

KOTAK CREDIT CARD

WEEKLY
STATUS REPORT



Content in this tutorial video

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.



Download Data

GitHub:

https://github.com/Sameer0shah/Kotak_Credit_card_financial__Report_Dashboard

or

Google Drive:

https://drive.google.com/drive/folders/1_8xD7VzgRzhRRKSPnSh0e_xmeURqGddP



Import data to SQL database

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



Data Output	Messages	Notifications
COPY 10108		
Query returned successfully in 82 msec.		

NOTE: Find all SQL queries & project data- [github.com/rishabhnmishra/Credit Card Financial Dashboard](https://github.com/rishabhnmishra/Credit_Card_Financial_Dashboard)

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))
```



Project Insights- Week 53 (31st Dec)

WoW change:

- Revenue increased by 14%,
- Total Transaction Amt by 45M

Overview YTD:

- Overall revenue is 55M
- Total interest is 8M
- Total transaction amount is 45M
- Male customers are contributing more in revenue 30M, female 25M
- 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:

- Developed an interactive dashboard using transaction and customer data from a SQL database, to provide real-time insights.
- Streamlined data processing & analysis to monitor key performance metrics and trends.
- Shared actionable insights with stakeholders based on dashboard findings to support decision-making processes.



Credit Card Transaction Report

Week_Start_Date

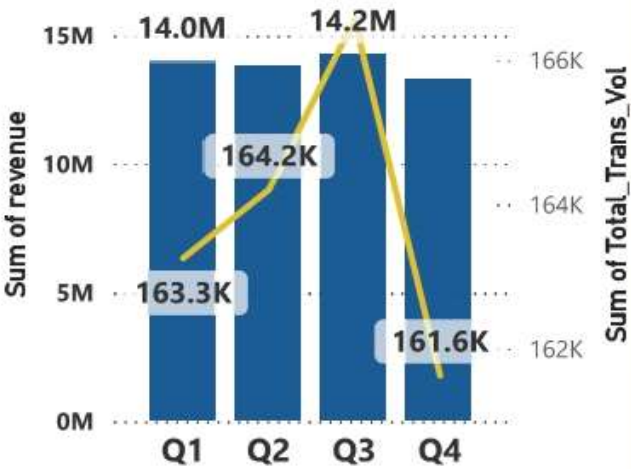
All

F

M

QTR revenue and trans count

Sum of revenue Sum of Total_Trans_...



Q4

Q3

Q2

Q1

Revenue

55M

Total amount

45M

Total intrest

8M

Total Transection

656K

low

med

high

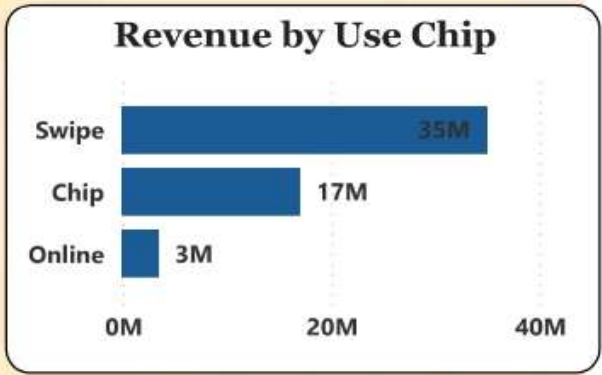
Silver

Blue

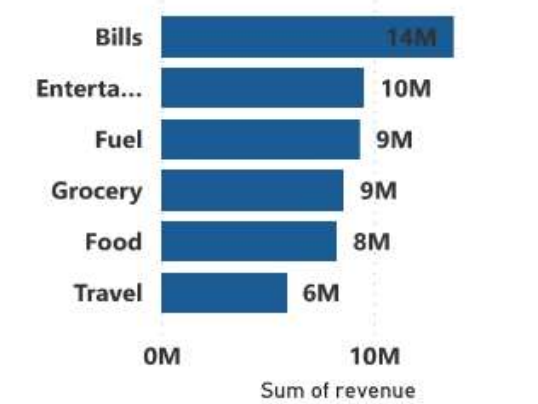
Gold

Platin...

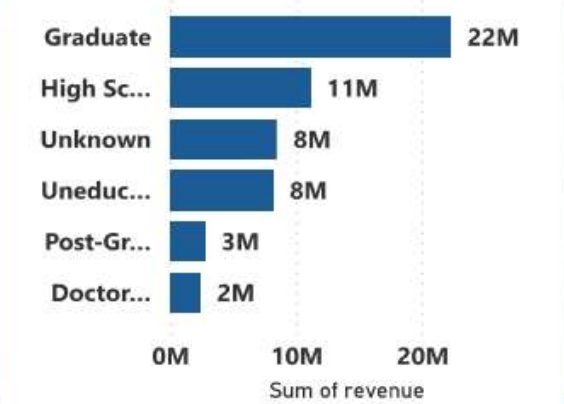
Card_Category	Sum of revenue	Sum of Total_Trans_Amt	Sum of Interest_Earned
Silver	5586332	4586746	812081
Platinum	1135608	953314	161629
Gold	2454072	2024078	373784
Blue	46139398	36957875	6495888
Total	55315410	44522013	7843382



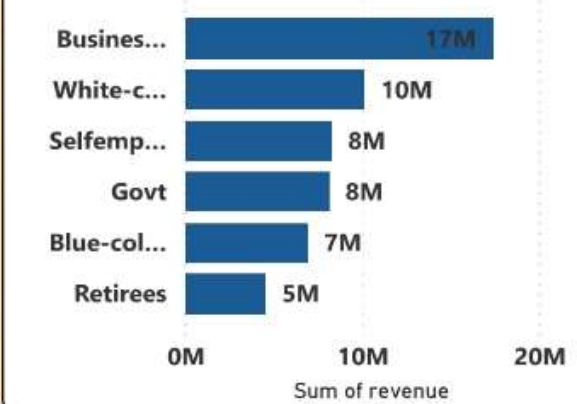
Revenue by Expeniture type



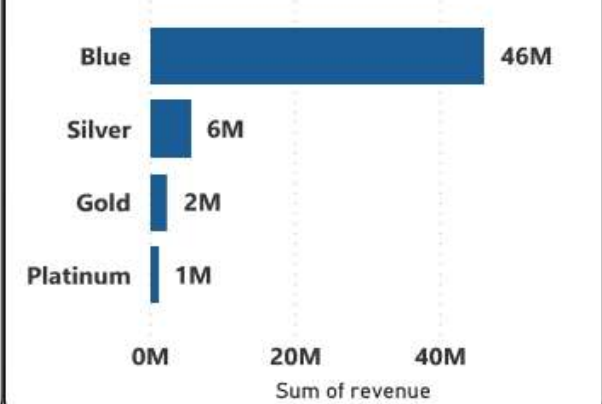
Revenue by Education_Level



Revenue by Customer_Job



Revenue by Card_Category



Credit Card Customer Report

Q4

Q3

Q2

Q1

Revenue

55M

Total Intrest

8M

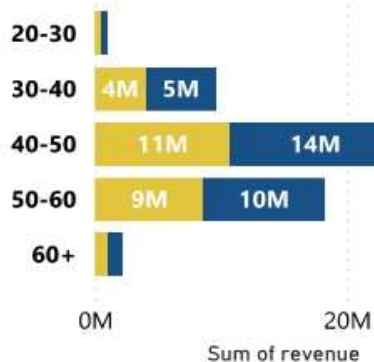
Income

576M

CSS

3.19

Revenue by Agegroup



Week_Start_Date

All

M

30M

F

25M

Swipe

Online

Chip

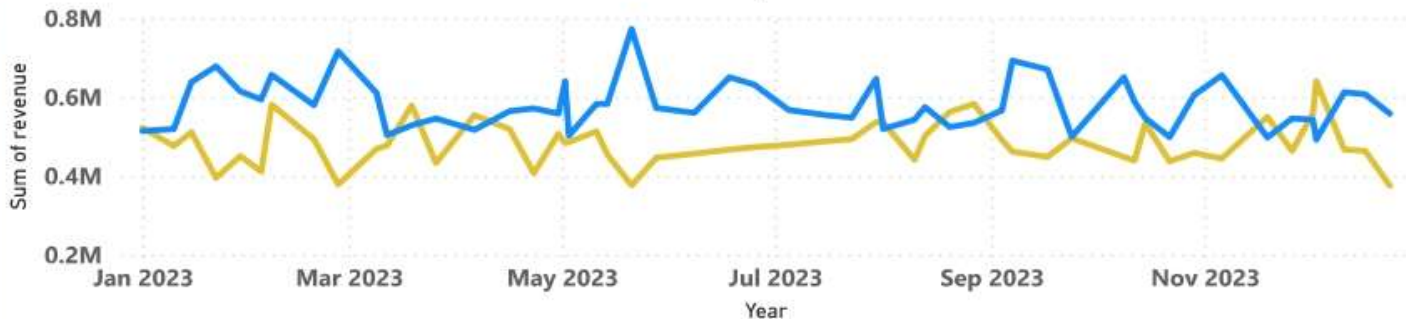
Silver

Blue

Gold

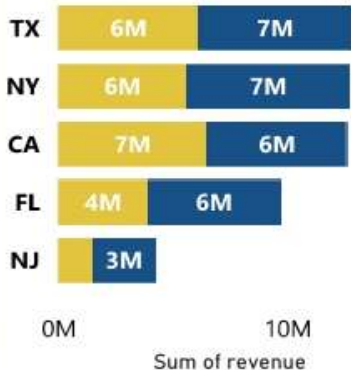
Platin...

Revenue by Weel

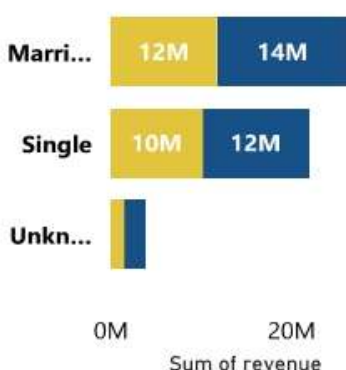


Customer_Job	Sum of revenue	Sum of Income	Sum of Interest_Earned
White-collar	10114656	103930055	1441074
Selfemployed	8261758	75313288	1119742
Retirees	4535184	48675030	630359
Govt	8111701	88773989	1160016
Businessman	17387832	186959919	2539390
Blue-collar	6904279	72262158	952801
Total	55315410	575914439	7843382

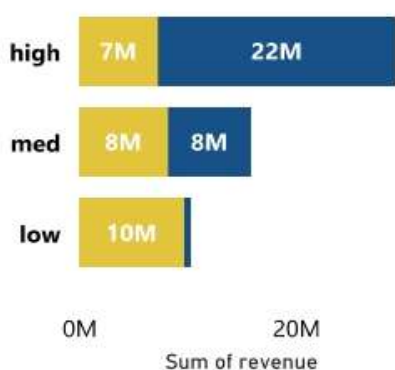
top 5 sates



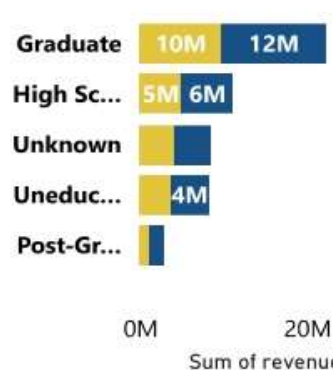
Revenue by Maretil



Revenue by Income



Revenue by Education



Revanue by Department

