

Credit card transaction weekly report

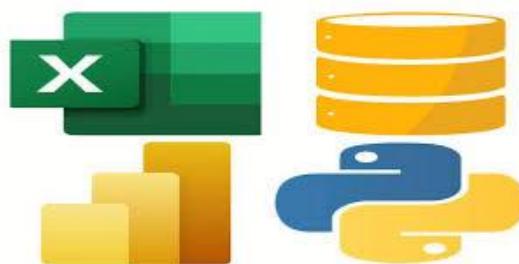


Content in this projects

- 1. Project objective**
- 2. Data from SQL**
- 3. Data processing & DAX**
- 4. Dashboard & insights**

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

```
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_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)
```

Project Insights- Week 53 (31st Dec)

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 more insights

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.