

# **CREDIT CARD WEEKLY STATUS REPORT**

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# 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.



# Import data to SQL database

- Prepare csv file
- Create tables in SQL
- Import csv file into SQL

# DAX Queries

- AgeGroup = SWITCH(
  - TRUE(),
  - 'ccdb cust\_detail'[customer\_age] < 30, "20-30",
  - 'ccdb cust\_detail'[customer\_age] >= 30 && 'ccdb cust\_detail'[customer\_age] < 40, "30-40",
  - 'ccdb cust\_detail'[customer\_age] >= 40 && 'ccdb cust\_detail'[customer\_age] < 50, "40-50",
  - 'ccdb cust\_detail'[customer\_age] >= 50 && 'ccdb cust\_detail'[customer\_age] < 60, "50-60",
  - 'ccdb cust\_detail'[customer\_age] >= 60, "60+",
  - "unknown"
  - )
- IncomeGroup = SWITCH(
  - TRUE(),
  - 'ccdb cust\_detail'[income] < 35000, "Low",
  - 'ccdb cust\_detail'[income] >= 35000 && 'ccdb cust\_detail'[income] < 70000, "Med",
  - 'ccdb cust\_detail'[income] >= 70000, "High",
  - "unknown"
  - )

# DAX Queries

- `Week_num2 = WEEKNUM('ccdb cc_detail'[week_start_date])`
- `Revenue = 'ccdb cc_detail'[annual_fees]+'ccdb cc_detail'[total_trans+amt]+'ccdb cc_detail'[interest_earned]`
- `Current_week_Revenue = CALCULATE(`
- `SUM('ccdb cc_detail'[Revenue]),`
- `FILTER(`
- `ALL('ccdb cc_detail'),`
- `'ccdb cc_detail'[week_num2] = MAX('ccdb cc_detail'[week_num2])))`
- `Previous_week_Revenue = CALCULATE(`
- `SUM('ccdb cc_detail'[Revenue]),`
- `FILTER(`
- `ALL('ccdb cc_detail'),`
- `'ccdb cc_detail'[week_num2] = MAX('ccdb 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 28.9% & 2.5%
- Customer count increased by 2.6%
- **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%



# 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.



## Profile and Project Links

- Email: aashnadangi10@gmail.com
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- GitHub :[https://github.com/aashnadangi/Credit\\_Card\\_Financial\\_Report1](https://github.com/aashnadangi/Credit_Card_Financial_Report1)