

# Credit Card Financial Dashboard

Power BI

# Project Objective

Develop a comprehensive and user-friendly credit card financial dashboard that centralizes all transaction data, enhances financial visibility, and supports users in managing their budgets, detecting fraud, and planning their financial future. The dashboard will provide real-time insights, customizable features, and robust security measures to ensure data privacy and user trust.

# Dax Queries

## 1. AgeGroup

```
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"  
)
```

# Dax Queries

## 2. IncomeGroup

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

## 3. week\_num2

```
week_num2 = WEEKNUM('public cc_detail'[week_start_date])
```

## 4. Revenue

```
Revenue = 'public cc_detail'[annual_fees] + 'public cc_detail'[total_trans_amt] +  
    'public cc_detail'[interest_earned]
```

# Dax Queries

## 5. Current week Revenue

```
Current_week_Revenue = CALCULATE( SUM('public cc_detail'[Revenue]),  
    FILTER(  
        ALL('public cc_detail'),  
        'public cc_detail'[week_num2] = MAX('public cc_detail'[week_num2])))
```

## 6. Previous week Revenue

```
Previous_week_Revenue = CALCULATE( SUM('public cc_detail'[Revenue]),  
    FILTER(  
        ALL('public cc_detail'),  
        'public cc_detail'[week_num2] = MAX('public cc_detail'[week_num2])-1))
```

# Credit Card Transaction Report

Revenue

55M

Total Interest

7.8M

Trans Vol

656K

Trans Amount

45M

Card_Category	Sum of Revenue	Sum of Interest_Earned	Sum of Annual_Fees
Platinum	1135608	161629	20665
Gold	2454072	373784	56210
Silver	5586332	812081	187505
Blue	46139398	6495888	2685635
Total	55315410	7843382	2950015

Q4

Q3

Q2

Q1

Week\_Start\_Date

All

F

M

Medium

Low

High

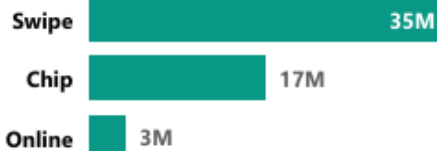
Silver

Blue

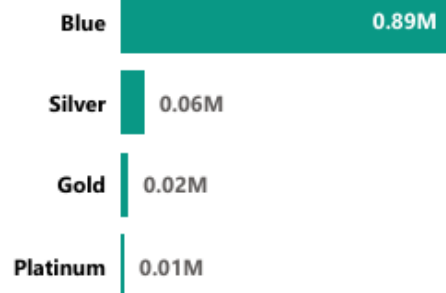
Gold

Platinum

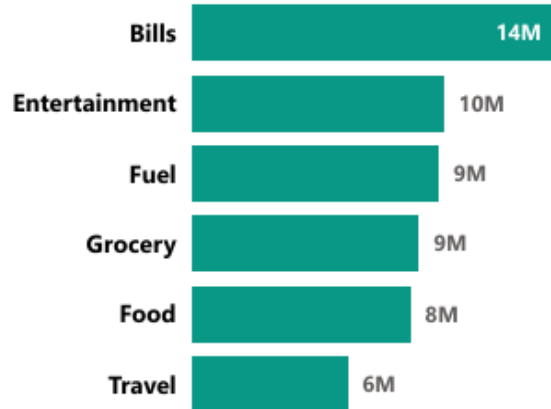
## Revenue by Use Chip



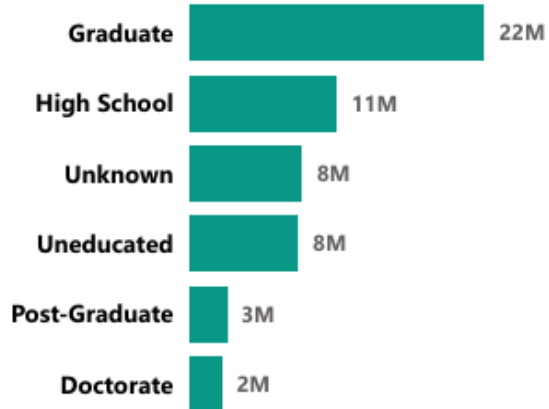
## Revenue by Card Category



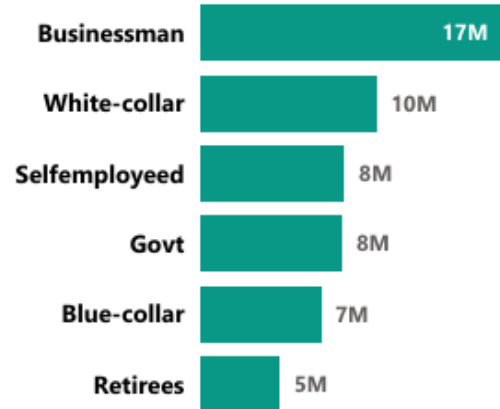
## Revenue by Expenditure Type



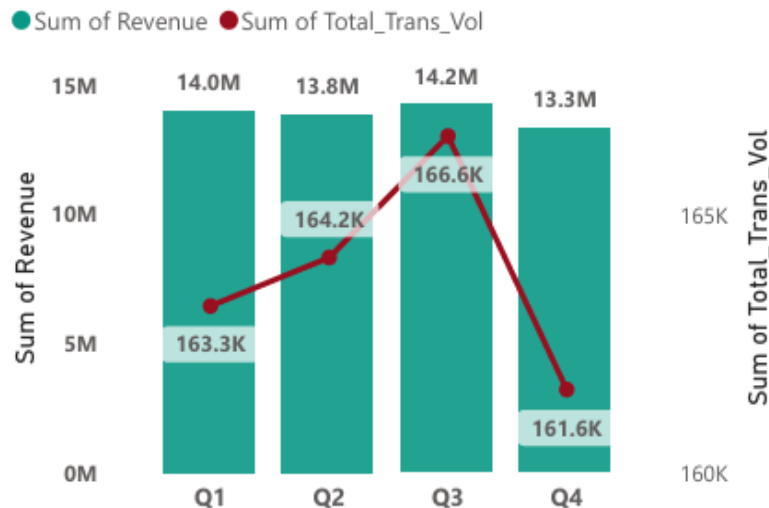
## Revenue by Education



## Revenue by Customer Profession



## QTR Revenue and Trans Volume



# Credit Card Customer Report

Q4

Q3

Q2

Q1

Week\_Start\_Date

All

Revenue

55M

Total Interest

7.8M

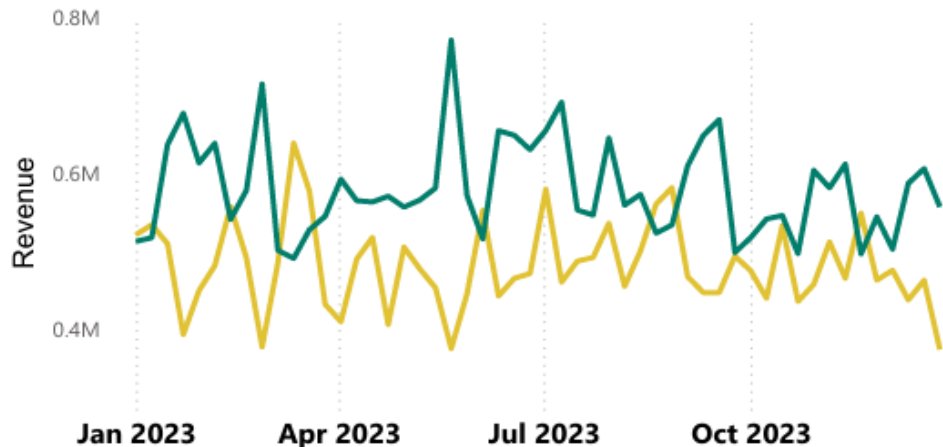
Income

576M

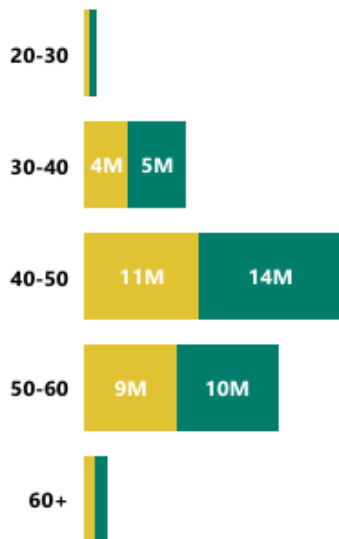
CSS

3.19

Revenue by Week



Age Group



M

30M

F

25M

Swipe

Online

Chip

Silver

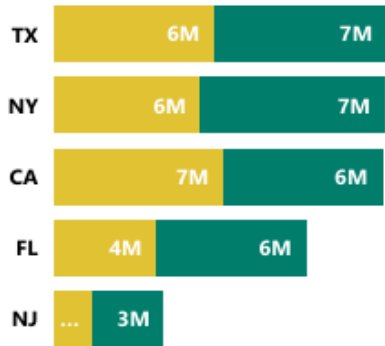
Blue

Gold

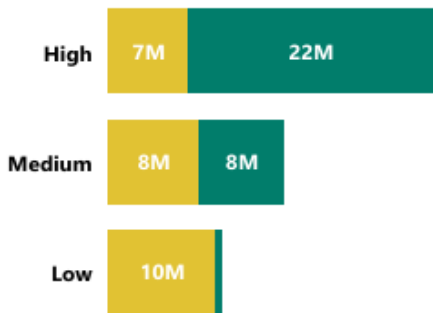
Platinum

Customer_Job	Sum of Revenue	Sum of Interest_Earned	Sum of Income
Businessman	17387832	2539390	186959919
White-collar	10114656	1441074	103930055
Govt	8111701	1160016	88773989
Selfemployeed	8261758	1119742	75313288
Blue-collar	6904279	952801	72262158
Retirees	4535184	630359	48675030
Total	55315410	7843382	575914439

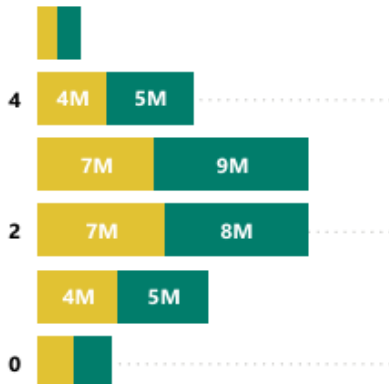
Top 5 States



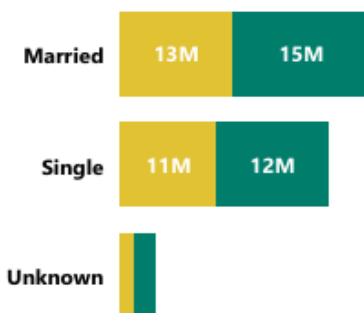
Salary Group



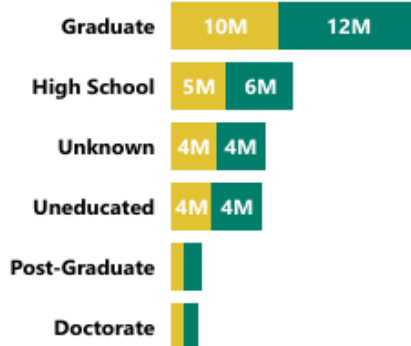
Dependent Count



Marital Status



Education Level



# Key Performance Indicator

- Total revenue is 55M.
- Total Interest earned 7.8M.
- Total transactions volume 656k.
- Total transactions amount 45M.
- Total Customer income 575M.
- Customer satisfaction score is 3.19 which is range 1-5.



# Insights

- High Revenue Sources: Major revenue is generated from Blue card users and swiping transactions.
- Top Spending Categories: Bills and entertainment are the leading expenditure types.
- Demographic Influence: Higher revenue is seen from graduates and businessmen, indicating a more affluent customer base.
- Regional Performance: States like TX, NY and CA are significant contributors to the revenue.
- Spending Trends: The highest revenue comes from the 40-50 age group and those with higher education levels.

**Thank you**