CREDIT CARD

WEEKLY STATUS REPORT

Content in this tutorial video

1. Project objective
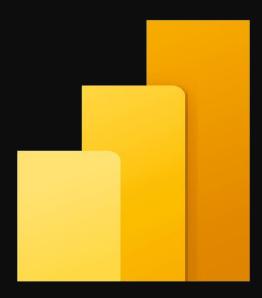
2. Data processing & DAX

3. Dashboard & insights

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.

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"
    )


IncomeGroup = SWITCH(
    TRUE(),
    customer[income] < 35000, "Low",
    customer[income] >= 35000 && 'public cust_detail'[income] <70000, "Med",
    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_Reveneue = CALCULATE(
   SUM(' credit_card '[Revenue]),
   FILTER(
     ALL(' credit_card '),
     ' credit_card '[week_num2] = MAX(' credit_card '[week_num2])))

Previous_week_Reveneue = CALCULATE(
   SUM(' credit_card '[Revenue]), FILTER(
     ALL(' credit_card '),
     ' credit_card '[week_num2] = MAX(' credit_card '[week_num2])-1))

Project Insights

Overview :

- 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%