CREDIT CARD

WEEKLY STATUS REPORT



Content in this tutorial

- 1. Project objective
- 2. Data from SQL
- 3. Data processing & DAX
- 4. Dashboard & insights
- 5. Export & share project



project Objective

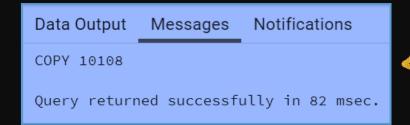
To develop a comprehensive credit card weekly dashboard that provides real-time insights into key performance metrics and trends, enabling stakeholders to monitor and analyze credit card operations effectively.



Import data to SQL database

- 1. Prepare csv file
- 2. Create tables in SQL
- 3. import csv file into SQL





DAX Queries

```
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"
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"
```



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DAX Queries

```
week_num2 = WEEKNUM('public cc detail'[week start date])
Revenue = 'public cc_detail'[annual_fees] + 'public cc_detail'[total_trans_amt] + 'public cc_detail'[interest_earned]
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])))
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))
```



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Project Insights- Week 53 (31st Dec)

WoW 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%



Note: You can add more insights

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Add to resume

Credit card financial dashboard using Power BI:

- Developed an interactive dashboard using transaction and customer data from a SQL database, to provide real-time insights.
- Streamlined data processing & analysis to monitor key performance metrics and trends.
- Shared actionable insights with stakeholders based on dashboard findings to support decision-making processes.





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