

# **Credit card transaction weekly report**

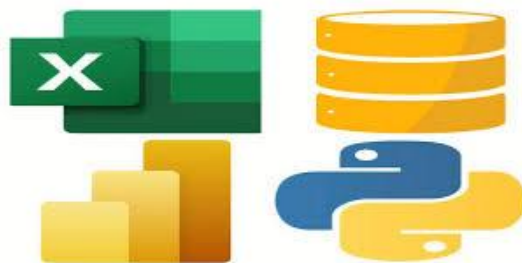


# **Content in this projects**

- 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.**