**BANK LOAN REPORT QUERY DOCUMENT**

1. **BANK LOAN REPORT | SUMMARY**

**KPI’s:**

**Total Loan Applications**

select count(id) Total\_Loan\_Applications

from [Bank Loan DB]..bank\_loan\_data



**MTD Loan Applications**

select count(id) MTD\_Total\_Loan\_Applications

from [Bank Loan DB]..bank\_loan\_data

where month(issue\_date) = 12 and year(issue\_date) = 2021



**PMTD Loan Applications**  
select count(id) PMTD\_Total\_Loan\_Applications

from [Bank Loan DB]..bank\_loan\_data

where month(issue\_date) = 11 and year(issue\_date) = 2021



**Total Funded Amount**

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

FROM bank\_loan\_data



**MTD Total Funded Amount**

select sum(loan\_amount) as MTD\_Total\_Funded\_Amount

from [Bank Loan DB]..bank\_loan\_data

where month(issue\_date) = 12 and year(issue\_date) = 2021



**PMTD Total Funded Amount**

select sum(loan\_amount) as PMTD\_Total\_Funded\_Amount

from [Bank Loan DB]..bank\_loan\_data

where month(issue\_date) = 11 and year(issue\_date) = 2021



**Total Amount Received**

select sum(total\_payment) as Total\_Amount\_Received

from [Bank Loan DB]..bank\_loan\_data



**MTD Total Amount Received**

select sum(total\_payment) as MTD\_Total\_Amount\_Received

from [Bank Loan DB]..bank\_loan\_data

where month(issue\_date) = 12 and year(issue\_date) = 2021



**PMTD Total Amount Received**

select sum(total\_payment) as PMTD\_Total\_Amount\_Received

from [Bank Loan DB]..bank\_loan\_data

where month(issue\_date) = 11 and year(issue\_date) = 2021



**Average Interest Rate**

select round(avg(int\_rate),4)\*100 as Avg\_Interst\_Rate

from [Bank Loan DB]..bank\_loan\_data



**MTD Average Interest**

select round(avg(int\_rate),4)\*100 as MTD\_Avg\_Interst\_Rate

from [Bank Loan DB]..bank\_loan\_data

where month(issue\_date) = 12 and year(issue\_date) = 2021



**PMTD Average Interest**

select round(avg(int\_rate),4)\*100 as MTD\_Avg\_Interst\_Rate

from [Bank Loan DB]..bank\_loan\_data

where month(issue\_date) = 11 and year(issue\_date) = 2021



**Avg DTI**

select round(avg(dti),4)\*100 as Avg\_DTI

from [Bank Loan DB]..bank\_loan\_data



**MTD Avg DTI**

select round(avg(dti),4)\*100 as MTD\_Avg\_DTI

from [Bank Loan DB]..bank\_loan\_data

where month(issue\_date) =12 and year(issue\_date) =2021



**PMTD Avg DTI**

select round(avg(dti),4)\*100 as PMTD\_Avg\_DTI

from [Bank Loan DB]..bank\_loan\_data

where month(issue\_date) =11 and year(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 DB]..bank\_loan\_data

****

**Good Loan Applications**

select count(id) as Good\_Loan\_Applications

from [Bank Loan DB]..bank\_loan\_data

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 DB]..bank\_loan\_data

where loan\_status = 'Fully Paid' or loan\_status ='Current'

****

**Good Loan Amount Received**

select SUM(total\_payment) as Good\_Loan\_Recived\_amount

from [Bank Loan DB]..bank\_loan\_data

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 DB]..bank\_loan\_data

****

**Bad Loan Applications**

select count(id) as Bad\_Loan\_Applications

from [Bank Loan DB]..bank\_loan\_data

where loan\_status = 'Charged Off'

****

**Bad Loan Funded Amount**

select sum(loan\_amount) as Bad\_Loan\_amount\_Funded

from [Bank Loan DB]..bank\_loan\_data

where loan\_status = 'Charged Off'

****

**Bad Loan Amount Received**

select sum(total\_payment) as Bad\_Loan\_amount\_Recived

from [Bank Loan DB]..bank\_loan\_data

where loan\_status = 'Charged Off'

****

**LOAN STATUS**

select loan\_status,

COUNT(id) AS Total\_Loan\_applications,

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 DB]..bank\_loan\_data

group by loan\_status****

SELECT

loan\_status,

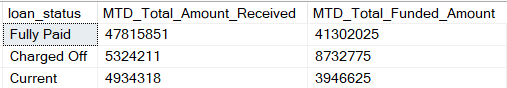
SUM(total\_payment) AS MTD\_Total\_Amount\_Received,

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

from [Bank Loan DB]..bank\_loan\_data

WHERE MONTH(issue\_date) = 12

GROUP BY loan\_status

****

1. **BANK LOAN REPORT | OVERVIEW**

**MONTH**

select month(issue\_date) as Month\_Number,

datename(month, issue\_date) as Month\_Name,

count(id) as Total\_Loan\_Application,

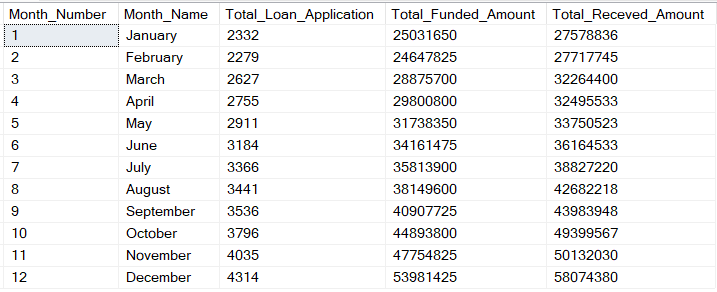
sum(Loan\_amount) as Total\_Funded\_Amount,

sum(total\_payment) as Total\_Receved\_Amount

from [Bank Loan DB]..bank\_loan\_data

group by month(issue\_date),datename(month, issue\_date)

order by month(issue\_date)



**STATE**

select address\_state,

count(id) as Total\_Loan\_Application,

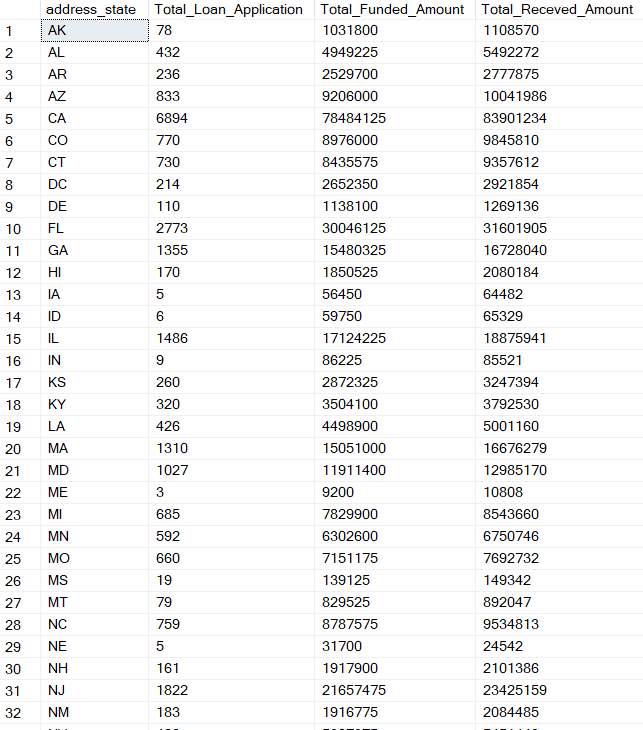
sum(Loan\_amount) as Total\_Funded\_Amount,

sum(total\_payment) as Total\_Receved\_Amount

from [Bank Loan DB]..bank\_loan\_data

group by address\_state

order by address\_state



**TERM**

select term,

count(id) as Total\_Loan\_Application,

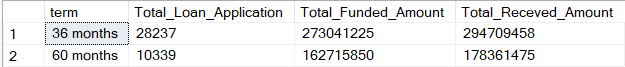
sum(Loan\_amount) as Total\_Funded\_Amount,

sum(total\_payment) as Total\_Receved\_Amount

from [Bank Loan DB]..bank\_loan\_data

group by term

order by term

****

**EMPLOYEE LENGTH**

select emp\_length,

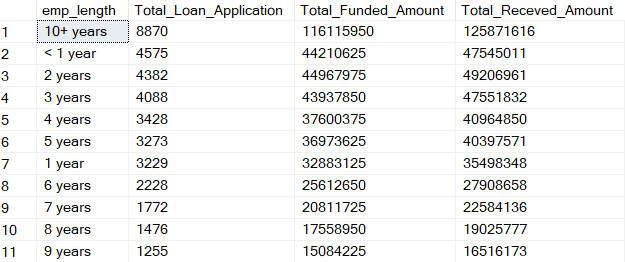
count(id) as Total\_Loan\_Application,

sum(Loan\_amount) as Total\_Funded\_Amount,

sum(total\_payment) as Total\_Receved\_Amount

from [Bank Loan DB]..bank\_loan\_data

group by emp\_length

order by count(id) desc****

**PURPOSE**

select purpose AS Purpose,

count(id) as Total\_Loan\_Application,

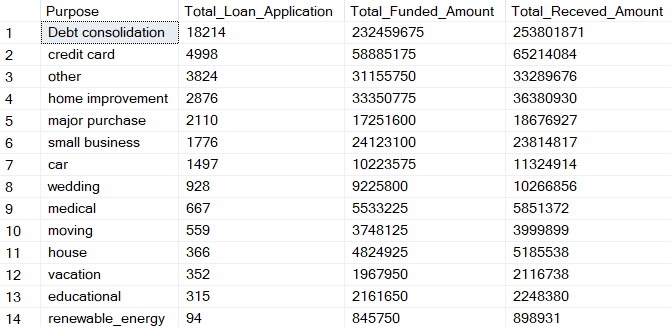
sum(Loan\_amount) as Total\_Funded\_Amount,

sum(total\_payment) as Total\_Receved\_Amount

from [Bank Loan DB]..bank\_loan\_data

group by purpose

order by count(id) desc

****

**HOME OWNERSHIP**

select home\_ownership,

count(id) as Total\_Loan\_Application,

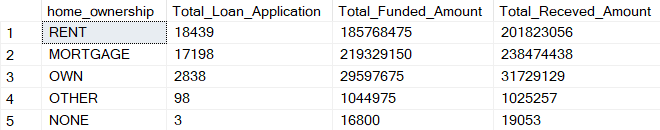
sum(Loan\_amount) as Total\_Funded\_Amount,

sum(total\_payment) as Total\_Receved\_Amount

from [Bank Loan DB]..bank\_loan\_data

group by home\_ownership

order by count(id) desc

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*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 home\_ownership,*

*count(id) as Total\_Loan\_Application,*

*sum(Loan\_amount) as Total\_Funded\_Amount,*

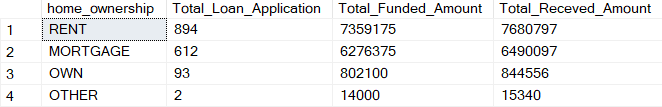
*sum(total\_payment) as Total\_Receved\_Amount*

*from [Bank Loan DB]..bank\_loan\_data*

*where grade = 'A' and address\_state = 'CA'*

*group by home\_ownership*

*order by count(id) desc*

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