

Welcome : Banking Insights



Banking Insights : Customer Overview

Card

Total Customers
100

Slicers

Gender

- ☐ F
☐ M

AccountType

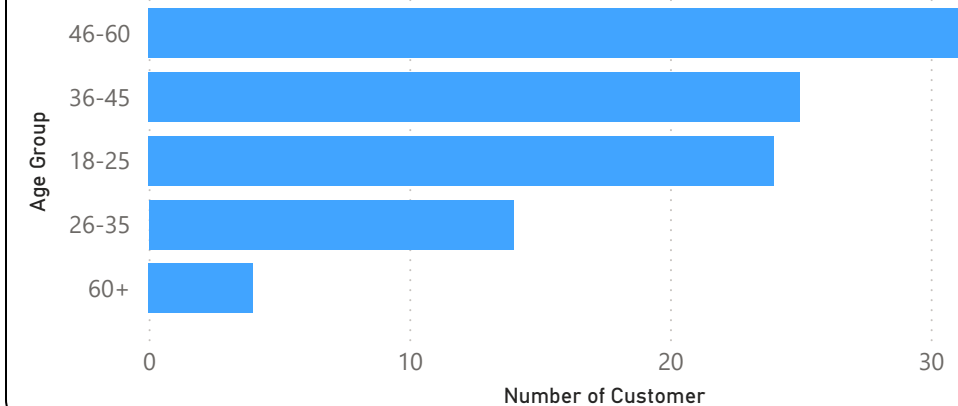
- ☐ Current
☐ Savings

Name

All

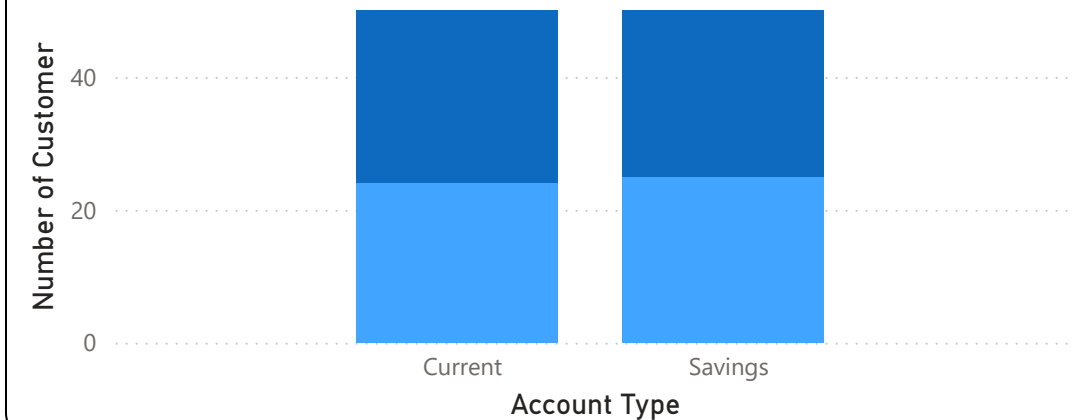
Name	Open Date	Age	Gender	City	Account Type
Tracy Morales	16 July 2020	59	M	Thomasbury	Current
Michele Campbell	17 July 2020	54	M	Shawside	Savings
Alison Coleman	24 July 2020	22	M	Trevorhaven	Savings
Nicole Flores	02 August 2020	20	F	Kennedyberg	Savings
Jennifer Wu	02 October 2020	53	M	Williamsville	Current
Anita Perry	17 October 2020	32	F	South Katelynport	Current
Anita Cox	27 October 2020	42	F	Port Steven	Savings
Andrew Allen	17 November 2020	19	M	Pamelashire	Savings
Michael Wade	26 November 2020	39	F	Terrishire	Current
Mark Mendoza	24 December 2020	34	F	Nancyside	Current
Spencer Fowler	06 January 2021	59	F	West Denisebury	Savings
Keith Romero	21 January 2021	42	M	New Marcus	Savings
Tanya Miller	19 February 2021	28	F	New Nancy	Current
James Evans	12 May 2021	43	F	Jasonville	Savings
Sydney Burns	20 May 2021	55	F	Port Johnmouth	Savings
Zachary Casey	31 July 2021	43	F	Walkerborough	Current
Jose Mccarthy	09 September 2021	38	M	Smithtown	Savings
Carla Russo	19 September 2021	20	M	East Kyle	Current
Brittany Allen	06 October 2021	19	F	West Timothy	Savings
Cynthia Fox	18 October 2021	22	F	Mcclurechester	Current
Audrey Hunter	25 October 2021	28	F	Mallorytown	Current
Timothy Sullivan	04 November 2021	56	F	Brownfort	Savings
Angela Russell	29 November 2021	59	M	Kaylashire	Current
Erin Nguyen	01 December 2021	57	M	East Jenniferview	Savings

Customers by Age Group



Account Type based on Gender

Gender ● F ● M




Banking Insights : Transaction Insights


Card


Total Transaction
200

Avg. Transaction
26,198

Slicers

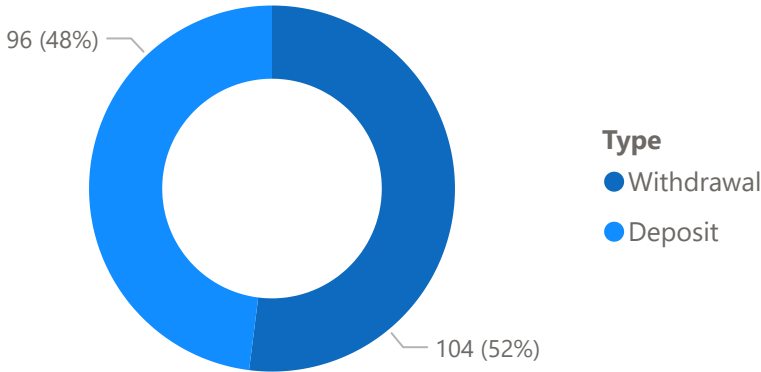
Transaction Type 
☐ Deposit
☐ Withdrawal

Channel 

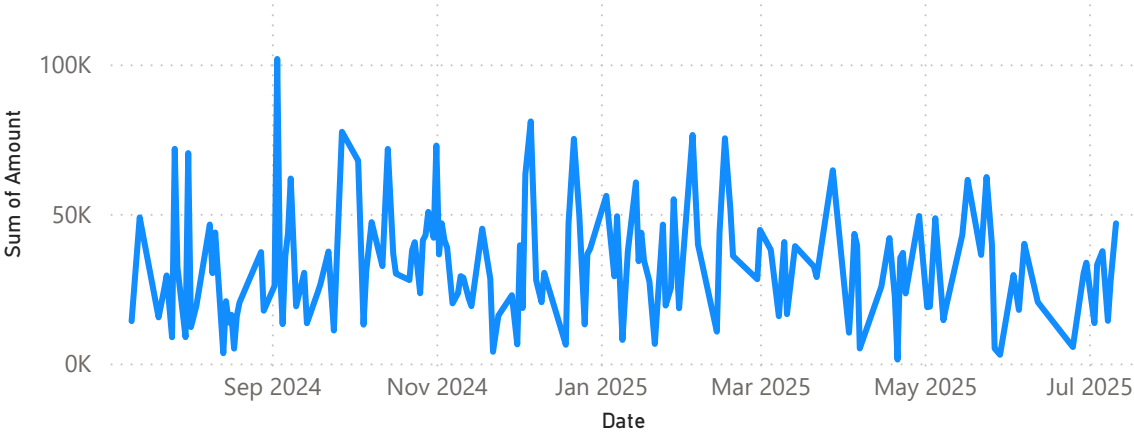
All 

Customer ID	Name	Amount	City	Date
CUST1055	Robert Barry	49,285.51	Morenochester	29 April 2025
CUST1031	John Chambers	49,119.45	North Laura	16 February 2025
CUST1032	Melissa Mann MD	49,037.15	New Theodorefort	03 September 2024
CUST1021	Anita Perry	48,821.93	South Katelynport	14 July 2024
CUST1042	Zachary Casey	48,709.42	Walkerborough	14 October 2024
CUST1024	Carla Russo	48,553.29	East Kyle	05 May 2025
CUST1005	Cody Ponce	47,228.49	Turnerstad	08 October 2024
CUST1022	Timothy Sullivan	46,961.85	Brownfort	03 January 2025
CUST1041	Jose Anderson	46,845.98	Lake Annahaven	29 October 2024
CUST1036	Julie Miller	46,833.52	Huertabury	11 July 2025
CUST1005	Cody Ponce	46,813.32	Turnerstad	03 November 2024
CUST1013	Adam Rodriguez	46,716.41	Suzanneside	20 December 2024
CUST1045	Audrey Hunter	46,410.66	Mallorytown	24 January 2025
CUST1061	William White	46,175.19	Brianstad	06 December 2024
CUST1014	Jacob Hughes	45,301.71	Smithville	14 January 2025
CUST1004	Angela Russell	45,163.89	Kaylashire	24 May 2025
CUST1041	Jose Anderson	45,041.80	Lake Annahaven	18 November 2024
CUST1092	Melissa Daniels	44,644.49	Vickimouth	01 March 2025
CUST1041	Jose Anderson	44,505.26	Lake Annahaven	04 February 2025
CUST1011	Daniel Martin	44,156.07	South Cynthia	22 December 2024
CUST1033	Michael Francis	43,926.48	Mackside	14 February 2025
CUST1028	Jennifer Marshall	43,907.60	Matthewland	27 September 2024
CUST1035	Christopher Patton	43,762.73	Madisonborough	11 August 2024
CUST1038	Michael Nguyen	43,698.31	West Vickieton	16 January 2025
CUST1023	Dr. Melanie Wright	43,622.90	Joelhaven	07 September 2024

Transaction Type



Transactions over Time



Banking Insights : Loan Analysis

Card

Total Loans

80

Active Loans

18

Slicers

Status

All

Name

All

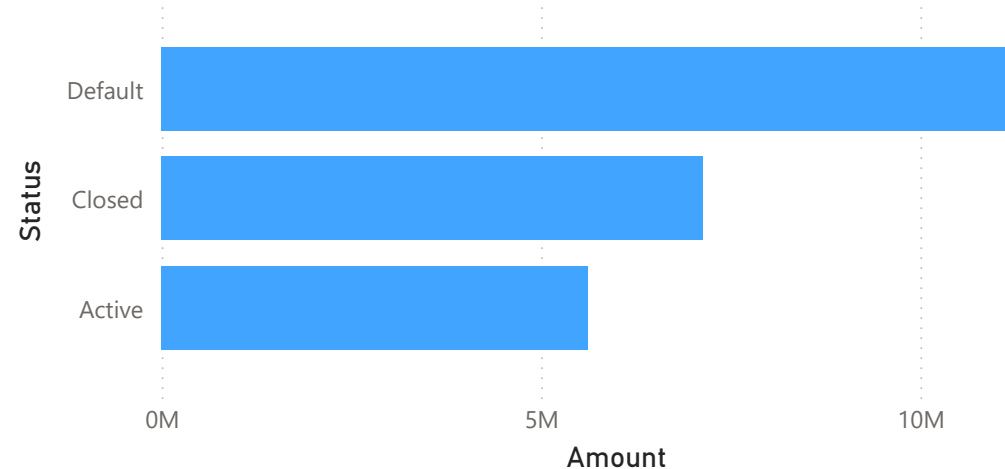
KPI Card

Default Rate (%)

0.45

Loan ID	Customer ID	Name	Amount	Default Date	Status
LN1067	CUST1001	Michele Campbell	471988	21 November 2023	Default
LN1051	CUST1004	Angela Russell	477291	05 July 2025	Active
LN1001	CUST1005	Cody Ponce	461332	24 February 2023	Default
LN1011	CUST1005	Cody Ponce	374002	21 September 2023	Closed
LN1056	CUST1005	Cody Ponce	65557	10 February 2023	Closed
LN1061	CUST1007	Connor Mendoza	131153	05 September 2022	Default
LN1012	CUST1009	Michelle Adkins	407750	09 September 2023	Closed
LN1032	CUST1009	Michelle Adkins	422334	28 September 2022	Default
LN1060	CUST1010	Carmen Thomas	324609	10 February 2024	Closed
LN1062	CUST1010	Carmen Thomas	91134	06 October 2023	Closed
LN1073	CUST1010	Carmen Thomas	495423	24 May 2023	Closed
LN1021	CUST1011	Daniel Martin	346533	15 December 2024	Default
LN1066	CUST1011	Daniel Martin	201803	06 February 2024	Default
LN1071	CUST1015	Lori Perez	138664	27 May 2025	Closed
LN1054	CUST1016	Lauren Johnson DDS	464707	08 September 2023	Default
LN1057	CUST1016	Lauren Johnson DDS	395601	11 April 2025	Active
LN1000	CUST1018	Peter Walker	63769	09 September 2023	Closed
LN1031	CUST1021	Anita Perry	66071	14 April 2024	Closed
LN1074	CUST1024	Carla Russo	364297	26 September 2022	Active
LN1033	CUST1025	Bill Shelton	269033	06 April 2023	Active
LN1036	CUST1025	Bill Shelton	372570	25 January 2023	Default
LN1055	CUST1026	Jeffery Nunez	121670	31 January 2024	Default
LN1068	CUST1026	Jeffery Nunez	239135	01 December 2024	Closed
LN1077	CUST1029	Samantha Lawrence	463920	03 July 2023	Default
LN1002	CUST1031	John Chambers	139582	13 September 2022	Active
LN1070	CUST1031	John Chambers	220120	20 February 2023	Default

Loan Amount by Status



Loan Date Vs Amount

