

CREDIT CARD

WEEKLY STATUS REPORT

Presenter name - Shubham



Project Objective

To create a thorough weekly stakeholders effective real-time insights into key performance indicators and trends, allowing them to monitor and assess credit card operations.



IMPORT DATA TO SQL DATABASE

1. Prepare csv file
2. Create tables in SQL
3. Import csv file into SQL



Excel



Data Output	Messages	Notifications
COPY 10108		
Query returned successfully in 82 msec.		

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_Cal** = 'public cc_detail'[annual_fees] + 'public cc_detail'[total_trans_amt] + 'public cc_detail'[interest_earned]
- **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** =
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 (31st Dec)

WoW change:

- Revenue increased by **28.8%**,
- Customer count increased by = **1.80%**

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%**
- Overall **70.26 %** Card using via swipe.



THANK YOU

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GitHub-

https://github.com/Shubham-811/Creditcard_Financial_Dashboard

LinkedIn-

<https://www.linkedin.com/in/shubham-fendar-a82616177/>