



Credit Card Weekly Report

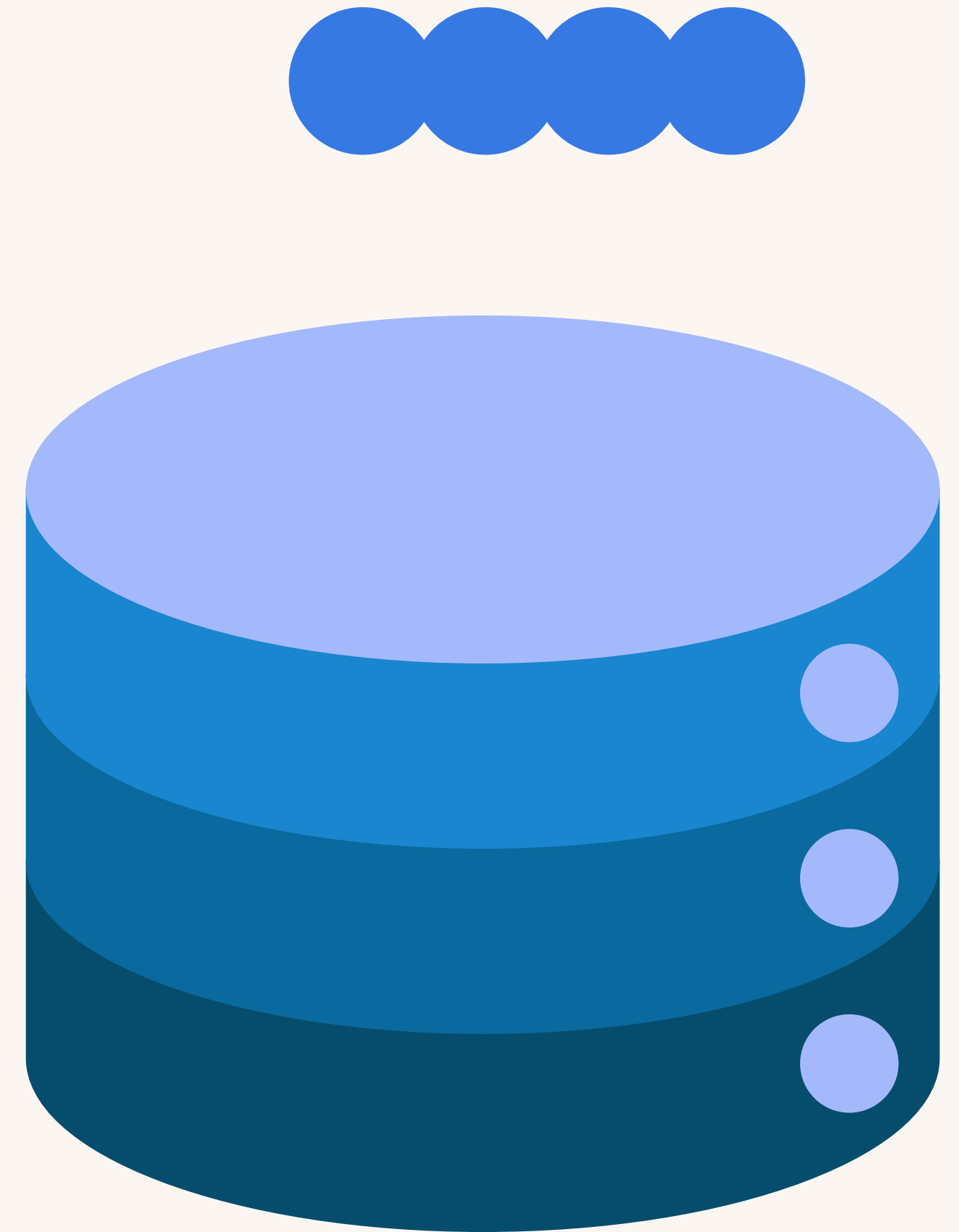
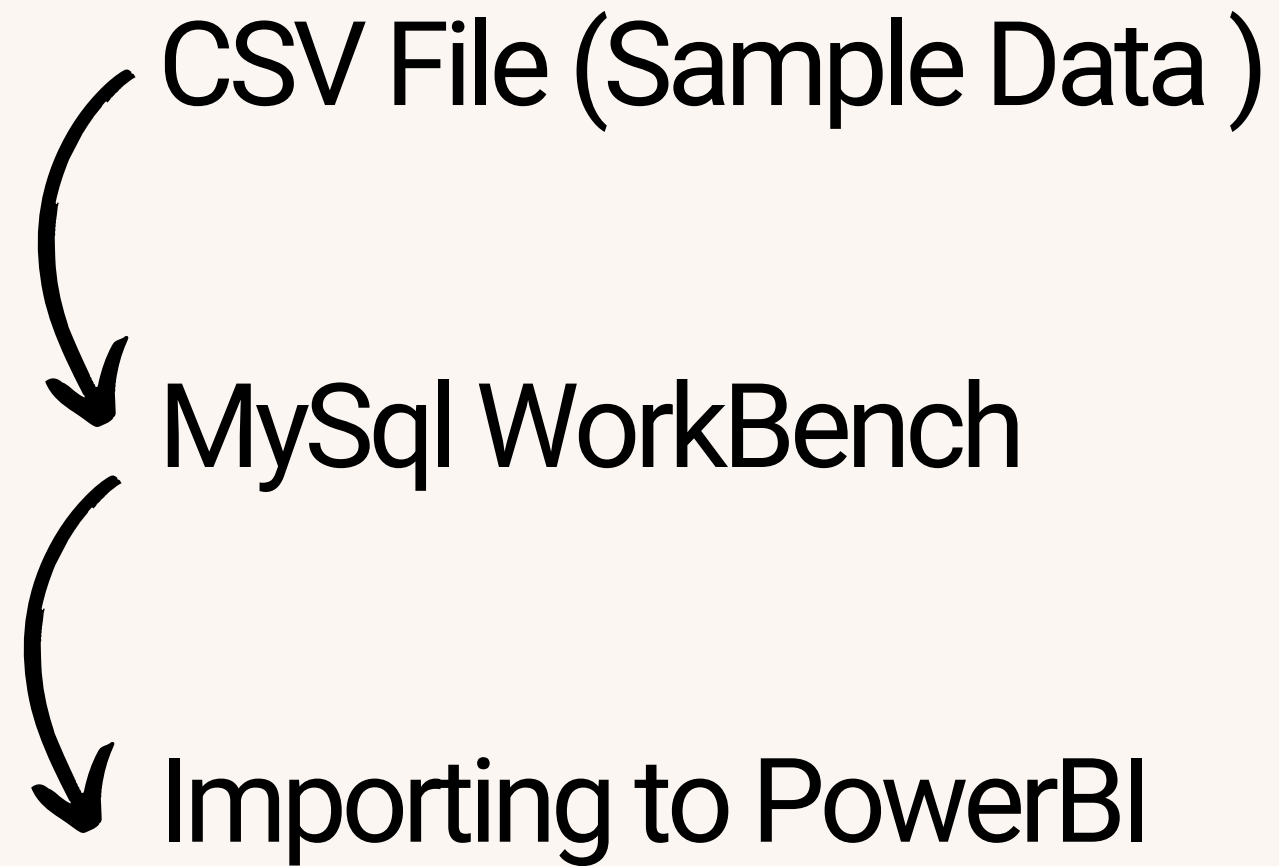


PROJECT OBJECTIVE



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.

Importing Data



*We Can directly import CSV file in PowerBI but really wanted to learn the intigration of MySql in PowerBI





Fixed Date-Time (CSV)

I separated the dates into three different columns in Excel (day, month, and year). Then, I used the DATE function in a fourth column to combine them and display them as a proper date.

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Fixed Column Name in Workbench

```
ALTER TABLE cust_details  
RENAME COLUMN i»¿Client_Num to Client_Num;
```

Result Grid  Filter Rows: <input type="text"/> Export:  Wrap Cell Content:  Fetch rows: 									
	i»¿Client_Num	Customer_Age	Gender	Dependent_Count	Education_Level	Marital_Status	state_cd	Zipcode	Car_Owner
▶	708082083	24	F	1	Uneducated	Single	FL	91750	no
	708083283	62	F	0	Unknown	Married	NJ	91750	no
	708084558	32	F	1	Unknown	Married	NJ	91750	yes
	708085458	38	M	2	Uneducated	Single	NY	91750	no
	708086958	48	M	4	Graduate	Single	TX	91750	yes
	708095133	33	F	1	High School	Single	NY	91750	no
	708008133	34	F	2	Graduate	Single	CA	91750	yes

Importing Data in PowerBI

Navigator

Display Options

localhost:3306: ccdb [2]

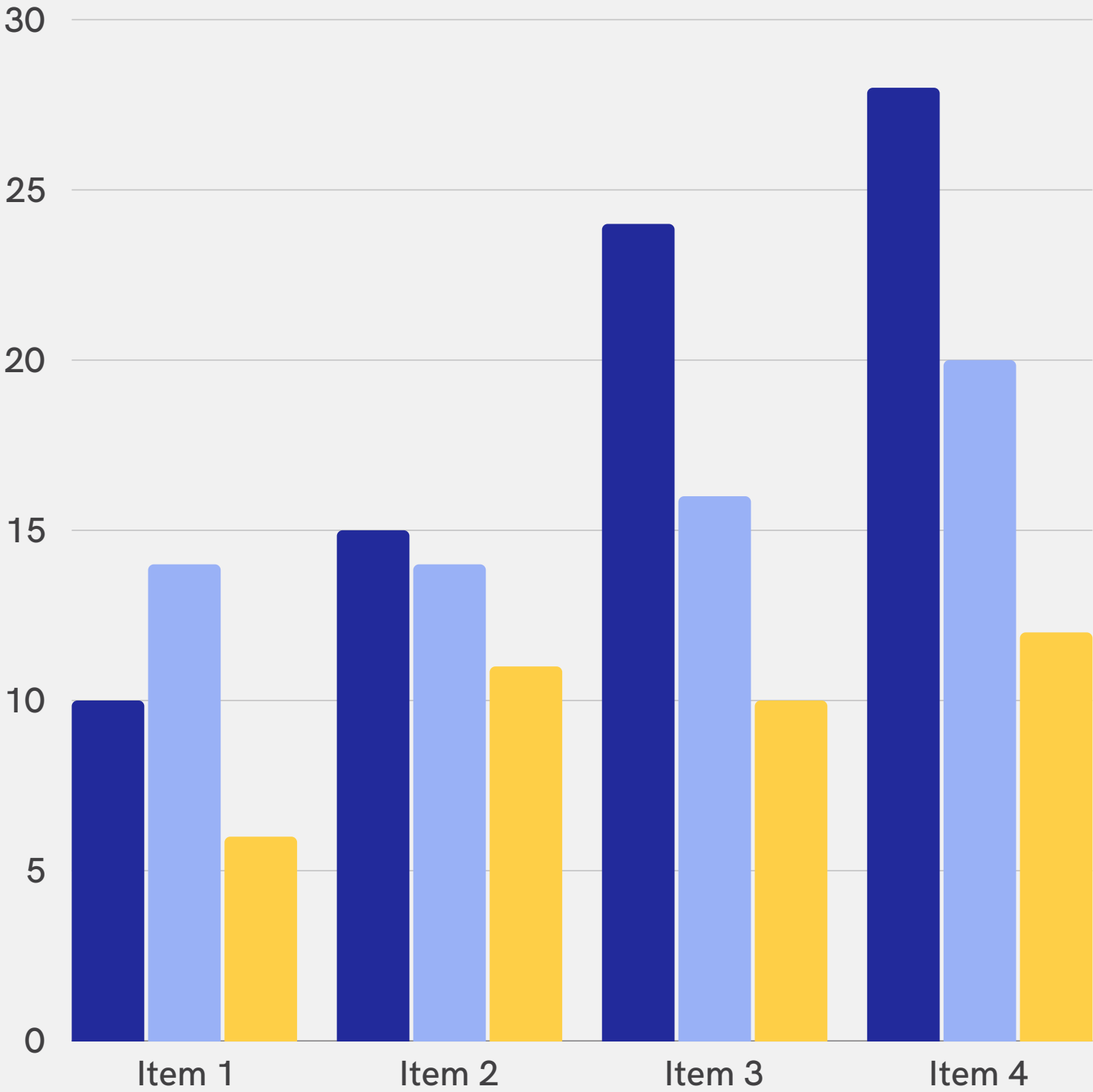
ccdb.cc_details

ccdb.cust_details

ccdb.cust_details

Client_Num	Customer_Age	Gender	Dependent_Count	Education_Level
708082083	24	F	1	Uneducated
708083283	62	F	0	Unknown
708084558	32	F	1	Unknown
708085458	38	M	2	Uneducated
708086958	48	M	4	Graduate
708095133	33	F	1	High School
708098133	34	F	3	Graduate
708099183	34	F	2	Uneducated
708100533	48	M	2	High School
708103608	53	F	1	Graduate
708104658	31	F	0	Post-Graduate
708108333	34	F	4	Graduate
708112008	51	F	2	Graduate
708113208	36	M	1	High School
708117933	49	F	4	Graduate
708119658	53	F	2	Graduate
708121908	49	F	1	Graduate
708123033	47	F	5	Graduate
708125733	43	F	4	Graduate
708128733	47	M	3	Graduate
708129933	34	F	3	Uneducated
708132783	37	F	5	Unknown
708134283	63	M	0	Graduate

Creating Filters Using DAX Query



Creating Groups

- **Age Group Filter**

Added a new column name “Age Group” in customer_detail and categorised the data into 6 categories.

1. 20-30
2. 30-40
3. 40-50
4. 50-60
5. 60+
6. “Unknown”

```
1 AgrGroup = SWITCH(  
2     True(),  
3     'ccdb cust_detail'[Customer_Age] < 30, "20-30",  
4     'ccdb cust_detail'[Customer_Age] >= 30 && 'ccdb cust_detail'[Customer_Age] < 40, "30-40",  
5     'ccdb cust_detail'[Customer_Age] >= 40 && 'ccdb cust_detail'[Customer_Age] < 50, "40-50",  
6     'ccdb cust_detail'[Customer_Age] >= 50 && 'ccdb cust_detail'[Customer_Age] < 60, "50-60",  
7     'ccdb cust_detail'[Customer_Age] > 60, "60 +",  
8     "unknown"  
9 )
```


- Income Group Filter

Income	Category
Less than 35000	Low
35000-70000	Med
70000	High

```
1 IncomeGroup = SWITCH(  
2     TRUE(),  
3     'ccdb cust_detail'[Income] < 35000, "Low",  
4     'ccdb cust_detail'[Income] >= 35000 && 'ccdb cust_detail'[Income] < 70000, "Med",  
5     'ccdb cust_detail'[Income] >= 70000, "High",  
6     "Unknown"  
7 )  
8
```

- Revenue Filter

```
1 Revenue = 'ccdb cc_detail'[Annual_Fees] + 'ccdb cc_detail'[Total_Trans_Amt] + 'ccdb cc_detail'[Interest_Earned]
```

- Week Number Filter

```
1 Week_num2 = WEEKNUM('ccdb cc_detail'[Week_Start_Date])
```

- Current Week Revenue

```
1 Current_week_Revenue = CALCULATE(  
2     SUM('cc_details'[Revenue]),  
3     FILTER(  
4         ALL(cc_details),  
5         cc_details[Week_Num2] = MAX(cc_details[Week_Num2]))
```

- Week Over Week Revenue

```
1 Wow_revenue = DIVIDE([Current_week_Revenue] - [Previous_week_Revenue], [Previous_week_Revenue])
```

Project Insights- Week 53 (31st Dec)

WoW change:

- Revenue increased by 28.8%

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%



Dashboard Link :-

<https://app.powerbi.com/groups/me/reports/6166acf9-97b4-44bf-a2df-1324f5d32cd3/c5d21e73c638f48347e3?experience=power-bi>

