CREDIT CARD

WEEKLY STATUS REPORT

Content in this tutorial video

1. Project objective

2. Data from SQL

3. Dataprocessing &DAX

   Dashboard & insights
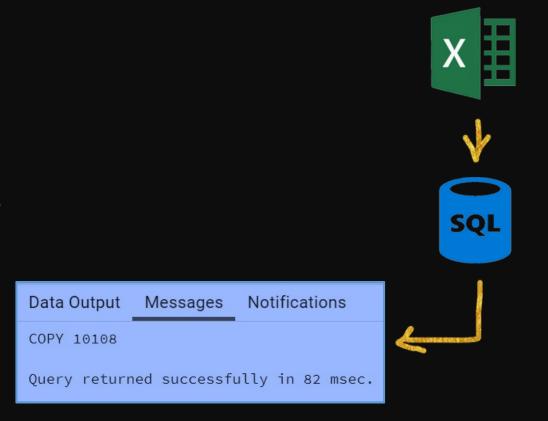
4. Export&share project

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.

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.		

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 Dec)

WoW change:

- Revenueincreased by 28.8%,
- TotalTransaction Amt&Count increased by xx% & xx%
- Customercount increased by xx%

Overview YTD:

- Overallrevenue 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

Add to resume

Creditcardfinancialdashboard using Power BI:

- Developed aninteractive 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.

Download Data

GitHub:

https://github.com/bhattviv

LinkedIn   linkedin.com/in/vivekbhatt-data