



Credit Card Weekly Status Report

Real-time insights and performance analytics for informed decision-making



AGENDA

Power BI Project Overview

01

Project Objective

Define goals and success metrics for the dashboard

02

Data from SQL

Extract transaction and customer data from database

03

Data Processing & DAX

Transform data and create calculated measures

04

Dashboard & Insights

Build visualizations and analyze key trends

05

Export & Share Project

Distribute findings to stakeholders

Project Objective

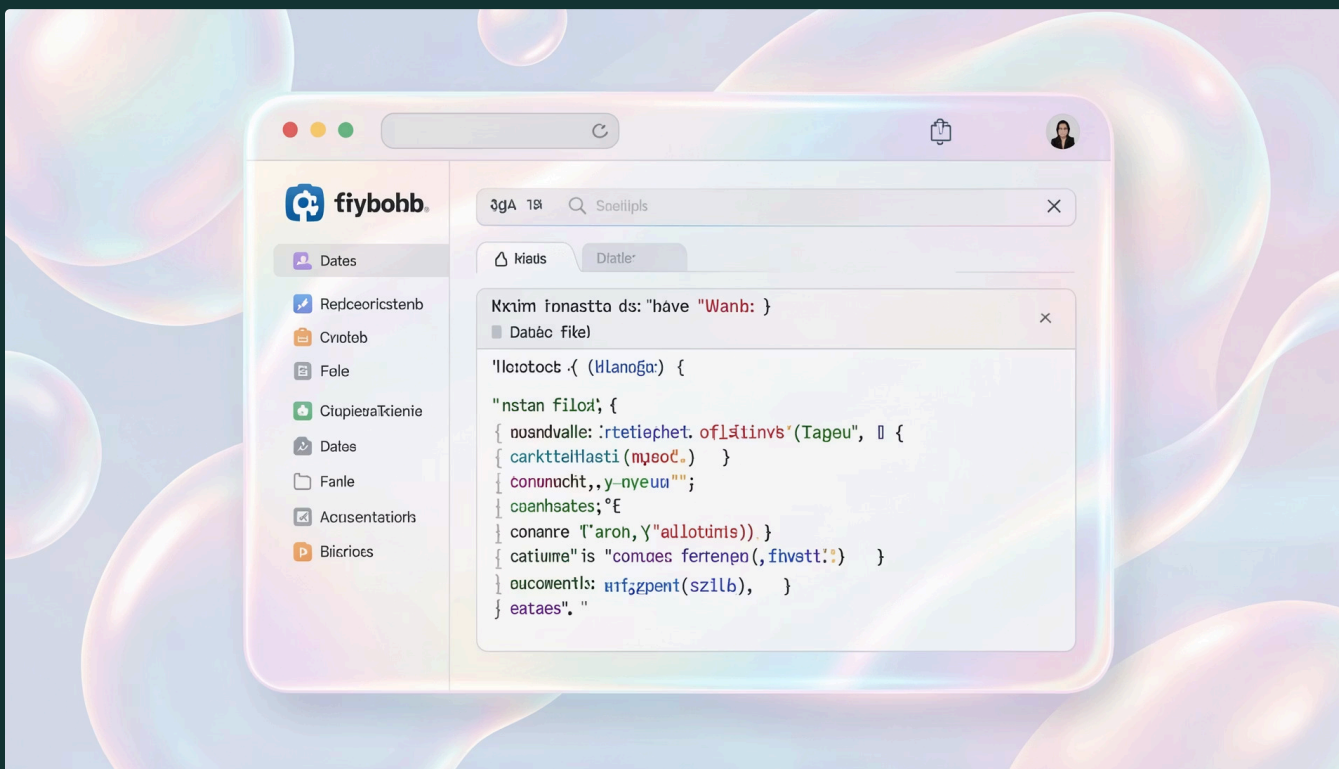
Comprehensive Monitoring

Develop a credit card weekly dashboard delivering real-time insights into key performance metrics and emerging trends

Stakeholder Enablement

Empower decision-makers to monitor and analyze credit card operations effectively with actionable intelligence





Download Data

Access the complete dataset from our GitHub repository to begin your analysis.

Repository:

https://github.com/Shilpaprashar/Credit_Card_Financial_Dashboard

This repository contains all necessary CSV files for credit card transactions and customer details.

Import Data to SQL Database



Prepare CSV File

Clean and format your data files for import



Create Tables in SQL

Define schema and structure for data storage



Import CSV into SQL

Load data into database tables

DAX Queries: Customer Segmentation

AgeGroup Classification

```
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 Classification

```
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"
)
```

These DAX measures segment customers by age and income levels, enabling targeted analysis and personalized insights.

DAX Queries: Revenue Calculations

Week Number

```
week_num2 =  
WEEKNUM('public  
cc_detail'[week_start_  
date])
```

Total Revenue

```
Revenue = 'public  
cc_detail'[annual_fees  
] +  
'public  
cc_detail'[total_trans_  
amt] +  
'public  
cc_detail'[interest_ear  
ned]
```

Current Week Revenue

```
Current_week_Revenue = CALCULATE(  
SUM('public  
cc_detail'[Revenue]),  
FILTER(ALL('public  
cc_detail'),  
'public  
cc_detail'[week_num2  
] =  
MAX('public  
cc_detail'[week_num2  
])))
```

Previous Week Revenue

```
Previous_week_Revenue = 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 53 (Dec 31)

Week-over-Week Changes

28.8%

Revenue Growth

Strong weekly performance

57.5%

Activation Rate

Customer engagement

6.06%

Delinquent Rate

Risk management metric

Year-to-Date Performance

- **Overall revenue:** \$57M driven by strong transaction volume
- **Total interest earned:** \$8M from customer balances
- **Total transaction amount:** \$46M across all cards
- **Gender distribution:** Male customers contribute \$31M, female \$26M
- **Card performance:** Blue & Silver cards drive 93% of transactions
- **Geographic concentration:** TX, NY & CA represent 68% of revenue

Overall Summary

Credit Card Financial Dashboard Using Power BI



Interactive Development

Built a comprehensive dashboard using transaction and customer data from SQL database to deliver real-time insights



Streamlined Processing

Optimized data processing and analysis workflows to efficiently monitor key performance metrics and identify trends



Actionable Intelligence

Delivered insights to stakeholders based on dashboard findings, supporting strategic decision-making processes



Next Steps



Continuous Monitoring

Track weekly trends and adjust strategies based on emerging patterns



Optimize Performance

Focus on high-performing regions and customer segments to maximize revenue



Stakeholder Engagement

Schedule regular reviews with leadership to align on priorities and actions

Thank you for your attention. Questions and feedback are welcome.