

# CREDIT CARD

WEEKLY

STATUS REPORT



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# Project Objective

Developing a high-performance credit card weekly dashboard that delivers real-time, data-driven insights into key financial metrics and trends. Designed to empower stakeholders with actionable intelligence, this dashboard enhances monitoring, optimizes operations, and drives strategic decision-making for improved efficiency and profitability in credit card management.



# Download Data

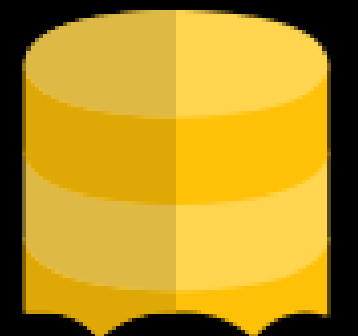


GitHub:

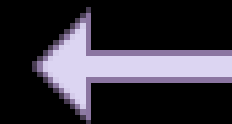
[https://github.com/Vikas-Vegyarapu/Credit\\_Card\\_Finance\\_Dashboard](https://github.com/Vikas-Vegyarapu/Credit_Card_Finance_Dashboard)

# Import data to SQL database

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



SQL



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

NOTE: Find all SQL queries & project data-

# 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

```
Revenue = 'public cc_detail'[annual_fees] + 'public cc_detail'[total_trans_amt] + 'public cc_detail'[interest_earned]
```

```
week_num2 = WEEKNUM('public cc_detail'[week_start_date])
```

```
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 (31st Dec)

WoW change:

- Revenue increased by 28.8%,
- Total Transaction Amt & Count increased by 24% & 19%,
- Customer count increased by 17% .

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%





# Key Metrics & Interactive Features

## Revenue Trends:

- Tracks total revenue growth, segmented by weekly, monthly, and YTD performance.

## Transaction Volume & Value:

- Displays the number of transactions and total transaction amount over time.

## Customer Segmentation:

- Breaks down revenue contribution by gender, age group, or income level.

## Card Performance:

- Highlights usage distribution among different credit card types (e.g., Blue & Silver cards contributing to 93% of transactions).

