REPORT

KPI’s   
  
Total Loan Application   
SELECT COUNT(id) AS Total\_Loan\_Applications from bank\_loan\_data  
  
A blue rectangular object with black text

Description automatically generated

SELECT COUNT(id) AS MTD\_Applications from bank\_loan\_data

WHERE MONTH(issue\_date) = 12 AND YEAR(issue\_date) = 2021

A close up of a number

Description automatically generated

SELECT COUNT(id) AS PMTD\_Applications from bank\_loan\_data

WHERE MONTH(issue\_date) = 11 AND YEAR(issue\_date) = 2021

A close-up of a computer screen

Description automatically generated

SELECT SUM(loan\_amount) AS Total\_Funded\_Amount FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 12 AND YEAR(issue\_date) = 2021

A blue rectangular with black text

Description automatically generated

SELECT SUM(loan\_amount) AS MTD\_Total\_Funded\_Amount FROM bank\_loan\_data

WHERE YEAR(issue\_date) = 2021 AND MONTH(issue\_date) = 12

A close-up of a receipt

Description automatically generated

SELECT SUM(loan\_amount) AS PMTD\_Total\_Funded\_Amount FROM bank\_loan\_data

WHERE YEAR(issue\_date) = 2021 AND MONTH(issue\_date) = 11

A close-up of a number

Description automatically generated

SELECT SUM(total\_payment) AS Total\_Amount\_Received FROM bank\_loan\_data  
A close up of a number

Description automatically generated

SELECT SUM(total\_payment) AS MTDTotal\_Amount\_Received FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 12 AND YEAR(issue\_date) = 2021

A close-up of a receipt

Description automatically generated

SELECT SUM(total\_payment) AS PMTDTotal\_Amount\_Received FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 11 AND YEAR(issue\_date) = 2021

A close up of a receipt

Description automatically generated

SELECT AVG(int\_rate) AS Average\_Interest\_Rate FROM bank\_loan\_data

A close up of numbers

Description automatically generated

SELECT AVG(int\_rate) AS MTDAverage\_Interest\_Rate FROM bank\_loan\_data

WHERE MONTH(issue\_Date) = 12 AND YEAR(issue\_date) = 2021

A close-up of a number

Description automatically generated

SELECT AVG(int\_rate) AS PMTDAverage\_Interest\_Rate FROM bank\_loan\_data

WHERE MONTH(issue\_Date) = 11 AND YEAR(issue\_date) = 2021

A screen shot of a computer

Description automatically generated

SELECT

(COUNT(CASE WHEN loan\_status = 'Fully Paid' OR loan\_status = 'Current' THEN id END) \* 100)

/

COUNT(id) AS Good\_Loan\_Percentage

FROM bank\_loan\_data

A close-up of a credit card

Description automatically generated

SELECT COUNT(id) AS Good\_Loan\_Applications FROM bank\_loan\_data WHERE loan\_status = 'Fully Paid' OR loan\_status = 'Current'

A close-up of a credit card

Description automatically generated

SELECT SUM(loan\_amount) AS Total\_Funded\_Amount FROM bank\_loan\_data WHERE loan\_status = 'Fully Paid' OR loan\_status = 'Current'



SELECT SUM(total\_payment) AS Total\_Good\_Loan\_Amount FROM bank\_loan\_data WHERE loan\_status = 'Fully Paid' OR loan\_status = 'Current'

A close-up of a credit card

Description automatically generated

SELECT

(COUNT(CASE WHEN loan\_status = 'Charged Off' THEN id END) \* 100)

/

COUNT(id) AS Bad\_Loan\_Percentage

FROM bank\_loan\_data

A close-up of a sign

Description automatically generated

SELECT COUNT(id) AS Bad\_Loan\_Applications FROM bank\_loan\_data WHERE loan\_status = 'Charged Off'

A close-up of a credit card

Description automatically generated

SELECT SUM(loan\_amount) AS Total\_Bad\_Loan\_Amount FROM bank\_loan\_data WHERE loan\_status = 'Charged Off'

A close-up of a credit card

Description automatically generated

SELECT SUM(total\_payment) AS Total\_Bad\_Loan\_Amount\_Received FROM bank\_loan\_data WHERE loan\_status = 'Charged Off'

A close up of a credit card

Description automatically generated

SELECT

loan\_status,

COUNT(id) AS LoanCount,

SUM(total\_payment) AS Total\_Amount\_Received,

SUM(loan\_amount) AS Total\_Funded\_Amount,

AVG(int\_rate \* 100) AS Interest\_Rate,

AVG(dti \* 100) AS DTI

FROM

bank\_loan\_data

GROUP BY

loan\_status

A screenshot of a number

Description automatically generated

SELECT

loan\_status,

SUM(total\_payment) AS MTD\_Total\_Amount\_Received,

SUM(loan\_amount) AS MTD\_Total\_Amount\_Funded

FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 12

GROUP BY loan\_status

A screenshot of a computer

Description automatically generated

SELECT

MONTH(issue\_date),

DATENAME(MONTH, issue\_date) AS Month\_Name,

COUNT(id) AS Total\_Loan\_Applications,

SUM(loan\_amount) AS Total\_Funded\_Amount,

SUM(total\_payment) AS Total\_Amount\_Received

FROM bank\_loan\_data

GROUP BY MONTH(issue\_date), DATENAME(MONTH, issue\_date)

ORDER BY MONTH(issue\_date)

A table with numbers and text

Description automatically generated

SELECT

address\_state,

COUNT(id) AS Total\_Loan\_Applications,

SUM(total\_payment) AS Total\_Amount\_Received,

SUM(loan\_amount) AS Total\_Amount\_Funded

FROM bank\_loan\_data

GROUP BY address\_state

ORDER BY address\_state

A screenshot of a computer

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SELECT

term,

COUNT(id) AS Total\_Loan\_Applications,

SUM(total\_payment) AS Total\_Amount\_Received,

SUM(loan\_amount) AS Total\_Amount\_Funded

FROM bank\_loan\_data

GROUP BY term

ORDER BY term

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SELECT

purpose,

COUNT(id) AS Total\_Loan\_Applications,

SUM(total\_payment) AS Total\_Amount\_Received,

SUM(loan\_amount) AS Total\_Amount\_Funded

FROM bank\_loan\_data

GROUP BY purpose

ORDER BY purpose

A screenshot of a computer

Description automatically generated

SELECT

emp\_length,

COUNT(id) AS Total\_Loan\_Applications,

SUM(total\_payment) AS Total\_Amount\_Received,

SUM(loan\_amount) AS Total\_Amount\_Funded

FROM bank\_loan\_data

GROUP BY emp\_length

ORDER BY COUNT(id) DESC

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SELECT

home\_ownership,

COUNT(id) AS Total\_Loan\_Applications,

SUM(total\_payment) AS Total\_Amount\_Received,

SUM(loan\_amount) AS Total\_Amount\_Funded

FROM bank\_loan\_data

GROUP BY home\_ownership

ORDER BY home\_ownership

A white table with black text

Description automatically generated

POWER BI

Import Data from SQL Server  
  
Transform data using Power Query Editor  
  
Created a new Date table to use DAX formulas: New Table from Power Query

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