**BANK LOAN REPORT QUERY DOCUMENT**

1. **BANK LOAN REPORT | SUMMARY**

**KPI’s:**

**Total Loan Applications**

select count (id) as total\_applications from bank\_loan;



**MTD Loan Applications**

SELECT COUNT(id) AS MTD\_total\_loan\_applications

FROM bank\_loan

WHERE EXTRACT(MONTH FROM issue\_date) = 12

AND EXTRACT(YEAR FROM issue\_date) = 2021;



**PMTD Loan Applications**

SELECT COUNT(id) AS PMTD\_total\_loan\_applications

FROM bank\_loan

WHERE EXTRACT(MONTH FROM issue\_date) = 11

AND EXTRACT(YEAR FROM issue\_date) = 2021;



**Total Funded Amount**

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



**MTD Total Funded Amount**

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

FROM bank\_loan

WHERE EXTRACT(MONTH FROM issue\_date) = 12

AND EXTRACT (YEAR FROM issue\_date) = 2021;



**PMTD Total Funded Amount**

SELECT SUM(loan\_amount) AS PMTD\_Total\_Funded\_Amount

FROM bank\_loan

WHERE EXTRACT(MONTH FROM issue\_date) = 11

AND EXTRACT (YEAR FROM issue\_date) = 2021;



**Total Amount Received**

SELECT SUM(total\_payment) AS Total\_Amount\_Collected FROM bank\_loan;



**MTD Total Amount Received**

SELECT SUM(total\_payment) AS MTD\_Total\_Amount\_Collected

FROM bank\_loan

WHERE EXTRACT(MONTH FROM issue\_date) = 12

AND EXTRACT (YEAR FROM issue\_date) = 2021;



**PMTD Total Amount Received**

SELECT SUM(total\_payment) AS PMTD\_Total\_Amount\_Collected

FROM bank\_loan

WHERE EXTRACT(MONTH FROM issue\_date) = 11

AND EXTRACT (YEAR FROM issue\_date) = 2021;



**Average Interest Rate**

SELECT AVG(int\_rate)\*100 AS Avg\_Int\_Rate FROM bank\_loan;



**MTD Average Interest**

SELECT AVG(int\_rate)\*100 AS MTD\_Avg\_Int\_Rate

FROM bank\_loan

WHERE EXTRACT(MONTH FROM issue\_date) = 12

AND EXTRACT (YEAR FROM issue\_date) = 2021;



**PMTD Average Interest**

SELECT AVG(int\_rate)\*100 AS PMTD\_Avg\_Int\_Rate

FROM bank\_loan

WHERE EXTRACT(MONTH FROM issue\_date) = 11

AND EXTRACT (YEAR FROM issue\_date) = 2021;



**Avg DTI**

SELECT AVG(dti)\*100 AS Avg\_DTI FROM bank\_loan;



**MTD Avg DTI**

SELECT AVG(dti)\*100 AS MTD\_Avg\_DTI

FROM bank\_loan

WHERE EXTRACT(MONTH FROM issue\_date) = 12

AND EXTRACT (YEAR FROM issue\_date) = 2021;



**PMTD Avg DTI**

SELECT AVG(dti)\*100 AS PMTD\_Avg\_DTI

FROM bank\_loan

WHERE EXTRACT(MONTH FROM issue\_date) = 11

AND EXTRACT (YEAR FROM issue\_date) = 2021;



**GOOD LOAN ISSUED**

**Good Loan Percentage**

SELECT

(COUNT(CASE WHEN loan\_status = 'Fully Paid' OR loan\_status = 'Current' THEN id END) \* 100.0) /

COUNT(id) AS Good\_Loan\_Percentage

FROM bank\_loan;

****

**Good Loan Applications**

SELECT COUNT(id) AS Good\_Loan\_Applications FROM bank\_loan

WHERE loan\_status = 'Fully Paid' OR loan\_status = 'Current';

****

**Good Loan Funded Amount**

SELECT SUM(loan\_amount) AS Good\_Loan\_Funded\_amount FROM bank\_loan

WHERE loan\_status = 'Fully Paid' OR loan\_status = 'Current';

****

**Good Loan Amount Received**

SELECT SUM(total\_payment) AS Good\_Loan\_amount\_received FROM bank\_loan

WHERE loan\_status = 'Fully Paid' OR loan\_status = 'Current';

****

**BAD LOAN ISSUED**

**Bad Loan Percentage**

SELECT

(COUNT(CASE WHEN loan\_status = 'Charged Off' THEN id END) \* 100.0) /

COUNT(id) AS Bad\_Loan\_Percentage

FROM bank\_loan;

****

**Bad Loan Applications**

SELECT COUNT(id) AS Bad\_Loan\_Applications FROM bank\_loan

WHERE loan\_status = 'Charged Off';

****

**Bad Loan Funded Amount**

SELECT SUM(loan\_amount) AS Bad\_Loan\_Funded\_amount FROM bank\_loan

WHERE loan\_status = 'Charged Off';

****

**Bad Loan Amount Received**

SELECT SUM(total\_payment) AS Bad\_Loan\_amount\_received FROM bank\_loan

WHERE loan\_status = 'Charged Off';

****

**LOAN STATUS**

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

GROUP BY

loan\_status;

****

SELECT

loan\_status,

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

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

FROM bank\_loan

WHERE EXTRACT(MONTH FROM issue\_date) = 12

AND EXTRACT (YEAR FROM issue\_date) = 2021

GROUP BY loan\_status;

****

1. **BANK LOAN REPORT | OVERVIEW**

**MONTH**

SELECT

EXTRACT(MONTH FROM issue\_date) AS Month\_Number,

TO\_CHAR(issue\_date, 'Month') 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

GROUP BY EXTRACT(MONTH FROM issue\_date), TO\_CHAR(issue\_date, 'Month')

ORDER BY EXTRACT(MONTH FROM issue\_date);

****

**STATE**

SELECT

address\_state AS State,

COUNT(id) AS Total\_Loan\_Applications,

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

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

FROM bank\_loan

GROUP BY address\_state

ORDER BY address\_state;

****

**TERM**

SELECT

term AS Term,

COUNT(id) AS Total\_Loan\_Applications,

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

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

FROM bank\_loan

GROUP BY term

ORDER BY term;

****

**EMPLOYEE LENGTH**

SELECT

emp\_length AS Employee\_Length,

COUNT(id) AS Total\_Loan\_Applications,

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

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

FROM bank\_loan

GROUP BY emp\_length

ORDER BY emp\_length;

****

**PURPOSE**

SELECT

purpose AS PURPOSE,

COUNT(id) AS Total\_Loan\_Applications,

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

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

FROM bank\_loan

GROUP BY purpose

ORDER BY purpose;

****

**HOME OWNERSHIP**

SELECT

home\_ownership AS Home\_Ownership,

COUNT(id) AS Total\_Loan\_Applications,

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

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

FROM bank\_loan

GROUP BY home\_ownership

ORDER BY home\_ownership;

****

*Note: We have applied multiple Filters on all the dashboards. You can check the results for the filters as well by modifying the query and comparing the results.*

*For e.g*

*See the results when we hit the Grade A in the filters for dashboards.*

SELECT

purpose AS PURPOSE,

COUNT(id) AS Total\_Loan\_Applications,

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

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

FROM bank\_loan

WHERE grade = 'A'

GROUP BY purpose

ORDER BY purpose;

