

CREDIT CARD

WEEKLY
STATUS REPORT

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Project Objective

To create a detailed weekly credit card dashboard that delivers real-time insights into critical performance indicators and trends, helping stakeholders efficiently track and evaluate credit card operations.

Import data to SQL database

1. Prepare csv file
2. Create tables in SQL
3. import csv file into SQL(MY SQL SERVER)



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

DAXQueries

```
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

Revenue = '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 (31stDec)

WoW change:

- Revenue increased by 28.8%,
- Total Transaction Amt & Count increased by xx% & xx%
- Customer count increased by xx%

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%

Add to resume

Credit Card Financial Dashboard | Power BI

- Designed an interactive Power BI dashboard integrating customer and transaction data from a SQL database to deliver real-time insights.
- Enhanced data transformation and analytics processes to effectively monitor KPIs and identify performance trends.
- Delivered actionable insights to stakeholders, supporting strategic decisions through data visualization and storytelling.



Thank You