CREDIT CARD

WEEKLY STATUS REPORT
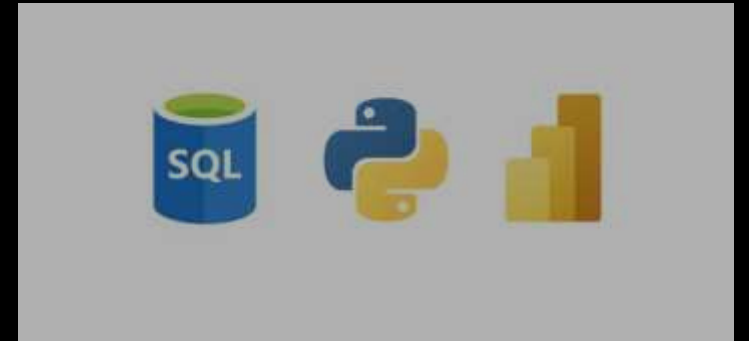

By

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Content

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.

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 52 (24th Dec)

WoW change:

• Revenue decreased by 12.8%,

• Total Transaction Amt decreased from 14.2M to 13.3M

• Total Transaction count decreased from 166.6K to 161.6K

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%

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.

THANK YOU