

CREDIT CARD

WEEKLY STATUS REPORT

Project Objective

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.

Download Data

GitHub:

https://github.com/RushikeshRathod9/Credit_Card_Financial_Dashbaord

Import data to SQL database

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

DAX Queries

```
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, "High", "unknown" )
```

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

```
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))
```

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%

Add to resume

Credit Card Financial Dashboard using Power BI, PostgreSQL, and Excel:

- Designed and developed an interactive dashboard using transaction and customer data from a SQL database to deliver real-time insights.
- Optimized data processing and analysis workflows to track key performance indicators and emerging trends.
- Shared and provided actionable insights based on dashboard findings to support data-driven decisions.