



CREDIT CARD

WEEKLY
STATUS REPORT

CONTENT :

- Project objective
- Data from SQL
- Data processing & DAX
- Snapshots
- Dashboard & insights

PROJECT OBJECTIVE :

To build a complete weekly dashboard that gives leaders and teams immediate, real-time, clear data on credit card performance.

The dashboard's purpose is to allow stakeholders to easily track trends and analyze operations to ensure effective management.

IMPORT DATA TO SQL DATABASE :

- ✓ Prepare csv file
- ✓ Create tables in SQL
- ✓ 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"
)
```

DAX QUERIES :

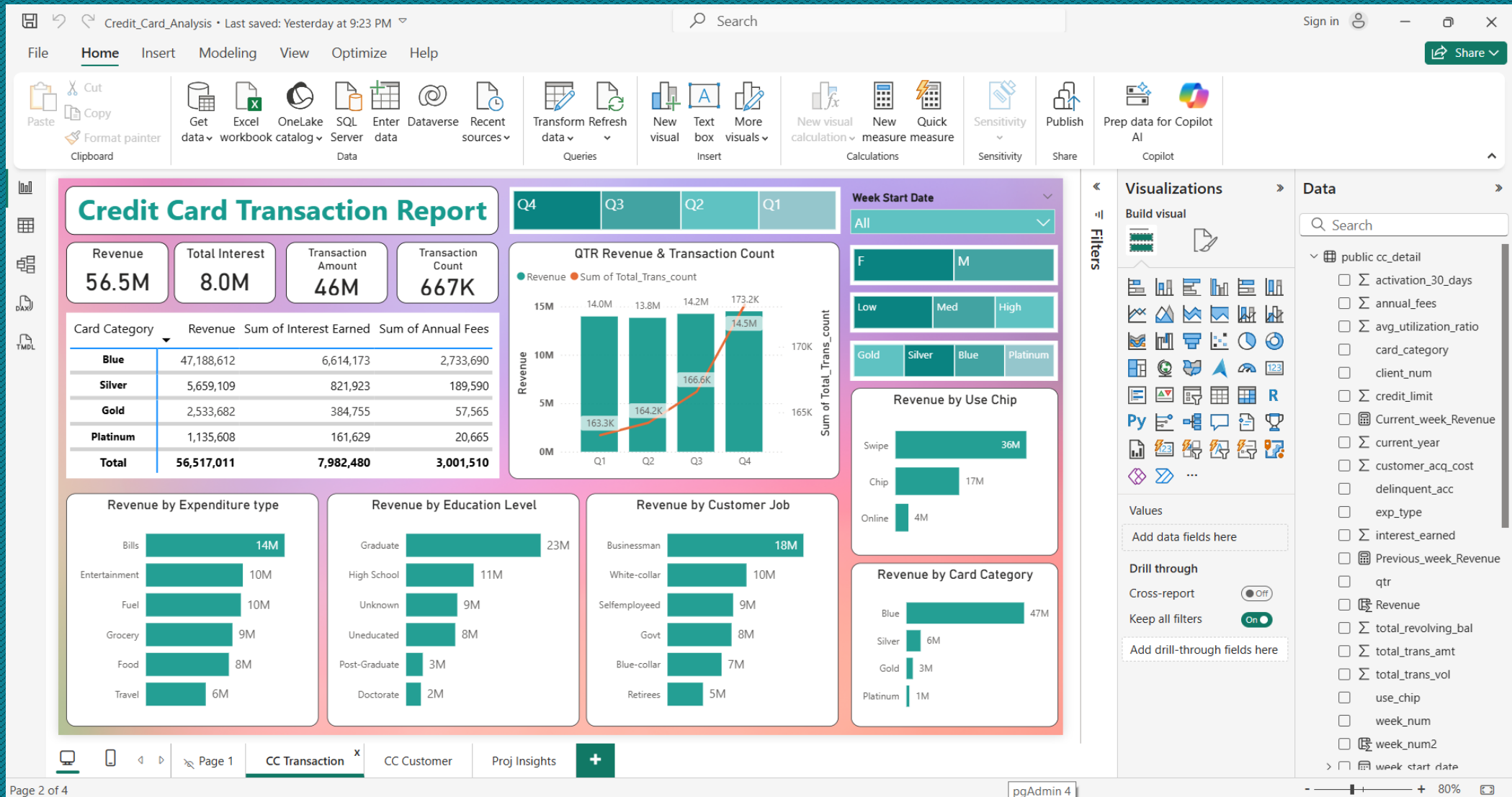
```
week_num2 = WEEKNUM('public cc_detail'[week_start_date])
```

```
Revenue = 'public cc_detail'[annual_fees] + 'public cc_detail'[total_trans_amt] + 'public cc_detail'[interest_earned]
```

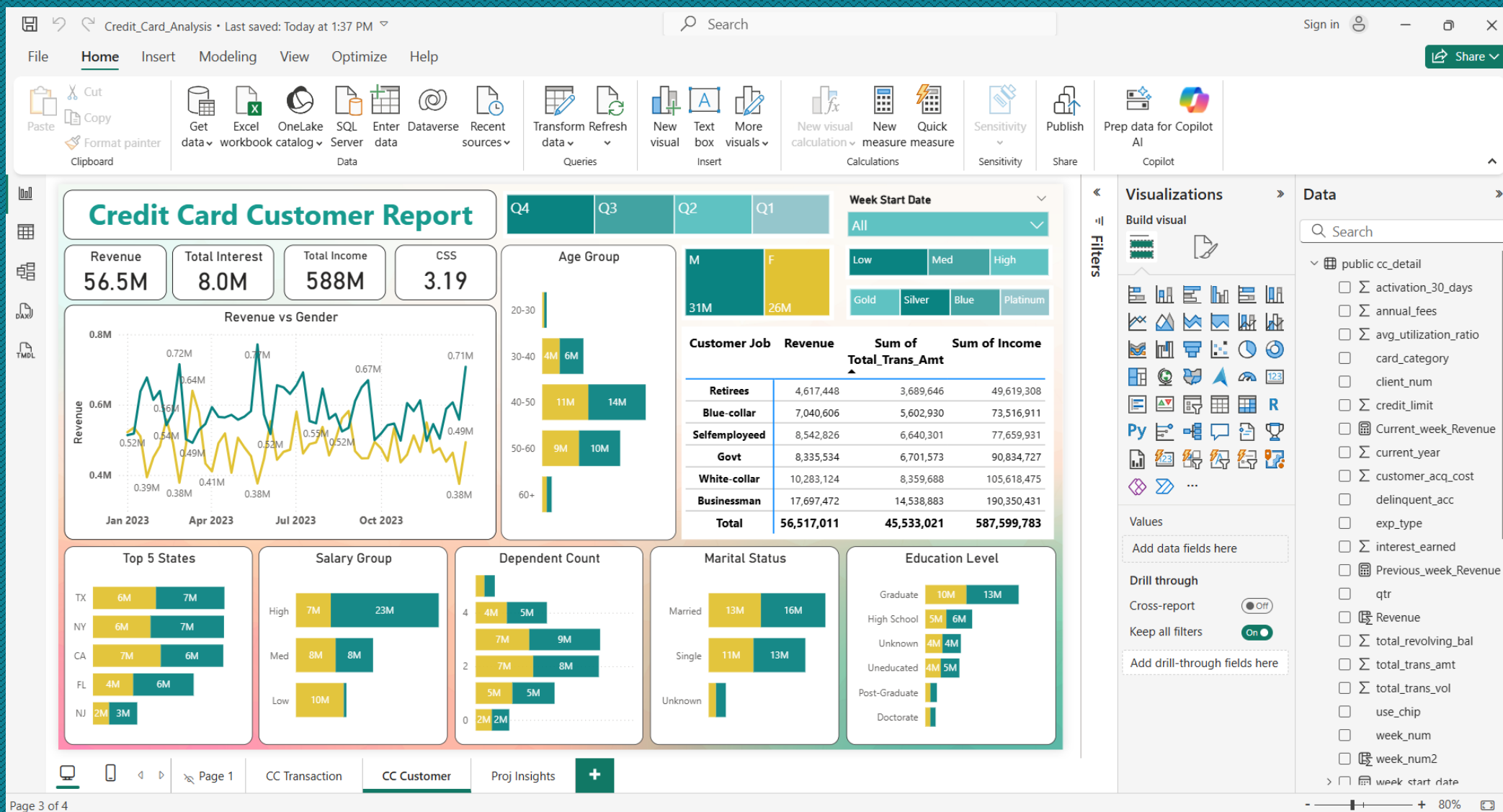
```
Current_week_Revenue = CALCULATE(  
    SUM('public cc_detail'[Revenue]),  
    FILTER(  
        ALL('public cc_detail'),  
        'public cc_detail'[week_num2] = MAX('public cc_detail'[week_num2])  
    )  
)
```

```
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  
    )  
)
```

SNAPSHOTS:



SNAPSHOTS:





FINAL PROJECT INSIGHTS: WEEK 53 (DECEMBER 31st)

I. Week Over Week (WoW) Change:

This shows what changed from the previous week.

- Revenue grew by 28.8%. This is a huge jump, meaning the last week of the year was very strong for sales.
- Total Transaction Amount increased 0.35% and Count increased only 0.03%. This means customers were not swiping more often, but they were spending *much more* each time they used the card.
- Customer count increased by 0.28%. The number of cardholders is still growing steadily.



FINAL PROJECT INSIGHTS: WEEK 53 (DECEMBER 31st)

II. Overview Year-to-Date (YTD):

This shows the overall performance of the card program for the whole year.

- Total revenue is \$56.5M. This is the total money the card program made.
- Total interest is \$8M. This is the income made just from revolving credit (customers paying interest).
- Total transaction amount is \$45.5M. This is the total value of all purchases made on the cards.
- Male customers contribute more in revenue (\$31M), compared to female customers (\$26M). We need to find a way to increase spending from the female segment.
- Blue & Silver credit cards contribute to 93% of all transactions. Almost all activity comes from these two card types.
- TX, NY, & CA are contributing 68% of the total business. The card is very popular in these three states.
- Overall Activation rate is 57.5% . Over half of new cards are being used, but we need to activate the remaining cards to bring in more revenue.
- Overall Delinquent rate is 6.06% . A very low number of customers are late on payments, which means the portfolio is financially healthy.



Thank You