**BANK LOAN REPORT QUERY DOCUMENT**

1. **BANK LOAN REPORT | SUMMARY**

**KPI’s:**

**Total Loan Applications**

SELECT COUNT(id) AS Total\_Applications FROM bank\_loan\_data



**MTD Loan Applications**

SELECT COUNT(id) AS Total\_Applications FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 12



**PMTD Loan Applications**  
SELECT COUNT(id) AS Total\_Applications FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 11



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**Total Funded Amount**

SELECT SUM(loan\_amount)

AS Total\_Funded\_Amount FROM bank\_loan\_data



**MTD Total Funded Amount**  
SELECT SUM(loan\_amount) AS Total\_Funded\_Amount FROM bank\_loan\_data  
WHERE MONTH(issue\_date) = 12



**PMTD Total Funded Amount**  
SELECT SUM(loan\_amount) AS Total\_Funded\_Amount FROM bank\_loan\_data  
WHERE MONTH(issue\_date) = 11



**Total Amount Received**

SELECT SUM(total\_payment) AS Total\_Amount\_Collected FROM bank\_loan\_data



**MTD Total Amount Received**

SELECT SUM(total\_payment) AS Total\_Amount\_Collected FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 12



**PMTD Total Amount Received**

SELECT SUM(total\_payment) AS Total\_Amount\_Collected FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 11



**Average Interest Rate**

SELECT AVG(int\_rate)\*100 AS Avg\_Int\_Rate FROM bank\_loan\_data



**MTD Average Interest**

SELECT AVG(int\_rate)\*100 AS MTD\_Avg\_Int\_Rate FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 12



**PMTD Average Interest**

SELECT AVG(int\_rate)\*100 AS PMTD\_Avg\_Int\_Rate FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 11



**Avg DTI**

SELECT AVG(dti)\*100 AS Avg\_DTI FROM bank\_loan\_data



**MTD Avg DTI**

SELECT AVG(dti)\*100 AS MTD\_Avg\_DTI FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 12



**PMTD Avg DTI**

SELECT AVG(dti)\*100 AS PMTD\_Avg\_DTI FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 11



**GOOD LOAN ISSUED**

**Good Loan Percentage**

SELECT

    (COUNT(CASE WHEN loan\_status = 'Fully Paid' OR loan\_status = 'Current' THEN id END) \* 100.0) /

COUNT(id) AS Good\_Loan\_Percentage

FROM bank\_loan\_data



**Good Loan Applications**

SELECT COUNT(id) AS Good\_Loan\_Applications FROM bank\_loan\_data

WHERE loan\_status = 'Fully Paid' OR loan\_status = 'Current'



**Good Loan Funded Amount**

SELECT SUM(loan\_amount) AS Good\_Loan\_Funded\_amount FROM bank\_loan\_data

WHERE loan\_status = 'Fully Paid' OR loan\_status = 'Current'



**Good Loan Amount Received**

SELECT SUM(total\_payment) AS Good\_Loan\_amount\_received FROM bank\_loan\_data

WHERE loan\_status = 'Fully Paid' OR loan\_status = 'Current'



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**BAD LOAN ISSUED**

**Bad Loan Percentage**

SELECT

    (COUNT(CASE WHEN loan\_status = 'Charged Off' THEN id END) \* 100.0) /

COUNT(id) AS Bad\_Loan\_Percentage

FROM bank\_loan\_data



**Bad Loan Applications**

SELECT COUNT(id) AS Bad\_Loan\_Applications FROM bank\_loan\_data

WHERE loan\_status = 'Charged Off'



**Bad Loan Funded Amount**

SELECT SUM(loan\_amount) AS Bad\_Loan\_Funded\_amount FROM bank\_loan\_data

WHERE loan\_status = 'Charged Off'



**Bad Loan Amount Received**

SELECT SUM(total\_payment) AS Bad\_Loan\_amount\_received FROM bank\_loan\_data

WHERE loan\_status = 'Charged Off'

  
  
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**LOAN STATUS**

SELECT

        loan\_status,

        COUNT(id) AS LoanCount,

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

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

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

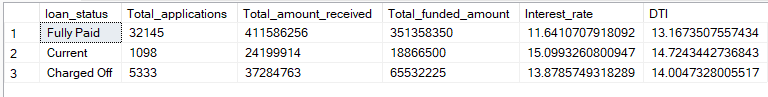
        AVG(dti \* 100) AS DTI

    FROM

        bank\_loan\_data

    GROUP BY

        loan\_status



**MTD total amount received and total funded amount**

SELECT

loan\_status,

SUM(total\_payment) AS MTD\_Total\_Amount\_Received,

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

FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 12

GROUP BY loan\_status



1. **BANK LOAN REPORT | OVERVIEW**

**MONTH**

SELECT

MONTH(issue\_date) AS Month\_Munber,

DATENAME(MONTH, issue\_date) AS Month\_name,

COUNT(id) AS Total\_Loan\_Applications,

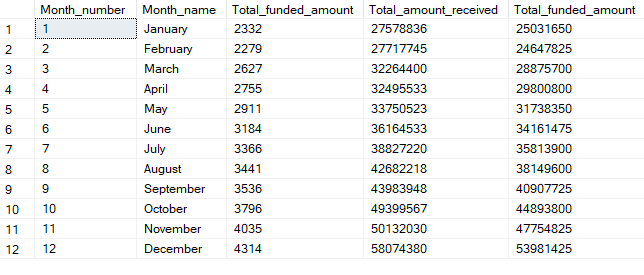
SUM(loan\_amount) AS Total\_Funded\_Amount,

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

FROM bank\_loan\_data

GROUP BY MONTH(issue\_date), DATENAME(MONTH, issue\_date)

ORDER BY MONTH(issue\_date)



**STATE**

SELECT

address\_state AS State,

COUNT(id) AS Total\_Loan\_Applications,

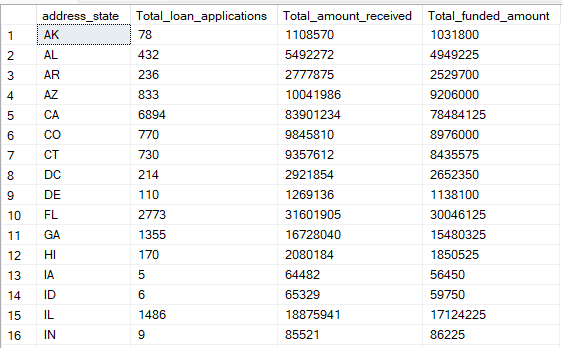
SUM(loan\_amount) AS Total\_Funded\_Amount,

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

FROM bank\_loan\_data

GROUP BY address\_state

ORDER BY address\_state



**TERM**

SELECT

term AS Term,

COUNT(id) AS Total\_Loan\_Applications,

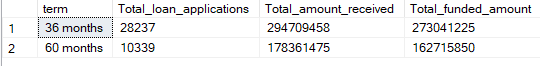
SUM(loan\_amount) AS Total\_Funded\_Amount,

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

FROM bank\_loan\_data

GROUP BY term

ORDER BY term



**EMPLOYEE LENGTH**

SELECT

emp\_length AS Employee\_Length,

COUNT(id) AS Total\_Loan\_Applications,

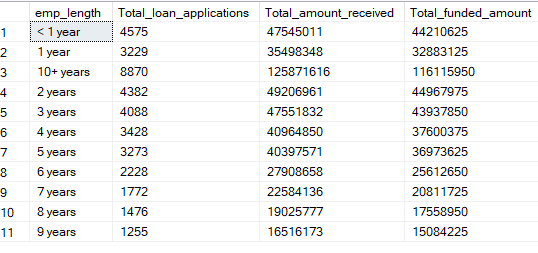
SUM(loan\_amount) AS Total\_Funded\_Amount,

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

FROM bank\_loan\_data

GROUP BY emp\_length

ORDER BY emp\_length



**PURPOSE**

SELECT

purpose AS PURPOSE,

COUNT(id) AS Total\_Loan\_Applications,

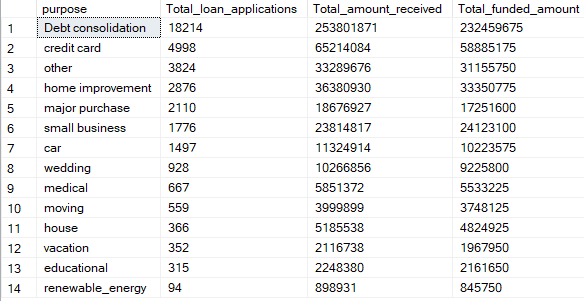
SUM(loan\_amount) AS Total\_Funded\_Amount,

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

FROM bank\_loan\_data

GROUP BY purpose

ORDER BY purpose



**HOME OWNERSHIP**

SELECT

home\_ownership AS Home\_Ownership,

COUNT(id) AS Total\_Loan\_Applications,

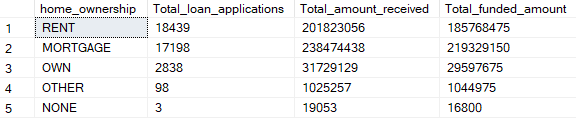
SUM(loan\_amount) AS Total\_Funded\_Amount,

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

FROM bank\_loan\_data

GROUP BY home\_ownership

ORDER BY home\_ownership



*Note: We have applied multiple Filters on all the dashboards. You can check the results for the filters as well by modifying the query and comparing the results.*

*For e.g*

*See the results when we hit the Grade A in the filters for dashboards.*

SELECT

purpose AS PURPOSE,

COUNT(id) AS Total\_Loan\_Applications,

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

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

FROM bank\_loan\_data

WHERE grade = 'A'

GROUP BY purpose

ORDER BY purpose