Credit Card Financial Dashboard

Overview

There will be two dashboards one for credit card customer report while the other one is credit card transaction report. This is a weekly report. There will be report based on Gender, Income, Types of Cards, We will also use tree map in this project. The main KPI will be in cards. We will also develop table of Revenue, Sum of interest and sum of annual fees based on different cards. By watching the Digital Dashboard the stakeholder will get a clear idea about the weekly performance of the cards.

Objectives

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.

Technology Used

Postgres SQL:
- ➔ Import data to SQL database
- ➔ Create tables in SQL
- ➔ Increment the values of next week
- ➔ Send the data to Power BI

Power BI:
- ➔ Made Graphs
- ➔ Made Charts
- ➔ Made a Digital Dashboard

Challenged Encountered

- ➔ Unstructured Data: The initial dataset lacked organization, particularly with income and age variables, necessitating grouping for effective analysis.
- ➔ Utilization of Switch Function: Used the switch function to handle multiple conditions efficiently, aiding in the categorization of income and age groups.
- ➔ Income and Age Grouping: Implemented grouping techniques to organize data into low, middle, and high-income brackets, as well as age categories, facilitating clearer insights.
- ➔ Revenue Calculation: Created a revenue table within the Credit Card (CC) dataset, enabling visualization of revenue distribution based on card type for enhanced analysis.

➔ Week Sorting: Sorted the data by week, ensuring chronological order for accurate trend analysis and comparison.
➔ Creation of New Columns: Introduced new columns to accommodate additional data points, enhancing the depth of analysis and facilitating more comprehensive insights.
➔ Development of New Measures: Constructed new measures to calculate total card counts and total house counts, providing key metrics for performance evaluation and strategic decision-making.
➔ Data Template Updates: Acquired proficiency in updating the analysis template with new weekly data, streamlining the process for ongoing analysis and reporting.

These challenges were encountered and successfully addressed during the Credit card data analysis project, contributing to the refinement and effectiveness of the analytical process.

Project Insights

Customer and Card report:
➔ Revenue increased by 28.8%.
➔ Total Loan took by 1310 peoples.
➔ Average Satisfactory Score 3.19.
➔ Total car owners 4138.
➔ 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%