CREDIT CARD

WEEKLY STATUS REPORT

Content in this tutorial video

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3. Data processing & DAX
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Project Objective

To develop a comprehensive credit card weekly dashboard that provides real-time insights into key performance metrics and trends, enabling stakeholders to monitor and analyze credit card operations effectively.

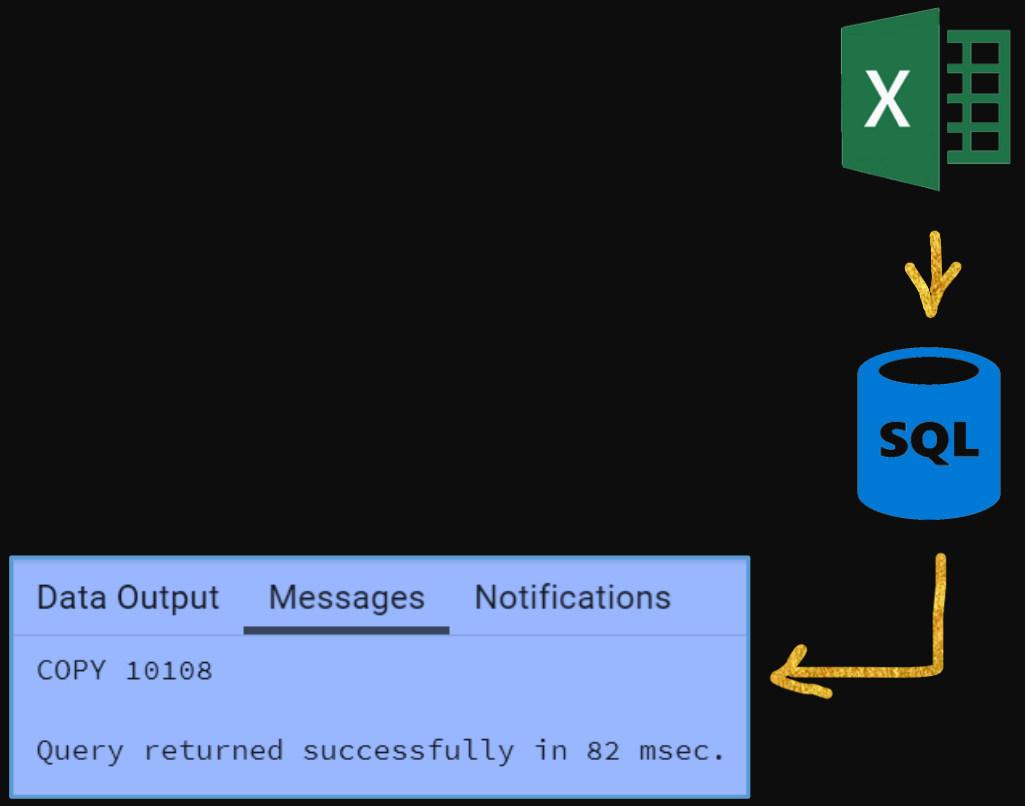
Download Data

GitHub:

Sumit123sm/Credit_Card_Financial_Dashboard: Power bi dashboard (github.com)

Import data to SQL database

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

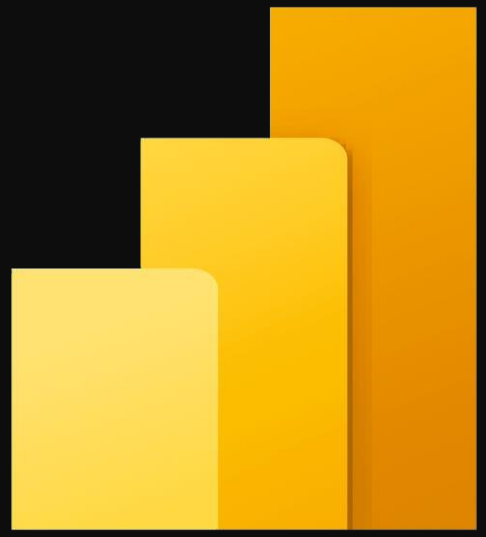


NOTE: Find all SQL queries & project data- Sumit123sm/Credit_Card_Financial_Dashboard: Power bi dashboard (github.com)

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"
)
```



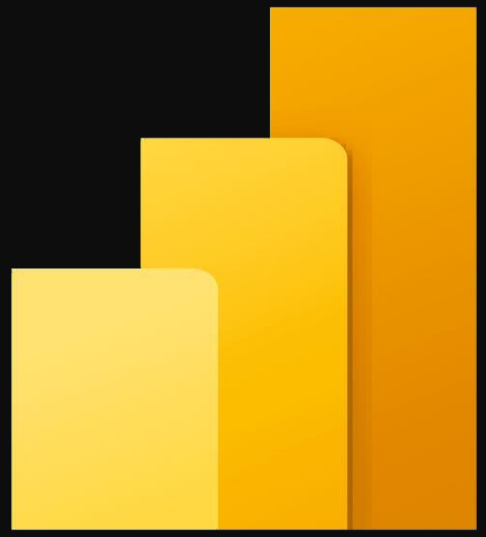
DAX Queries

week_num2 = WEEKNUM('public cc_detail'[week_start_date])

Revenue = 'public cc_detail'[annual_fees] + 'public cc_detail'[total_trans_amt] + 'public cc_detail'[interest_earned]

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

Previous_week_Reveneue = CALCULATE(
SUM('public cc_detail'[Revenue]),
FILTER(
ALL('public cc_detail'),
'public cc_detail'[week_num2] = MAX('public cc_detail'[week_num2])-1))



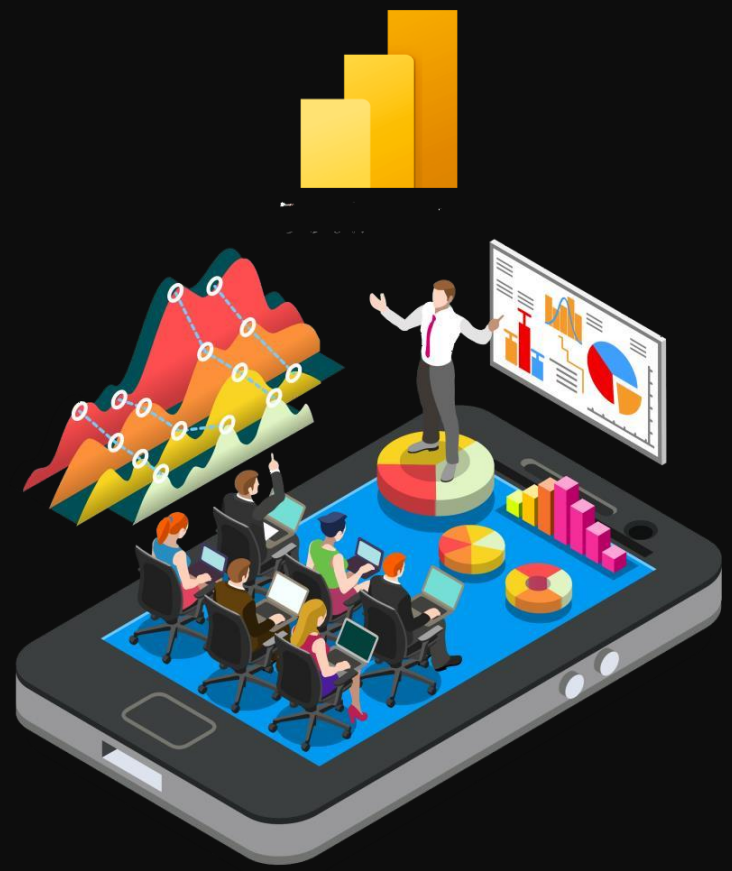
Project Insights- Week 53 (31st Dec)

WoW change:

- Revenue increased by 28.8%,
- 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%



Note: You can add more insights

Add to resume

Credit card financial dashboard using Power BI:

- Developed an interactive dashboard using transaction and customer data from a SQL database, to provide real-time insights.
- Streamlined data processing & analysis to monitor key performance metrics and trends.
- Shared actionable insights with stakeholders based on dashboard findings to support decision-making processes.

Thank You !!