CREDIT CARD

WEEKLY STATUS REPORT

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.

Rishabh Mishra

Import data to SQL database

1. Prepare csv file

2. Create tables in SQL

3. Import csv file into SQL

Data Output   Messages   Notifications

COPY 10108

Query returned successfully in 82 msec.

NOTE: Find all SQL queries & project data- github.com/rishabhnmishra/Credit_Card_Financial_Dash

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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

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_Reveneue = CALCULATE(
SUM('public cc_detail'[Revenue]),
FILTER(
    ALL('public cc_detail'),
    'public cc_detail'[week_num2] = MAX('public cc_detail'[week_num2])))

Previous_week_Reveneue = 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 De

WoW 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%

Note: You can add mo

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Add to resume

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.

Rishabh Mishra