT | OVERVIEW**

**MONTH:**

SELECT

MONTH(issue\_date) AS Month\_Number,

MONTHNAME(issue\_date) AS Month\_name,

COUNT(id) AS Total\_Loan\_Applications,

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

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

FROM bankloan.financial\_loan

GROUP BY MONTH(issue\_date), MONTHNAME(issue\_date)

ORDER BY MONTH(issue\_date)

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**STATE:**

SELECT

address\_state AS State,

COUNT(id) AS Total\_Loan\_Applications,

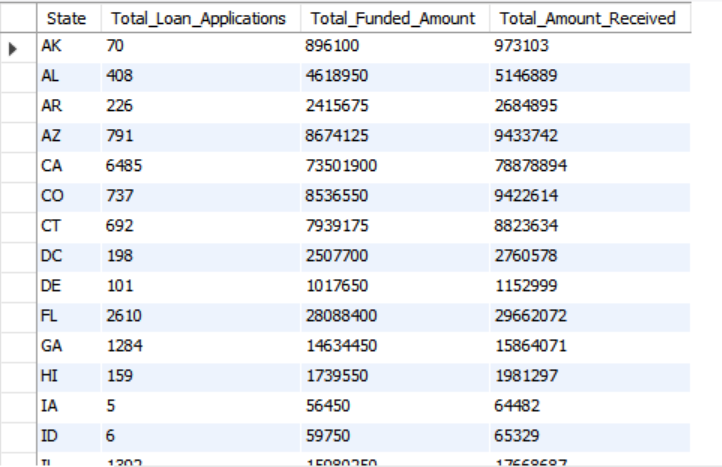
SUM(loan\_amount) AS Total\_Funded\_Amount,

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

FROM bankloan.financial\_loan

GROUP BY address\_state

ORDER BY address\_state

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**TERM:**

SELECT

term AS Term,

COUNT(id) AS Total\_Loan\_Applications,

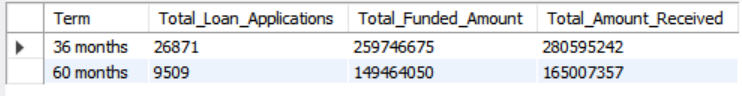
SUM(loan\_amount) AS Total\_Funded\_Amount,

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

FROM bankloan.financial\_loan

GROUP BY term

ORDER BY term



**EMPLOYEE LENGTH:**

SELECT

emp\_length AS Employee\_Length,

COUNT(id) AS Total\_Loan\_Applications,

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

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

FROM bankloan.financial\_loan

GROUP BY emp\_length

ORDER BY emp\_length

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**PURPOSE:**

SELECT

purpose AS PURPOSE,

COUNT(id) AS Total\_Loan\_Applications,

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

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

FROM bankloan.financial\_loan

GROUP BY purpose

ORDER BY purpose

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**HOME OWNERSHIP:**

SELECT

home\_ownership AS Home\_Ownership, COUNT(id) AS Total\_Loan\_Applications,

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

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

FROM bankloan.financial\_loan

GROUP BY home\_ownership

ORDER BY home\_ownership

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