



Welcome to the Financial Analytics Project

The Project Aims to Provide a Complete Financial Analytics Report / Dashboard on the Loan Dataset.

About Company: “**Growth**” is a Financial Company that deals with financial data and provides Loans to various categories.

Customers: 38k +

Total Funded Amount: \$ 435 Million

Total Received Amount: \$ 473 Million

I used 30k + records of the dataset for this complete project.

AIM of the Project:

Comapny Facing Problem: The company is facing issues in understanding the company-funded loans, revenue, interest rates, and the total revenue they are generating from loans

NOTE: In this Financial project, I used the temporary company Name and Logo created for Project and Learning purposes.

MY TASK:

- Understand the Financial Data and know some financial concepts to deal with the dataset **Completed ▾**
- Performed Excel / Google Sheets for Data Cleaning **Completed ▾**
- Power BI Dashboard Building
 - Overview
 - Summary
 - Details
 - Forecast Revenue **Completed ▾**
- Prepare Stakeholder Presentation **Completed ▾**
- Recommendations **Completed ▾**
- Additionally:
 - Created an AI Agent for financial Reporting using some other financial dataset, and created PPT slides **Completed ▾**
- Overall Presentations **Completed ▾**
- I Used AI
 - ChatGPT for Learning and Efficiency DAX Calculations
 - Perplexity AI for research
 - Gamma For Presentations **Completed ▾**

Some Basic Full Forms of Financial Terms

DTI: (Debt-to-Income Ratio)

In loan applications, DTI stands for Debt-to-Income Ratio.

It's a financial metric that measures the percentage of your gross monthly income that goes towards repaying all of your debts.

Resources I used to Learn Financial Topics: (Motivation)

[JP Morgan Chase](#)

JP Morgan Financial Highlights PDF

Ramesh k

Product & Analytics

 [LinkedIn](#)

 [Portfolio](#)