# CREDIT CARD WEEKLY STATUS REPORT



- 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.





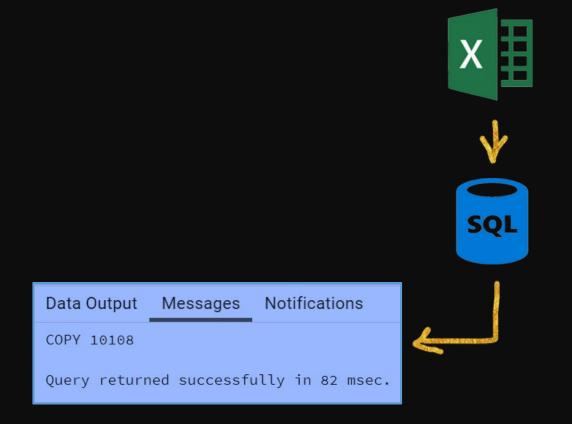
#### GitHub:

https://github.com/SURESHBEEKHANI/powerbiprojects/tree/main/Credit\_Card\_Financial\_Dashboard/Data



# Import data to SQL database

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



**NOTE:** Find all SQL queries & project data- https://shorturl.at/3ACC2

### **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"
)
```



## **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))
```

# 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