**BANK LOAN REPORT QUERY DOCUMENT**

1. **BANK LOAN REPORT | SUMMARY**

**KPI’s:**

1. **Total Loan Applications (KPI 1)**

select COUNT(id) as Total\_Loan\_Applications from financial\_loan



**Month to Date Loan Application**

select COUNT(id) as Month\_to\_Date\_Total\_Loan\_Applications from financial\_loan

where month(issue\_date) = 12 and year(issue\_date) = 2021



**Previous Month to Date Loan Applications**

select COUNT(id) as Previous\_Month\_to\_Date\_Total\_Loan\_Applications from financial\_loan

where month(issue\_date) = 11 and year(issue\_date) = 2021



1. **Total Funded Amount (KPI 2)**

Select sum(loan\_amount) as Total\_Funded\_Amount from financial\_loan



**Month to Date Total Funded Amount**

Select sum(loan\_amount) as Month\_To\_Date\_Total\_Funded\_Amount from financial\_loan

where month(issue\_date) = 12 and year(issue\_date) = 2021



**Previous Month to Date Total Funded Amount**

Select sum(loan\_amount) as Previous\_Month\_To\_Date\_Total\_Funded\_Amount from financial\_loan

where month(issue\_date) = 11 and year(issue\_date) = 2021



1. **Total Amount Collected (KPI 3)**

Select sum(total\_payment) as Total\_Amount\_Collected from financial\_loan

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**Month to Date Total Amount Collected**

Select sum(total\_payment) as Month\_to\_date\_Total\_Amount\_Collected from financial\_loan

where month(issue\_date) = 12 and year(issue\_date) = 2021



**Previous Month to Date Total Amount Collected**

Select sum(total\_payment) as Previous\_Month\_to\_date\_Total\_Amount\_Collected from financial\_loan where month(issue\_date) = 11 and year(issue\_date) = 2021



1. **Average Interest Rate (KPI 4)**

select AVG(int\_rate) \* 100 as Avg\_Interest\_Rate from financial\_loan

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**Month to Date Avarage Interest Rate**

select AVG(int\_rate) \* 100 as MTD\_Avg\_Interest\_Rate from financial\_loan

where month(issue\_date) = 12 and year(issue\_date) = 2021



**Previous Month to Date Avarage Interest Rate**

select AVG(int\_rate) \* 100 as PMTD\_Avg\_Interest\_Rate from financial\_loan where month(issue\_date) = 11 and year(issue\_date) = 2021



1. **Avg DIT (KPI 5)**

select AVG(dti) \* 100 as Avg\_DTI from financial\_loan

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**Month to Date Avg DTI**

select AVG(dti) \* 100 as MTD\_Avg\_DTI from financial\_loan where MONTH(issue\_date) = 12 and YEAR(issue\_date) = 2021



**Previous Month to Date Avg DTI**

select AVG(dti) \* 100 as PMTD\_Avg\_DTI from financial\_loan

where MONTH(issue\_date) = 11 and YEAR(issue\_date) = 2021



**GOOD LOAN ISSUED**

**Good Loan Percentage**

select(count(case when loan\_status = 'Fully Paid' or loan\_status = 'Current' then id end) \* 100) / count(id) as Good\_Loan\_Percentage from financial\_loan



**Good Loan Applications**

select count(id) as Good\_Loan\_Applications from financial\_loan

where loan\_status = 'Fully Paid' or loan\_status = 'Current'

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**Good Loan Funded Amount**

select sum(loan\_amount) as Good\_Loan\_Funded\_Amount from financial\_loan

where loan\_status = 'Fully Paid' or loan\_status = 'Current'

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**Good Loan Total Received Amount**

select sum(total\_payment) as Good\_Loan\_Received\_Amount from financial\_loan

where loan\_status = 'Fully Paid' or loan\_status = 'Current'

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**BAD LOAN ISSUED**

**Bad Loan Application Percentage**

Select (count(case when loan\_status = 'Charged Off' then id end) \* 100)/ count(id) as Bad\_Loan\_Percentage from financial\_loan



**Bad Loan Applications**

select COUNT(id) as Bad\_loan\_Applications from financial\_loan

where loan\_status = 'Charged Off'

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**Bad Loan Funded Amount**

select SUM(loan\_amount) as Bad\_loan\_Funded\_Amount from financial\_loan

where loan\_status = 'Charged Off'

****

**Bad Loan Received Amount**

select SUM(total\_payment) as Bad\_loan\_Received\_Amount from financial\_loan

where loan\_status = 'Charged Off'

****

**LOAN STATUS**

Select

loan\_status,

COUNT(id) as Total\_Loan\_Applications,

SUM(total\_payment) as Total\_Amount\_Received,

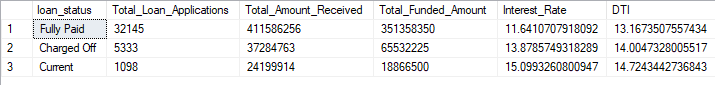
SUM(loan\_amount) as Total\_Funded\_Amount,

AVG(int\_rate \* 100) as Interest\_Rate,

AVG(dti \* 100) as DTI

from financial\_loan

group by loan\_status

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**Current Month**

select

loan\_status,

SUM(total\_payment) as MTD\_Total\_Loan\_Amount\_Received,

SUM(loan\_amount) as MTD\_Total\_Funded\_Amount

from financial\_loan

where MONTH(issue\_date) = 12

group by loan\_status

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1. **BANK LOAN REPORT | OVERVIEW**

**MONTH**

select

MONTH(issue\_date) as Month\_Number,

DATENAME(MONTH, issue\_date) as Month\_Name,

COUNT(id) as Total\_Loan\_Applications,

SUM(loan\_amount) as Total\_Funded\_Amount,

SUM(total\_payment) as Total\_Received\_Amount

from financial\_loan

group by Month(issue\_date), DATENAME(MONTH, issue\_date)

order by Month(issue\_date)

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**STATE**

select

address\_state,

COUNT(id) as Total\_Loan\_Applications,

SUM(loan\_amount) as Total\_Funded\_Amount,

SUM(total\_payment) as Total\_Received\_Amount

from financial\_loan

group by address\_state

order by address\_state

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**TERM**

select

term,

COUNT(id) as Total\_Loan\_Applications,

SUM(loan\_amount) as Total\_Funded\_Amount,

SUM(total\_payment) as Total\_Received\_Amount

from financial\_loan

group by term

order by term

****

**EMPLOYEE LENGTH**

select

emp\_length,

COUNT(id) as Total\_Loan\_Applications,

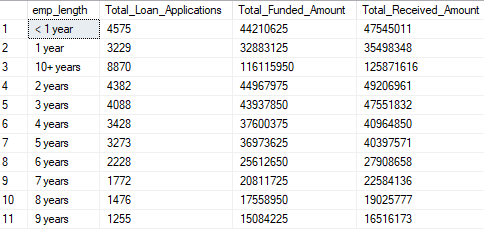
SUM(loan\_amount) as Total\_Funded\_Amount,

SUM(total\_payment) as Total\_Received\_Amount

from financial\_loan

group by emp\_length

order by emp\_length

****

**PURPOSE**

select

purpose as Purpose,

COUNT(id) as Total\_Loan\_Applications,

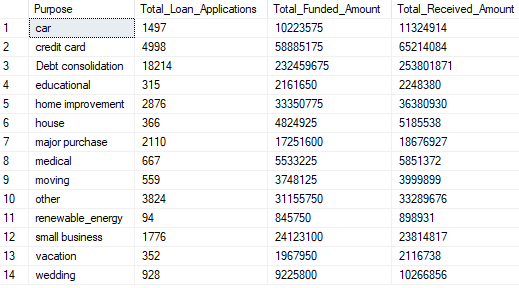
SUM(loan\_amount) as Total\_Funded\_Amount,

SUM(total\_payment) as Total\_Received\_Amount

from financial\_loan

group by purpose

order by purpose

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**HOME OWNERSHIP**

select

home\_ownership as HOME\_OWNERSHIP,

COUNT(id) as Total\_Loan\_Applications,

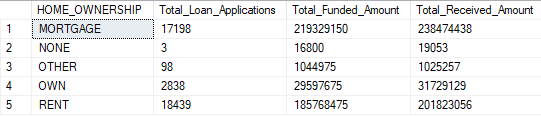
SUM(loan\_amount) as Total\_Funded\_Amount,

SUM(total\_payment) as Total\_Received\_Amount

from financial\_loan

group by home\_ownership

order by home\_ownership

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