

Global Bank: Mortgage Loan Activity



This dashboard was designed to manage mortgage loan activity at different branches of Global Bank.

1. Mortgage Applications

Application history

Loan acceptance rate over time

Average loan amount over time

Applications under review

2. Branch Performance

Global Bank branch location

Number of loan applications received per branch

Branch ranking by number of applications

Loan acceptance rate per branch

3. Customer Characteristics

Applications by customer characteristic, over time

4. Customer Lists

Details of a particular customer's loan application(s).

Home

Mortgage Applications

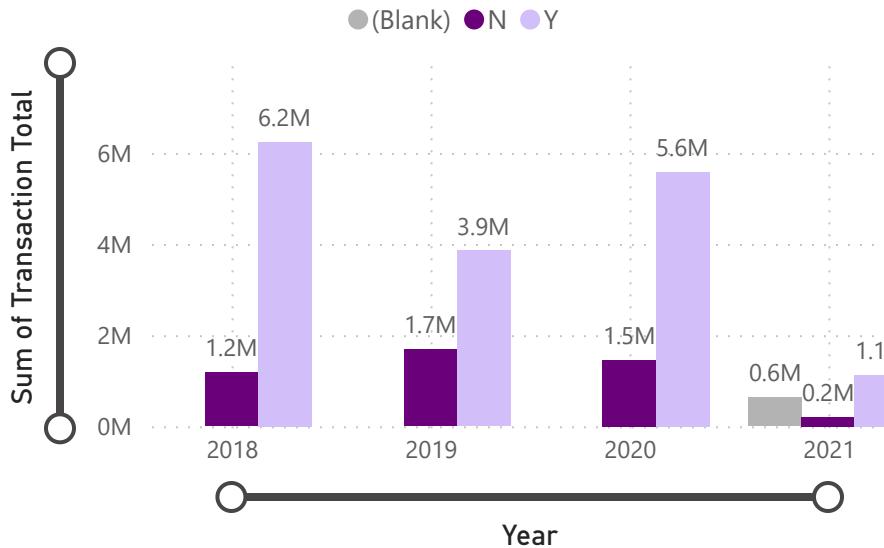
Branch Performance

Customer Characteristics

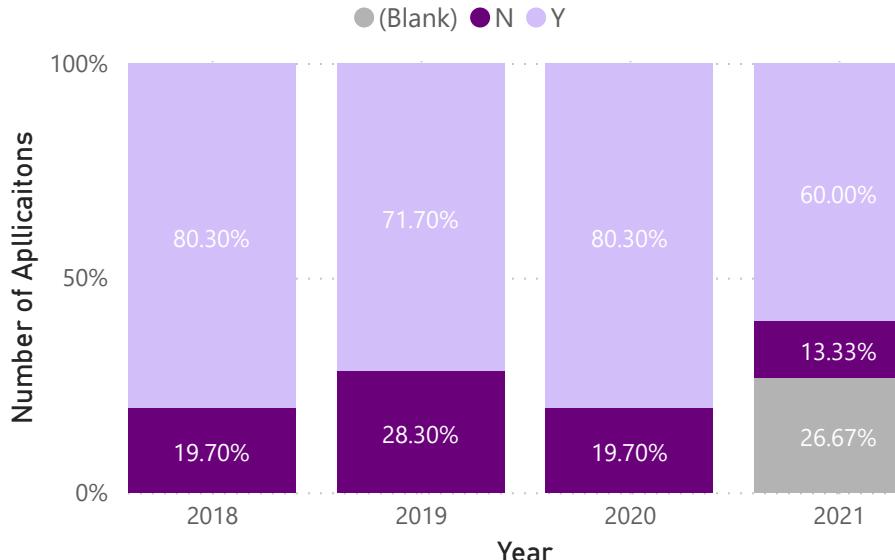
Client Lists

Mortgage Applications

Total Transaction by Year and Approval



Number of Applications by Year and Approval



1/4/2018 3/18/2021

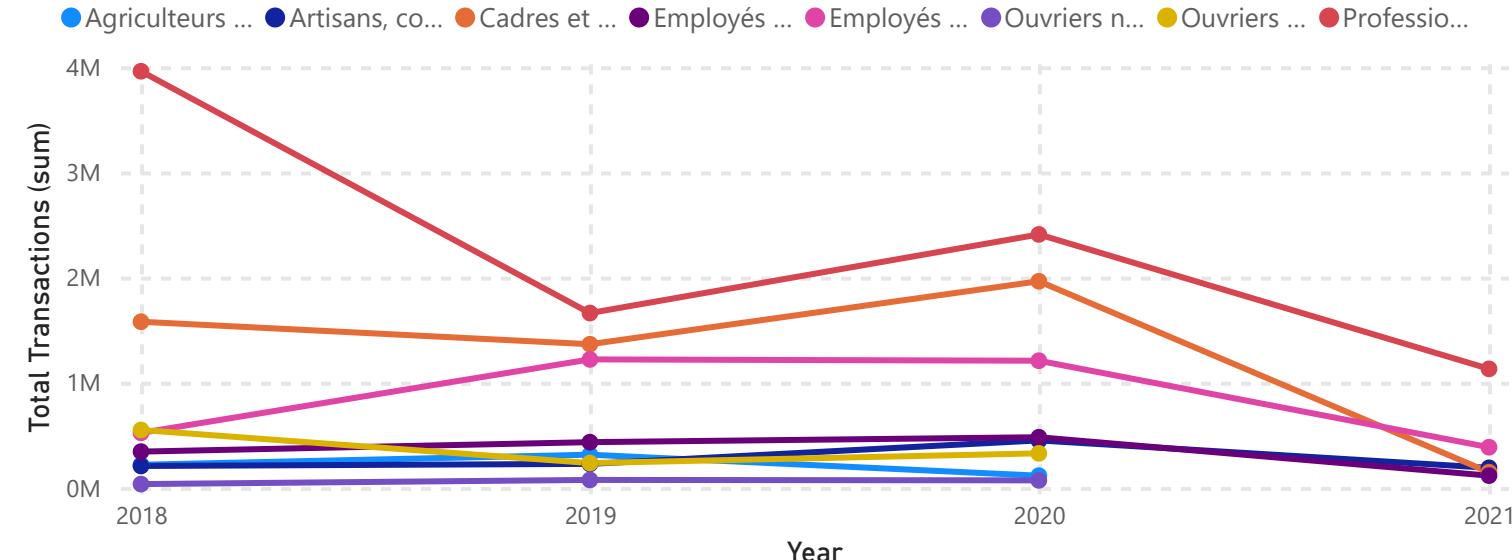


Number of Approved Loans (avg)

Approved: N (Dark Purple), Y (Light Purple)

Application Date	Total Transaction	Loan Amount	Borrower Score	Approved
04/01/2018	121,811.06	84,522	APPROVED	N
04/01/2018	124,191.48	98,846	APPROVED	Y
14/01/2018	26,914.23	22,520	APPROVED	Y
01/02/2018	62,918.94	44,942	APPROVED	N
23/02/2018	67,842.95	49,844	APPROVED	N
01/03/2018	176,890.00	155,230	APPROVED	Y
02/03/2018	113,662.36	67,270	APPROVED	Y
03/03/2018	143,135.86	87,634	APPROVED	Y
25/03/2018	93,531.20	72,534	APPROVED	Y
03/05/2018	54,989.27	44,889	APPROVED	N
21/05/2018	59,693.76	45,075	APPROVED	Y
Total		16,618,334		

Total transactions by Year and Socio-Professional Category



Branch Performance

Count of Branch Numbers by Location and City

● Brest ● Lorient ● Morlaix ● Quimper ● Rennes ● Saint-Brieuc



Count of Customers by City

Brest

35

Lorient

36

Morlaix

34

Quimper

34

Rennes

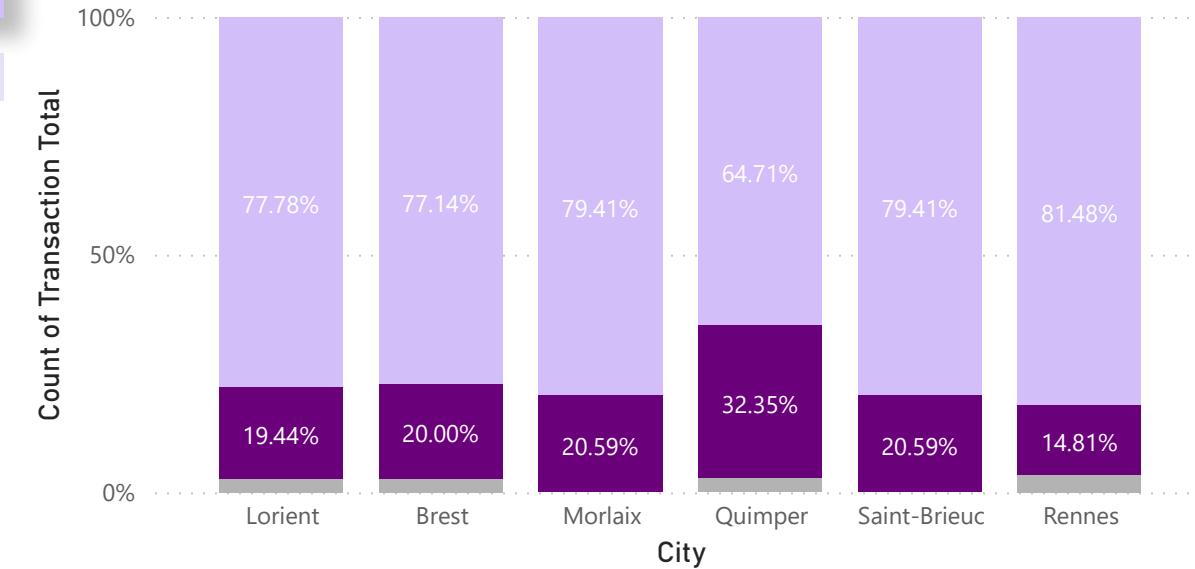
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Saint-Brieuc

34

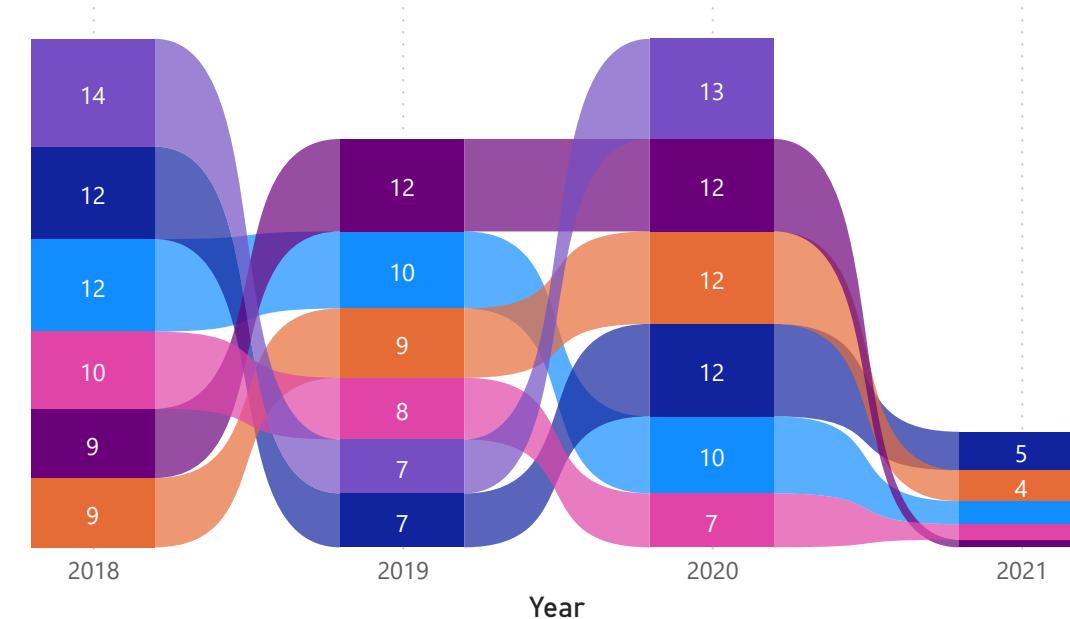
Count of Total Transactions by City and Approval

● (Blank) ● N ● Y



Count of Total Transactions by Year and City

City ● Brest ● Lorient ● Morlaix ● Quimper ● Rennes ● Saint-Brieuc



Customer Characteristics

Customer	Count of Applications	Total Transaction	Date of Birth	Approved	Borrower Score
1	1	20,668.20	10/02/1957	Y	REJECTED
1	1	143,738.56	10/02/1957	Y	REJECTED
2	1	18,550.42	22/08/1971	Y	APPROVED
2	1	112,366.31	22/08/1971	Y	APPROVED
2	1	170,767.45	22/08/1971	Y	APPROVED
3	1	52,042.90	27/01/1955	Y	REJECTED
5	1	140,784.84	11/07/1972	Y	APPROVED
5	1	174,985.86	11/07/1972	Y	APPROVED
6	1	95,434.36	01/09/1994	Y	APPROVED
7	1	132,387.71	11/11/1995	Y	APPROVED
8	1	99,045.66	04/11/1981	Y	APPROVED
9	1	133,945.91	10/02/1991	Y	REJECTED
9	1	145,453.07	10/02/1991	Y	REJECTED
10	1	61,763.52	20/02/1986	Y	APPROVED
10	1	110,301.45	20/02/1986	Y	APPROVED
Total	200				

Client Lists



Application	City	Application Date	Transaction Total	Loan Amount	Customer_ID	Customer Age	Income Regularity	Income Monthly	Payment Monthly	Approved
86	Morlaix	07/05/2019	167,561.87	140,204.83	43	70	1 : Stable	434.45	467.35	Y
171	Rennes	23/09/2020	140,011.62	108,580.44	52	70	1 : Stable	564.87	603.22	Y
195	Lorient	07/03/2021	149,902.27	125,428.43	43	70	1 : Stable	434.45	418.09	Y
6	Morlaix	30/01/2018	182,696.99	164,054.44	32	69	1 : Stable	499.80	911.41	Y
25	Rennes	03/06/2018	117,906.74	72,187.80	25	69	1 : Stable	364.05	401.04	Y
33	Brest	09/07/2018	130,466.91	101,178.42	25	69	1 : Stable	364.05	421.58	Y
41	Brest	15/08/2018	33,651.73	26,097.26	32	69	1 : Stable	499.80	144.98	Y
74	Rennes	17/02/2019	150,945.97	104,738.02	25	69	1 : Stable	364.05	581.88	Y
115	Quimper	30/11/2019	15,396.29	13,511.03	73	69	2 : Irregular	375.10	56.30	N
125	Lorient	06/02/2020	134,394.26	79,539.46	25	69	1 : Stable	364.05	441.89	Y
139	Brest	21/04/2020	37,824.57	28,561.41	32	69	1 : Stable	499.80	95.20	Y
144	Morlaix	06/05/2020	52,042.90	38,235.60	3	69	1 : Stable	602.22	159.32	Y
157	Quimper	29/06/2020	131,701.71	118,262.76	25	69	1 : Stable	364.05	394.21	Y
159	Saint-Brieuc	12/07/2020	60,364.08	38,189.52	32	69	1 : Stable	499.80	159.12	Y
4	Lorient	22/01/2018	91,562.38	72,876.18	56	68	1 : Stable	626.93	404.87	Y
11	Brest	02/03/2018	164,478.30	107,414.40	56	68	1 : Stable	626.93	596.75	Y
64	Saint-Brieuc	18/12/2018	30,766.61	23,231.93	42	68	1 : Stable	277.17	129.07	Y
91	Brest	09/06/2019	164,979.57	144,777.99	42	68	1 : Stable	277.17	482.59	Y
123	Quimper	11/01/2020	88,099.55	70,120.05	56	68	1 : Stable	626.93	389.56	Y
146	Morlaix	13/05/2020	159,207.86	120,218.18	42	68	1 : Stable	277.17	667.88	Y
183	Rennes	13/12/2020	57,388.80	40,992.00	56	68	1 : Stable	626.93	227.73	Y
17	Brest	18/04/2018	20,668.20	12,232.20	1	67	1 : Stable	1,228.71	40.77	Y
43	Morlaix	29/08/2018	92,464.47	58,497.93	64	67	1 : Stable	247.66	243.74	Y
79	Quimper	10/03/2019	143,738.56	102,670.40	1	67	1 : Stable	1,228.71	570.39	Y
120	Brest	02/01/2020	141,068.55	103,642.20	64	67	1 : Stable	247.66	575.79	Y
154	Rennes	15/06/2020	177,901.85	123,442.10	64	67	1 : Stable	247.66	411.47	Y
8	Morlaix	18/02/2018	131,700.73	96,759.72	74	65	2 : Irregular	487.43	322.53	N
52	Lorient	27/10/2018	72,024.61	63,205.27	74	65	2 : Irregular	487.43	351.14	N
07	Saint-Brieuc	17/09/2019	10,720.67	14,501.99	01	65	1 : Stable	914.00	10.24	Y
Total			16,618,334.04					344.49		