



# **CREDIT CARD WEEKLY STATUS REPORT**

**Power BI Project**

# **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.

# **WORKFLOW**

- Prepare csv file
- Create tables in SQL
- Import csv file into SQL

# DAX QUERIES

```
AgeGroup = SWITCH(  
TRUE(),  
'customer'[customer_age] < 30, "20-30",  
'customer'[customer_age] >= 30 &&  
'customer'[customer_age] < 40, "30-40",  
'customer'[customer_age] >= 40 &&  
'customer'[customer_age] < 50, "40-50",  
'customer'[customer_age] >= 50 &&  
'customer'[customer_age] < 60, "50-60",  
'customer'[customer_age] >= 60, "60+",  
"unknown" )
```



# DAX QUERIES

```
IncomeGroup = SWITCH(  
TRUE(),  
'customer'[income] < 35000, "Low",  
'customer'[income] >= 35000 &&  
'customer'[income] < 70000, "Medium",  
'customer'[income] >= 70000, "High",  
"unknown" )
```



# DAX QUERIES

Week\_Num2 = WEEKNUM('credit\_card'[week\_start\_date])

Revenue = 'credit\_card'[annual\_fees] + 'credit\_card'[total\_trans\_amt] +  
'credit\_card'[interest\_earned]

Current\_Week\_Revenue = CALCULATE(  
SUM('credit\_card'[Revenue]),  
FILTER( ALL('credit\_card'),  
'credit\_card'[Week\_Num2] = MAX('credit\_card'[Week\_Num2])))



# DAX QUERIES

```
Previous_Week_Revenue = CALCULATE(  
SUM('credit_card'[Revenue]),  
FILTER( ALL('credit_card'),  
'credit_card'[Week_Num2] = MAX('credit_card'[Week_Num2])-1))
```



# PROJECT INSIGHTS

## WoW change:

- Revenue decreased by 13% in week 52,
- Total Transaction Amt & volume decreased by 13% & 10% in week 52,
- Customer satisfaction score decreased by 16%



# **PROJECT INSIGHTS**

## **OVERVIEW:**

- Overall revenue is 45M
- Total interest is 8M
- Total transaction amount is 55M
- Male customers are contributing more in revenue 30M, female 25M
- Blue & Silver credit card are contributing to 93% of overall transaction amount
- TX, NY & CA is contributing to 68% of overall revenue
- Overall Activation rate is 57.5%
- Overall Delinquent rate is 6.06%

A minimalist desk setup with a white mug, a glass jar of pens, and a keyboard, overlaid with a large 'THANK YOU' text.

**THANK YOU**