

# CREDIT CARD

## WEEKLY STATUS REPORT



# Content in this tutorial video

1. Project objective
2. Data from SQL
3. Data processing & DAX
4. Dashboard & insights
5. Export & share project



# 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:**

[https://github.com/Umang1702/Credit\\_Card\\_Financial\\_Dashboard](https://github.com/Umang1702/Credit_Card_Financial_Dashboard)



# Import data to SQL database

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



Data Output	Messages	Notifications
COPY 10108		
Query returned successfully in 82 msec.		

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

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



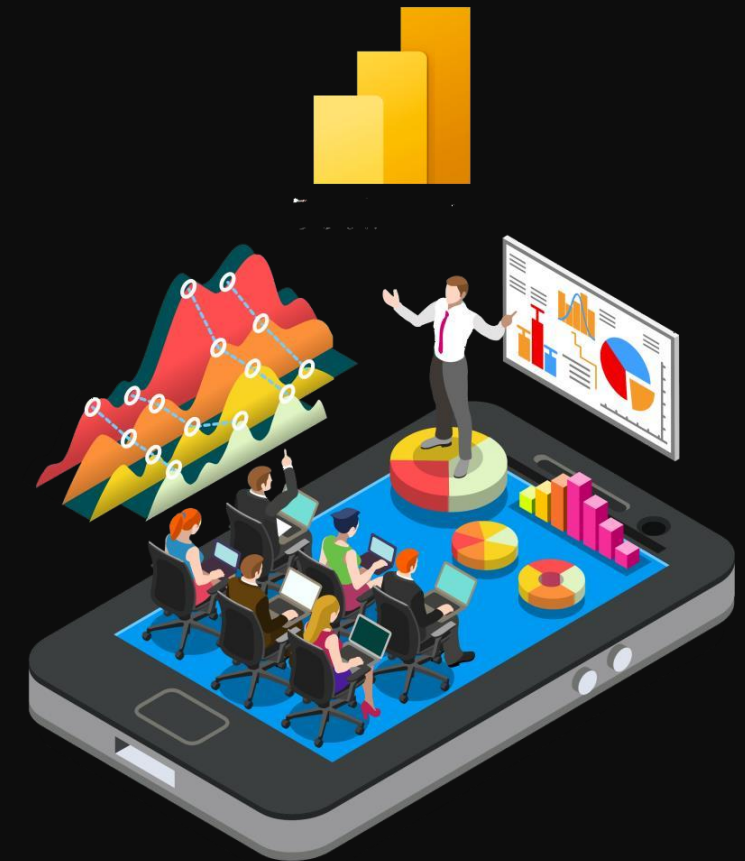
# Project Insights- Week 53 (31<sup>st</sup> Dec)

## 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 !**