CREDIT CATRD FINANCIAL REPORT (WEEKLY)

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 analyse credit card operations effectively.

STEPS

1. Prepare csv file

2. Create tables in SQL

3. import csv file into SQL

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"

)

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 35% & 3%

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%

These were a few insights that I found out from my data analysis with Power BI. Other statistics and meaningful insights are attached in the dashboard provided.