

Credit Card Financial Dashboard

Credit Card Transaction & Customer Insights using Power BI

Project Objective

The objective of this project is to build a comprehensive, interactive weekly Credit Card Dashboard that provides real-time insights into customer behavior, revenue trends, transaction patterns, and card performance. This helps stakeholders monitor performance, identify trends, and make data-driven decisions.

Data Import Process (SQL + Power BI Integration)

1. Prepare & Clean Data
2. Create SQL Tables
3. Import CSV into SQL Database
4. Connect SQL to Power BI

WOW Changes

1. Revenue increased by 28.8%
2. Total Transaction Amount & Count increased significantly
3. Customer base improved noticeably

YTD Overview

- Total Revenue: 57M
- Total Interest Earned: 8M
- Total Transaction Amount: 46M
- Male vs Female Revenue: 31M vs 26M
- Blue & Silver cards generate 93% of transactions
- TX, NY, CA contribute 68%
- Activation Rate: 57.5%
- Delinquency Rate: 6.06%

Dashboard Overview

1. Customer Insights Dashboard

2. Transaction Insights Dashboard

Topics Covered

- Power BI basics
- Connecting Power BI to SQL
- Visual creation
- Power Query
- DAX
- Dashboard design
- Insight extraction
- Exporting & sharing

Tools Used

Power BI, SQL, Power Query, DAX, Excel

Conclusion

This project demonstrates end-to-end data analytics workflow with SQL + Power BI, delivering insights into customer behavior and credit card financial performance.