**BANK LOAN REPORT QUERY DOCUMENT**

1. **BANK LOAN REPORT | SUMMARY**

**KPI’s:**

**Total Loan Applications**

SELECT COUNT(id) AS Total\_loan\_applications FROM bank\_loan\_data



**MTD Loan Applications**

SELECT COUNT(id) AS MTD\_loan\_applications FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 12 AND YEAR(issue\_date) = 2021



**PMTD Loan Applications**  
SELECT COUNT(id) AS PMTD\_loan\_applications FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 11 AND YEAR(issue\_date) = 2021



**MOM**

SELECT (m.MTD\_loan\_app - p.PMTD\_loan\_app)\* 1.0 / p.PMTD\_loan\_app \* 100 AS MOM

FROM

(SELECT COUNT(id) AS MTD\_loan\_app FROM bank\_loan\_data WHERE MONTH(issue\_date) = 12) AS m,

(SELECT COUNT(id) AS PMTD\_loan\_app FROM bank\_loan\_data WHERE MONTH(issue\_date) = 11) AS p

**Total Funded Amount**

SELECT SUM(loan\_amount) AS Total\_Funded\_amount FROM bank\_loan\_data



**MTD Total Funded Amount**

SELECT SUM(loan\_amount) AS MTD\_Total\_Funded\_amount FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 12 AND YEAR(issue\_date) = 2021



**PMTD Total Funded Amount**

SELECT SUM(loan\_amount) AS PMTD\_Total\_Funded\_amount FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 11 AND YEAR(issue\_date) = 2021



**Total Amount Received**

SELECT SUM(total\_payment) AS Total\_Amount\_received FROM bank\_loan\_data



**MTD Total Amount Received**

SELECT SUM(total\_payment) AS MTD\_Total\_Amount\_received FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 12 AND YEAR(issue\_date) = 2021



**PMTD Total Amount Received**

SELECT SUM(total\_payment) AS PMTD\_Total\_Amount\_received FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 11 AND YEAR(issue\_date) = 2021



**Average Interest Rate**

SELECT ROUND(AVG(int\_rate), 4) \* 100 AS AVG\_Interest\_rate FROM bank\_loan\_data



**MTD Average Interest**

SELECT ROUND(AVG(int\_rate), 4) \* 100 AS MTD\_AVG\_Interest\_rate FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 12 AND YEAR(issue\_date) = 2021



**PMTD Average Interest**

SELECT ROUND(AVG(int\_rate), 4) \* 100 AS PMTD\_AVG\_Interest\_rate FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 11 AND YEAR(issue\_date) = 2021



**Avg DTI**

SELECT ROUND(AVG(dti), 4) \* 100 AS Avg\_DTI FROM bank\_loan\_data



**MTD Avg DTI**

SELECT ROUND(AVG(dti), 4) \* 100 AS MTD\_Avg\_DTI FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 12 AND YEAR(issue\_date) = 2021



**PMTD Avg DTI**

SELECT ROUND(AVG(dti), 4) \* 100 AS PMTD\_Avg\_DTI FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 11 AND YEAR(issue\_date) = 2021



**GOOD LOAN ISSUED**

**Good Loan Percentage**

SELECT

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

/

COUNT(id) AS Good\_loan\_percentage

FROM bank\_loan\_data



**Good Loan Applications**

SELECT COUNT(id) AS Good\_loan\_Applications FROM bank\_loan\_data

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



**Good Loan Funded Amount**

SELECT SUM(loan\_amount) AS Good\_loan\_Funded\_amount FROM bank\_loan\_data

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



**Good Loan Amount Received**

SELECT SUM(total\_payment) AS Good\_loan\_Received\_amount FROM bank\_loan\_data

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



**BAD LOAN ISSUED**

**Bad Loan Percentage**

SELECT

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

/

COUNT(id) AS Bad\_loan\_percentage

FROM bank\_loan\_data



**Bad Loan Applications**

SELECT COUNT(id) AS Bad\_loan\_applications FROM bank\_loan\_data

WHERE loan\_status = 'Charged Off'



**Bad Loan Funded Amount**

SELECT SUM(loan\_amount) AS Bad\_loan\_Funded\_amount FROM bank\_loan\_data

WHERE loan\_status = 'Charged Off'

A screenshot of a computer

Description automatically generated

**Bad Loan Amount Received**

SELECT SUM(total\_payment) AS Bad\_loan\_Received\_amount FROM bank\_loan\_data

WHERE loan\_status = 'Charged Off'



**LOAN STATUS**

SELECT loan\_status,

COUNT(id) AS Total\_loan\_applications,

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

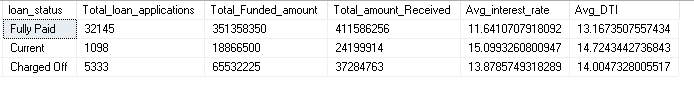
SUM(total\_payment) AS Total\_amount\_Received,

AVG(int\_rate) \* 100 AS Avg\_interest\_rate,

AVG(dti) \* 100 AS Avg\_DTI

FROM bank\_loan\_data

GROUP BY loan\_status



SELECT loan\_status,

SUM(loan\_amount) AS MTD\_total\_Funded\_amount,

SUM(total\_payment) AS MTD\_total\_amount\_Received

FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 12

GROUP BY loan\_status

A screenshot of a computer

Description automatically generated

**B. BANK LOAN REPORT | OVERVIEW**

**MONTH**

SELECT MONTH(issue\_date) AS Month\_Number,

DATENAME(MONTH, issue\_date) AS Month\_Name,

COUNT(id) AS Total\_loan\_Applications,

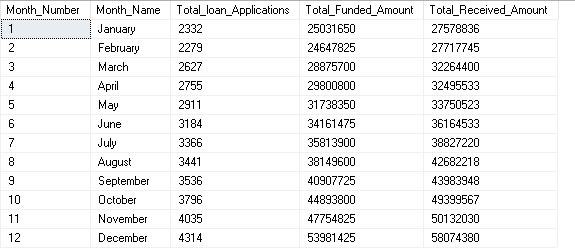
SUM(loan\_amount) AS Total\_Funded\_Amount,

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

FROM bank\_loan\_data

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

ORDER BY MONTH(issue\_date)



**TERM**

SELECT term AS Loan\_Term,

COUNT(id) AS Total\_loan\_Applications,

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

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

FROM bank\_loan\_data

GROUP BY term

ORDER BY term



**STATE**

SELECT address\_state,

COUNT(id) AS Total\_loan\_Applications,

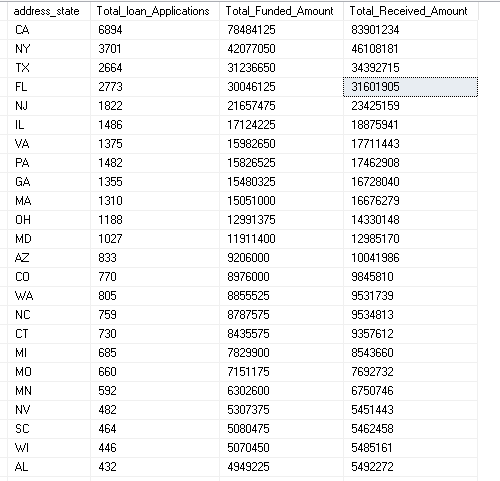
SUM(loan\_amount) AS Total\_Funded\_Amount,

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

FROM bank\_loan\_data

GROUP BY address\_state

ORDER BY SUM(loan\_amount) DESC



**EMPLOYEE LENGTH**

SELECT emp\_length AS Emp\_length,

COUNT(id) AS Total\_loan\_Applications,

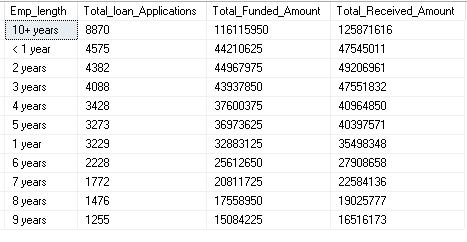
SUM(loan\_amount) AS Total\_Funded\_Amount,

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

FROM bank\_loan\_data

GROUP BY emp\_length

ORDER BY COUNT(id) DESC



**PURPOSE**

SELECT purpose,

COUNT(id) AS Total\_loan\_Applications,

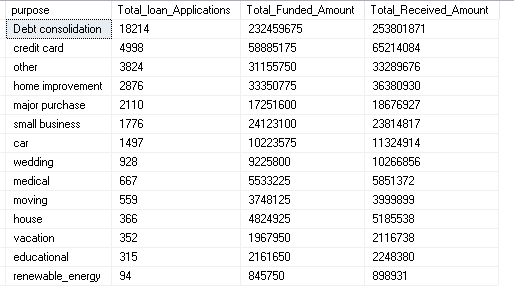
SUM(loan\_amount) AS Total\_Funded\_Amount,

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

FROM bank\_loan\_data

GROUP BY purpose

ORDER BY COUNT(id) DESC



**HOME OWNERSHIP**

SELECT home\_ownership,

COUNT(id) AS Total\_loan\_Applications,

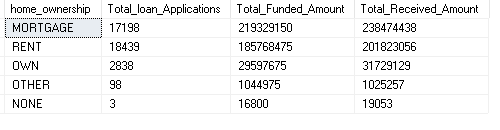
SUM(loan\_amount) AS Total\_Funded\_Amount,

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

FROM bank\_loan\_data

GROUP BY home\_ownership

ORDER BY SUM(loan\_amount) DESC



*Note: We have applied multiple Filters on all the dashboards.*

*See the results when we hit the Grade A in the filters for dashboards.*

SELECT purpose,

COUNT(id) AS Total\_loan\_Applications,

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

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

FROM bank\_loan\_data

WHERE grade = 'A' AND address\_state = 'TX'

GROUP BY purpose

ORDER BY SUM(loan\_amount) DESC

