

A photograph of two women in a room. In the foreground, a woman with short blonde hair is smiling and looking towards the right. Behind her, a woman with dark curly hair is also smiling. The wall behind them is covered with several small, framed photographs. The image is partially obscured by a purple and pink gradient overlay at the bottom.

Credit Card Financial Dashboard

AMIT MISHRA

Project Objective

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.

DAX Queries

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

DAX Queries

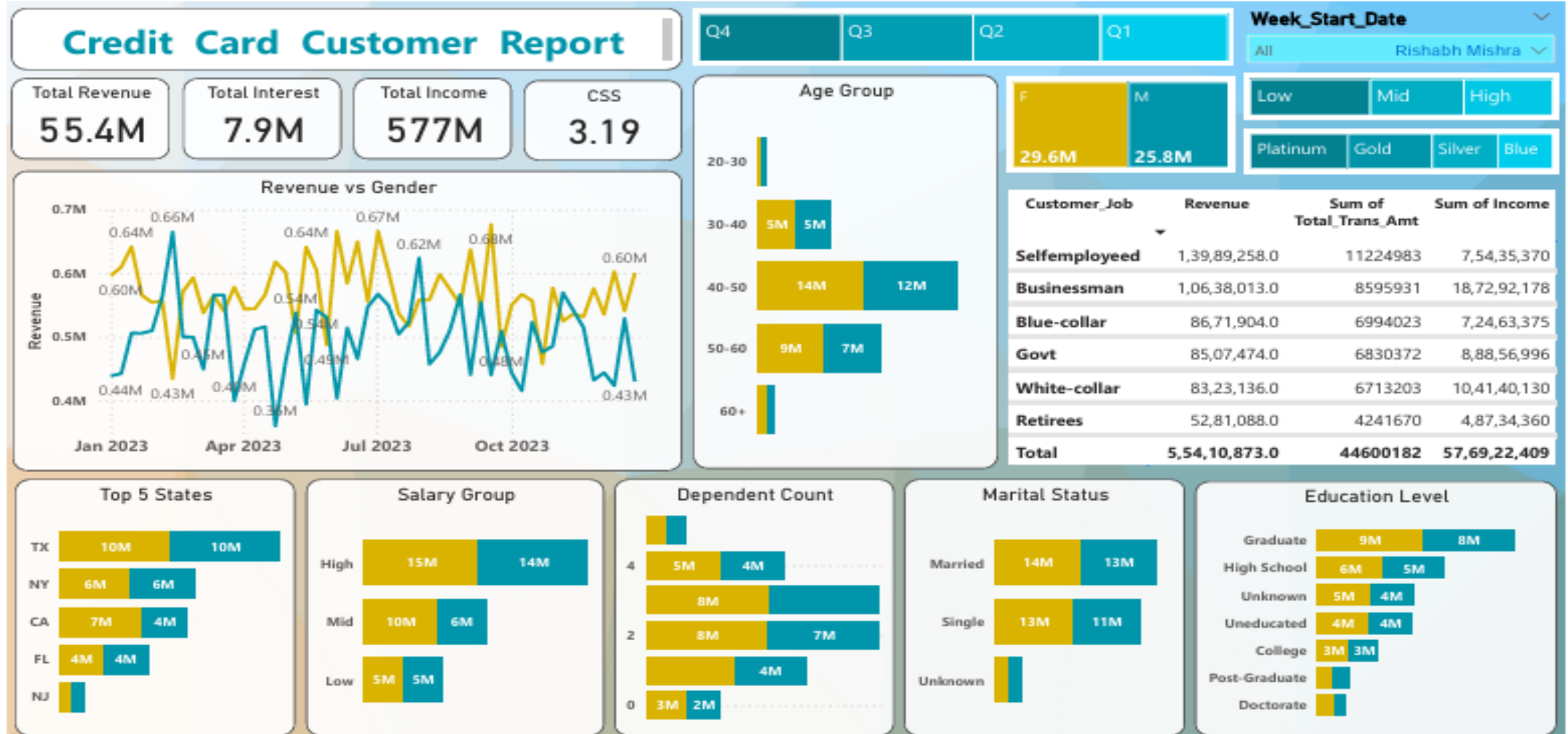
```
week_num2 = WEEKNUM('public cc_detail'[week_start_date])

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

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))
```


Credit Card Customer Report



Credit Card Transaction Report

Credit Card Transaction Report

Total Revenue	Total Interest	Transaction Amount	Transaction Count
55.4M	7.9M	45M	657K

Card_Category	Revenue	Sum of Interest_Earned	Sum of Annual_Fees
Blue	4,62,34,849.0	65,08,880.0	26,89,925
Silver	55,86,343.0	8,12,092.0	1,87,505
Gold	24,54,073.0	3,73,785.0	56,210
Platinum	11,35,608.0	1,61,629.0	20,665
Total	5,54,10,873.0	78,56,386.0	29,54,305

Q4 Q3 Q2 Q1

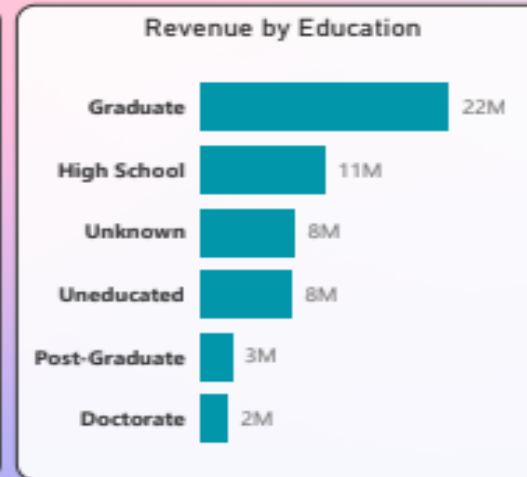
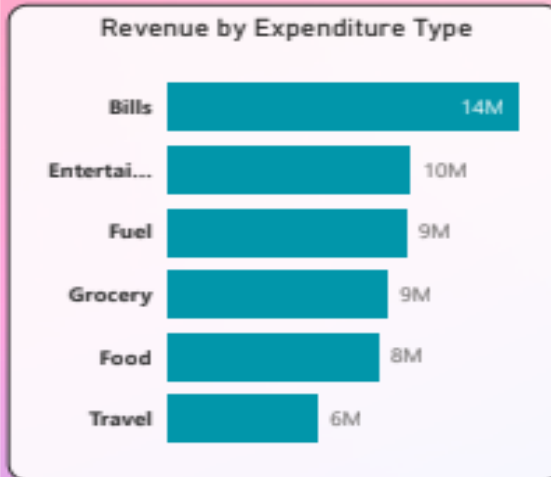
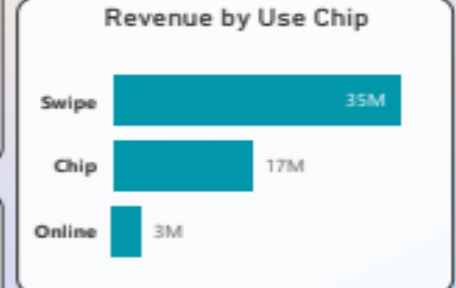
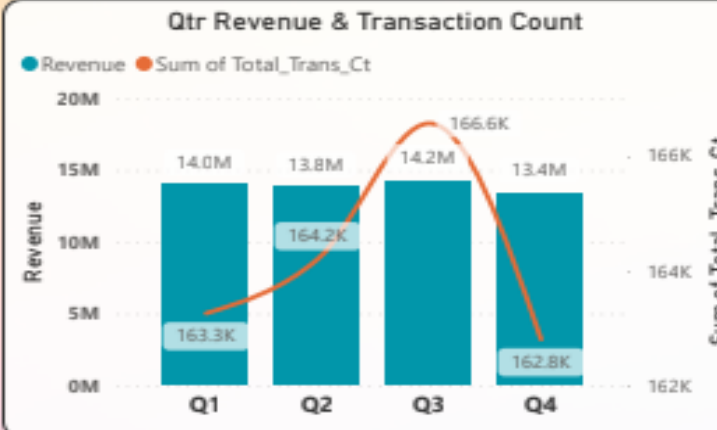
Week_Start_Date

All Rishabh Mishra

M F

Low Mid High

Platinum Gold Silver Blue



Project Insights- Week 53 (31st Dec)

WOW CHANGE:

Week of Week change:

- Revenue increased by 28.8%,
- Total Transaction Amt & Count increased by xx% & xx%
- Customer count increased by xx%

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%

A woman with dark, curly hair and glasses is smiling and looking off to the side. The background is a blurred office or indoor setting with windows and some framed pictures on the wall.

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THANK YOU!
