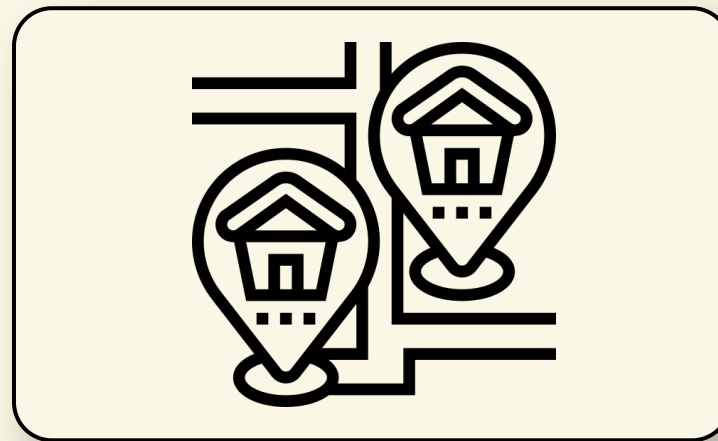
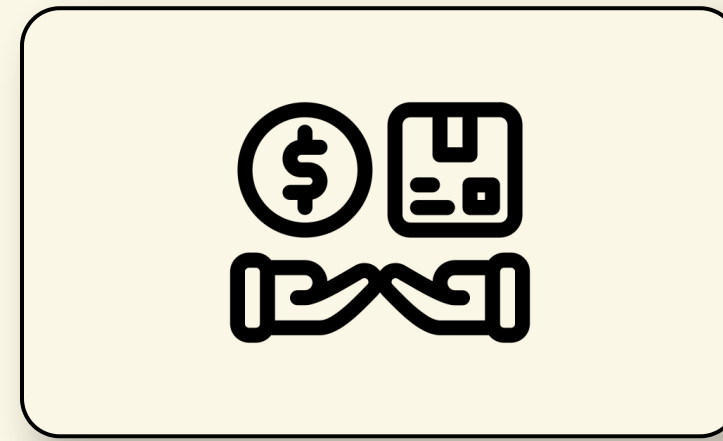




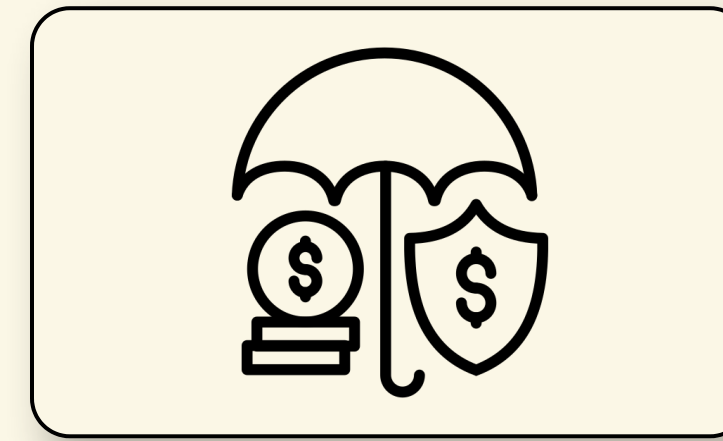
Bank Analysis Report



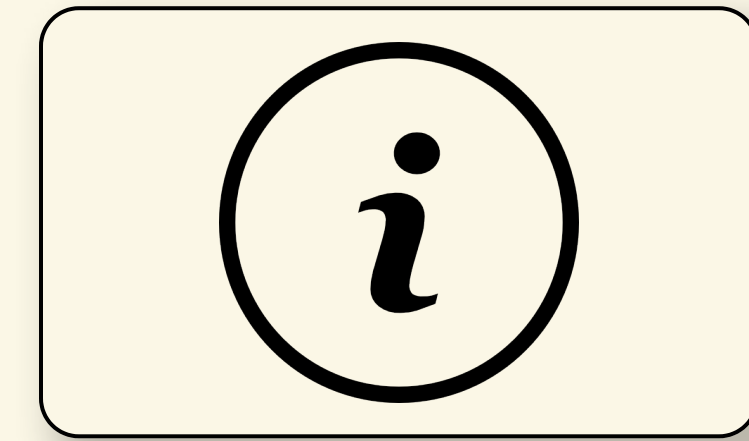
Branch Analysis **helps** us to analyze **performance** of a branch based on important key performing indicators.




Product analysis helps to analyze the performance and adoption of banking products. It helps identify top-selling products, trends, and opportunities for cross-selling or improvement based on metrics like transaction volume and claim frequency.



Insurance and claim analysis evaluates the efficiency and risk of insurance claims **processed** using metrics like claim frequency. It helps identify **high-risk** accounts, and assess the financial impact on the banking portfolio.



Info
Download **User Manual** and get to know the key information of this Report



Female

Year

2023

2024

2025

567.50M

42.63M

610.13M

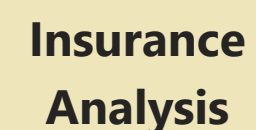
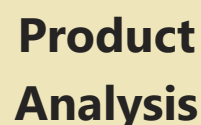
1.53M

6485

6485



Branch Analysis



Region	Average Account Balance	NetFlow	NetFlow LY	YoY NetFlow %	Average Account Balance	ClaimRatio ▼
⊕ East	1.29M	2.27M	1.38M	64.37%	1.29M	232.25%
⊕ South	1.77M	1.66M	-3.56M	-146.54%	1.77M	225.31%
⊕ North	1.45M	7.85M	11.03M	-28.86%	1.45M	216.78%
⊕ Central	1.59M	8.78M	0.66M	1234.15%	1.59M	195.33%
⊕ West	1.58M	22.08M	22.17M	-0.40%	1.58M	179.45%

ClaimStatus

- Open
- Rejected
- Settled

ClaimStatus	Count	Percentage
Open	8K	33.33%
Rejected	8K	33.33%
Settled	8K	33.33%

Branch	Transactions
Bengaluru Branch	643
Mumbai Branch	627
Hyderabad Branch	609
Bengaluru Branch	605
Kolkata Branch	604

Sector	Value
Retail	100%
SME	0.75K
Wealth	0.75K
Corporate	0.38K

6.2%

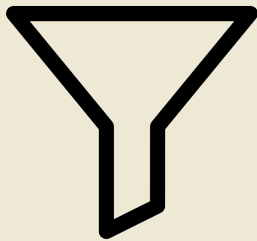
LY : Last Year

YOY : Year On Year



Product Analysis

Filter Pane



Gender

Female

Male

Year

2022

2023

2024

2025

Total Withdrawals

567.50M

Net Cash Flow

42.63M

Total Deposits

610.13M

Product Sold

12K

Total Transactions

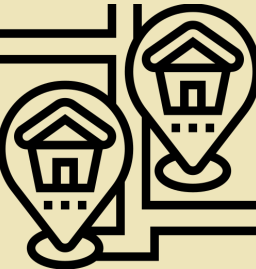
60K

Product Transactions
Average

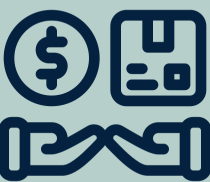
19.63K



Home



Branch
Analysis

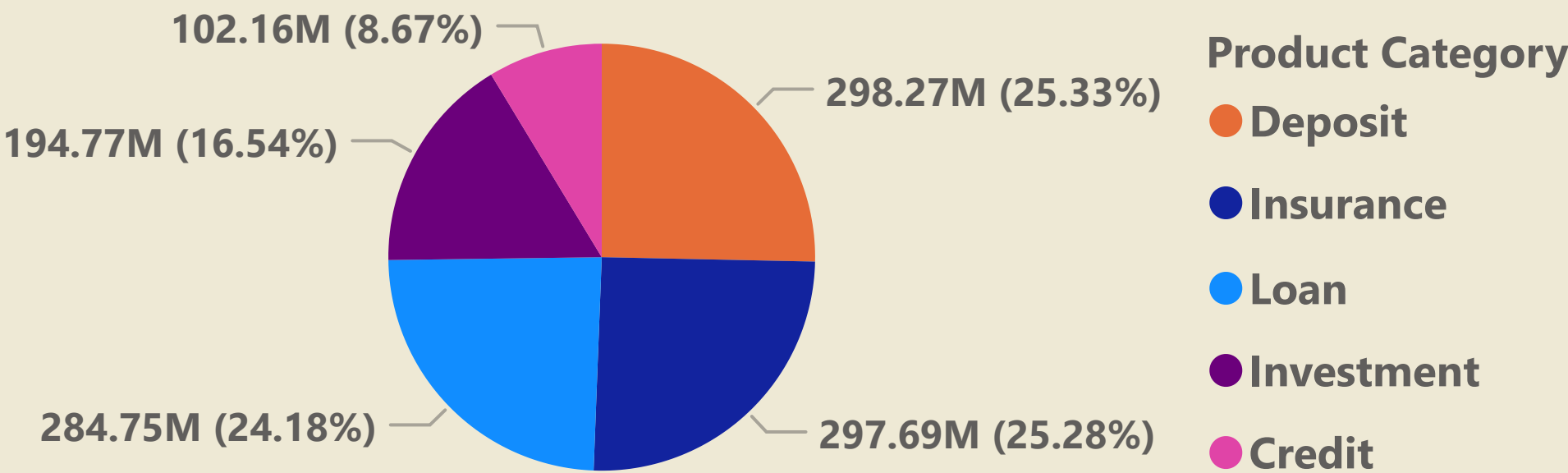


Product
Analysis



Insurance
Analysis

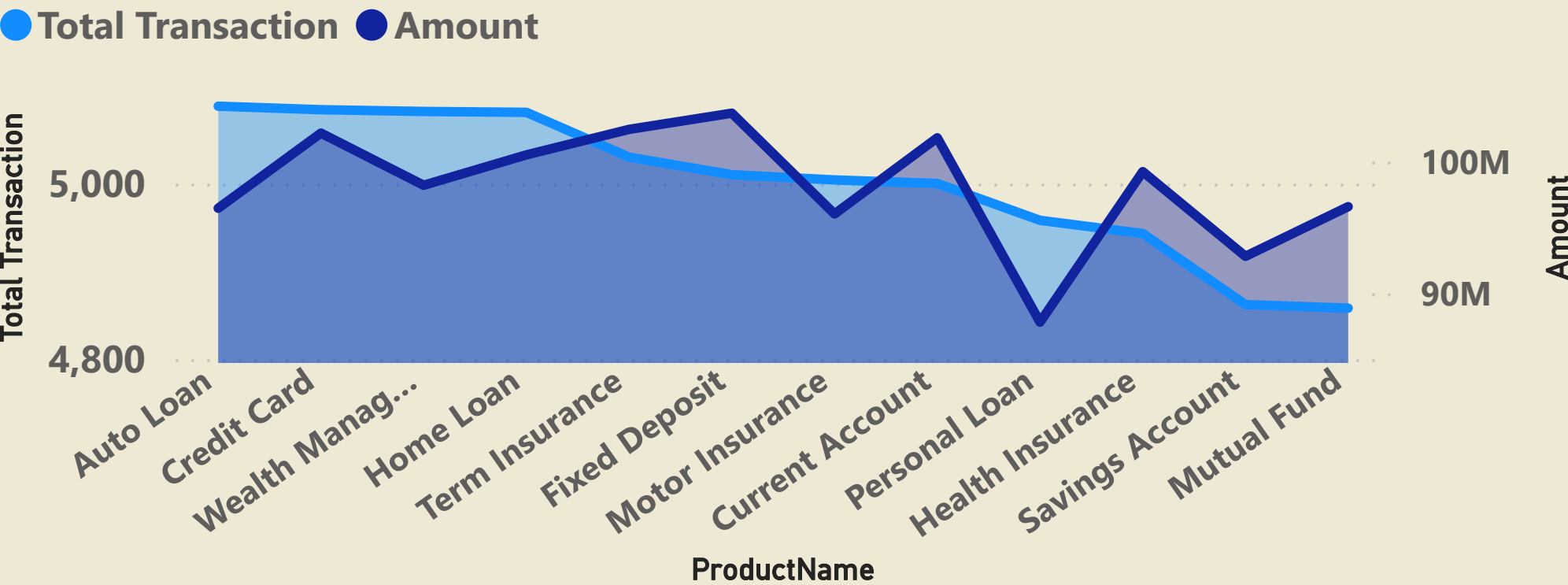
Product Category Revenue



Transaction Distriutibon by Product Category



Transaction & Amount Trends by Product



Top 5 Products by Revenue

ProductName	Amount
Home Loan	100.50M
Current Account	101.80M
Credit Card	102.16M
Term Insurance	102.44M
Fixed Deposit	103.67M
Total	510.57M

Top 5 Products by Transaction Volume

ProductName	Transactions
Credit Card	5084
Home Loan	5081
Term Insurance	5030
Fixed Deposit	5010
Current Account	5000
Total	25205

All Values are in INR

Total Premium

297.69M

Total Claims

123.78M

Claim Ratio

41.58%

Average Claim Value


5.00K

Claim Frequency per Account

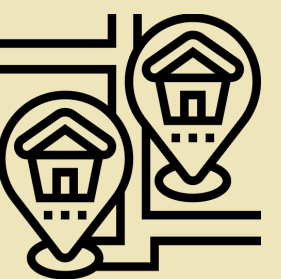
25%

High Risk Claim Exposure


793.75K




Home



Branch Analysis



Product Analysis

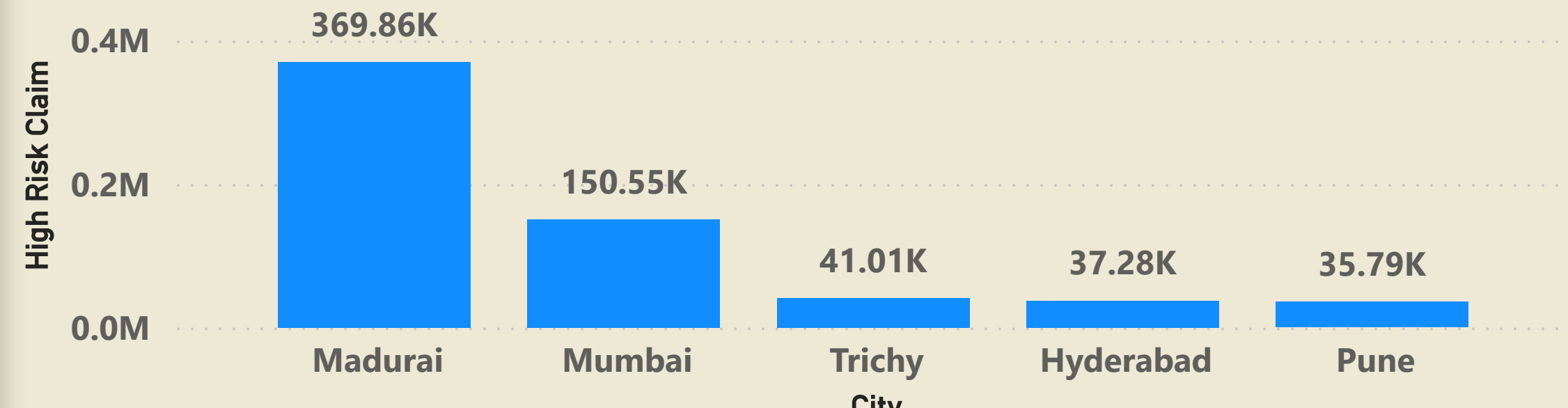


Insurance Analysis

Customer Claim Overview

CustomerName	TotalPremium	TotalClaims	ClaimRatio
Neha Rao	0.04M	1.52M	3784.84%
Aarav Das	0.02M	0.47M	3078.53%
Priya Shetty	0.06M	1.68M	2845.29%
Neha Shetty	0.04M	0.86M	2123.63%
Ritika Shetty	0.02M	0.29M	1457.22%
Sakshi Nair	0.04M	0.59M	1414.22%
Sakshi Shetty	0.03M	0.45M	1310.70%
Aditya Rao	0.08M	1.03M	1248.54%
Kavya Singh	0.08M	0.93M	1225.53%
Mohit Das	0.05M	0.53M	1055.05%
Karan Iyer	0.11M	0.98M	864.48%
Vivek Gupta	0.08M	0.68M	838.69%
Rohan Das	0.10M	0.59M	605.78%
Sanku Kumar	0.12M	0.73M	505.86%
Total	297.69M	123.78M	41.58%

Geographic High-Risk Analysis

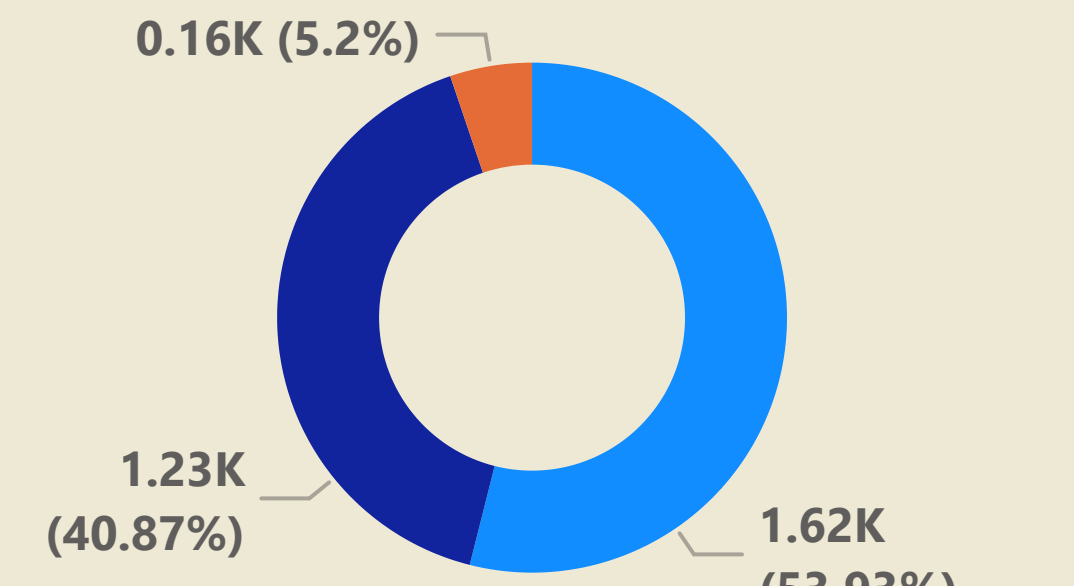


City	High Risk Claim
Madurai	369.86K
Mumbai	150.55K
Trichy City	41.01K
Hyderabad	37.28K
Pune	35.79K

Top High-Risk Customers

CustomerName	HighRiskClaimxpo
Shruti Rao	180,093.27
Vivek Shetty	4,495.79
Shruti Menon	3,327.17
Vivaan Mehta	1,076.73
Vivaan Singh	925.31
Total	189,918.27

Customer Status Distribution



ClaimStatus	Count	Percentage
Settled	1.62K	53.93%
Open	1.23K	40.87%
Rejected	0.16K	5.2%

All Values are in INR



Information Page



The Banking Report Dashboard is built using Power BI, leveraging a robust data model integrated with DAX (Data Analysis Expressions) for advanced calculations and real-time financial analytics. The dashboard utilizes a Import mode to ensure efficient data refresh and performance, depending on the data source size and update frequency. The data model is optimized with relationships between dimension tables (e.g., Date, Branch, Account Type) and fact tables (e.g., Transactions, Loan Balances, Customer Accounts) to support complex queries. Key technical features include:

- **Data Sources:** Connected to relational databases (e.g., SQL Server) or cloud-based systems (e.g., Azure SQL) containing transaction, loan, and customer account data, updated via scheduled or on-demand refreshes.
- **DAX Measures:** Custom measures like Total Deposits, Loan Interest Earned, and Account Balance YTD are implemented using functions such as CALCULATE, SUM, and DATESYTD for time intelligence.
- **Visuals:** Utilizes native Power BI visuals (e.g., bar charts, pie charts, tables) and field parameters for dynamic slicers (e.g., Time Intelligence: QTD, MTD, YTD).
- **Performance Optimization:** Incremental refresh is enabled for large datasets (> 1 GB), and query caching is utilized in Premium capacity to reduce load times. The model employs a star schema design to minimize redundancy.
- **Interactivity:** Bookmarks and page navigation are implemented using Power BI's navigation buttons, with dynamic titles driven by DAX measures (e.g., DynamicTitle) to reflect selected time periods.
- **Security:** Row-level security (RLS) can be configured to restrict data access based on user roles (e.g., branch managers, auditors), ensuring compliance with banking data governance policies.