

Credit Card Sales Analysis

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Contents

- Project Objective
- Project Description & steps
- Data from SQL
- Dax Queries
- Dashboard & Insights

Project Objective

Design a detailed weekly credit card dashboard that delivers real-time insights into critical performance metrics and trends, empowering stakeholders to effectively monitor and assess credit card operations.

Data From SQL

- 1. Convert the Excel file to CSV format.
- 2. Create tables in PostgreSQL with appropriate data types and constraints.
- 3. Load the CSV file into PostgreSQL using the ``COPY`` command or by importing via the import/export option.
- 4. You can import the CSV file directly using the import/export option or by employing the ``COPY`` command to streamline the data insertion process.

Project Description & Steps

- **Data Integration from SQL:** Data Sourcing from SQL: This dashboard pulls data directly from the SQL database, with automatic updates to ensure it reflects the most current information for accurate, timely decision-making.
- **Data Analysis with DAX:** Advanced data processing and DAX queries are used to calculate weekly metrics and trends. Custom columns and calculations simplify analysis, offering a detailed view of credit card performance.
- **Creating Dashboard:**
 1. **Credit Card Activity Report:** Explore transaction insights with interactive KPIs and visualizations, highlighting revenue by income, marital status, dependents, education level, and weekly trends.
 2. **Credit Card Customer Report:** Delve into customer-centric analytics, featuring revenue by gender, job role, education, expenditure type, customer acquisition cost, quarterly revenue, and total transaction amounts.
- This project highlights advanced data analytics with a user-friendly design, enabling stakeholders to make confident, data-driven decisions. Transform credit card operations through powerful insights.

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_Revenueue = CALCULATE(

SUM('public cc_detail' [Revenue]),

FILTER(

ALL('public cc_detail'),

public cc_detail[week_num2] = MAX('public cc_detail'[week_num2]))))

Previous_week_Revenueue = 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 (31 dec)

- WoW change:
- Revenue increased by 28.8%,
- Overall Income: 588M
- 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%



THANK YOU