



# POWER BI PROJECT



Credit Card Weekly Status Report



# CONTENTS

**Project Objective**

**Data From SQL**

**Data Processing & DAX**

**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.**



# **Step 1: Import data to SQL database**

( Using SQL Server Management Studio)

- 1. Prepare csv file**
- 2. Create tables in SQL**
- 3. import csv file into SQL**

# 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)

- 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%

# Conclusion

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.

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