Real-Time Credit Card KPI Dashboard

Problem Statement:

Financial institutions and stakeholders often face challenges in tracking and understanding the performance of credit card operations on a regular basis. Traditional reporting methods are time-consuming, lack real-time insights, and often fail to provide a comprehensive view of key metrics such as transaction volume, delinquency rates, customer behavior, and revenue trends. This lack of timely and interactive reporting hinders effective decision-making and operational efficiency.

There is a need for a dynamic and visually interactive solution that can deliver weekly insights into credit card performance, enabling stakeholders to make data-driven decisions quickly. The absence of such a centralized and real-time dashboard limits the organization's ability to monitor trends, identify anomalies, and respond to critical changes in customer activity or financial performance.

Project Objective:

To design and develop a comprehensive weekly credit card dashboard that delivers real-time insights into key performance metrics and emerging trends, empowering stakeholders to effectively monitor, analyze, and optimize credit card operations.

Project Insights:

1) Revenue increased 28.8% in Last Week .
2) Overall revenue is 57M .
3) Total interest is 8M.
4) Total Income 588 M.
5) Total transaction amount is 46M.
6) Male customers are contributing more in revenue 31M, female 26M.
7) Blue & Silver credit card are contributing to 93% of overal ltransactions
8) TX, NY & CA is contributing to 68%Overall

Credit Card Transaction Report

Count	Revanue	Amount	Total Interest
667K	57M	46M	8M

card_category ▲	Sum of Revenue	Sum of total_trans_amt	Sum of interest_earned
Blue	47188612	37840749	6,614,172.62
Gold	2533682	2091362	384,755.16
Platinum	1135608	953314	161,629.05
Silver	5659109	4647596	821,922.98
Total	56517011	45533021	7,982,479.81

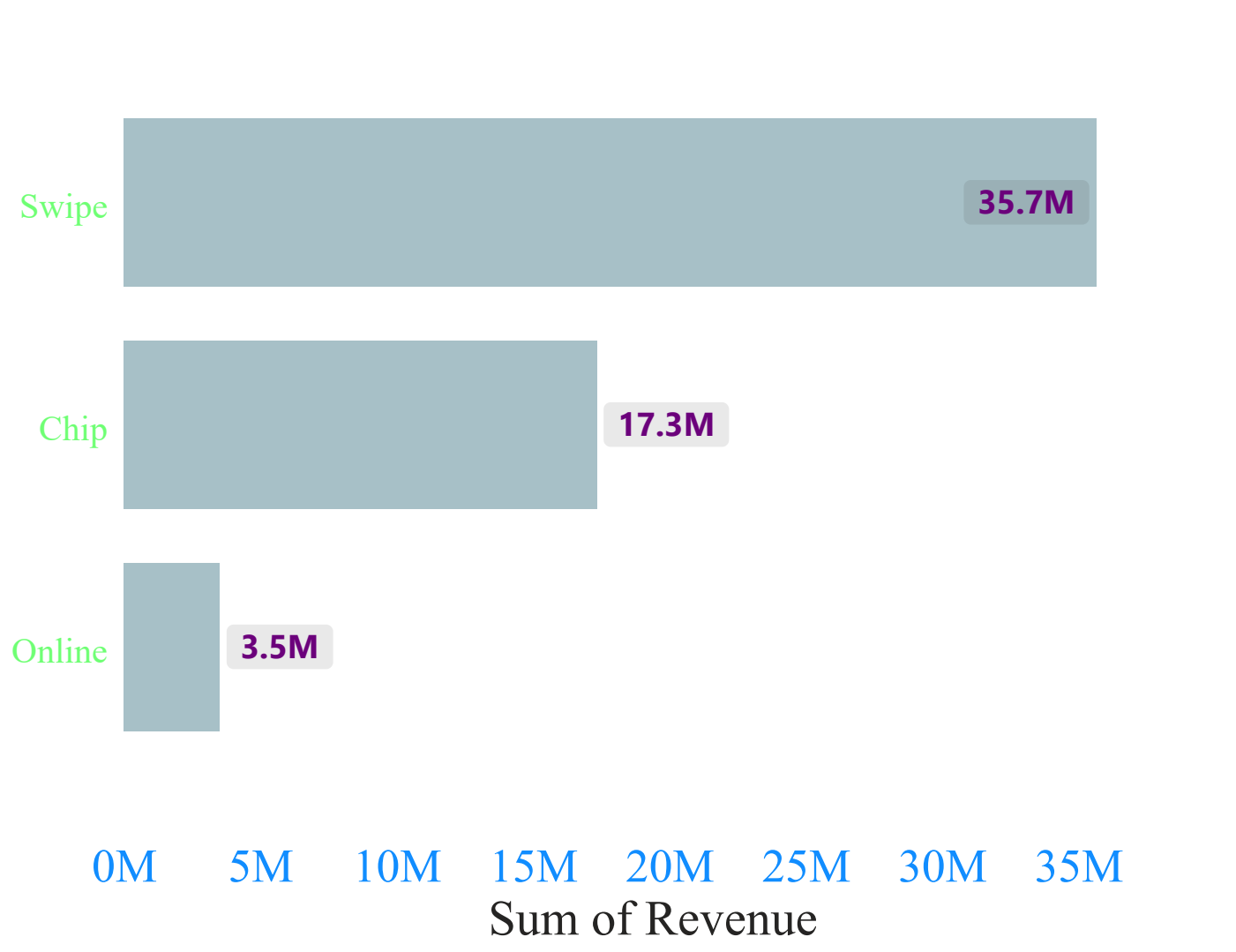**Average of client_num by qtr**

Q4 Q3 Q2 Q1

Average of client_num by card_category
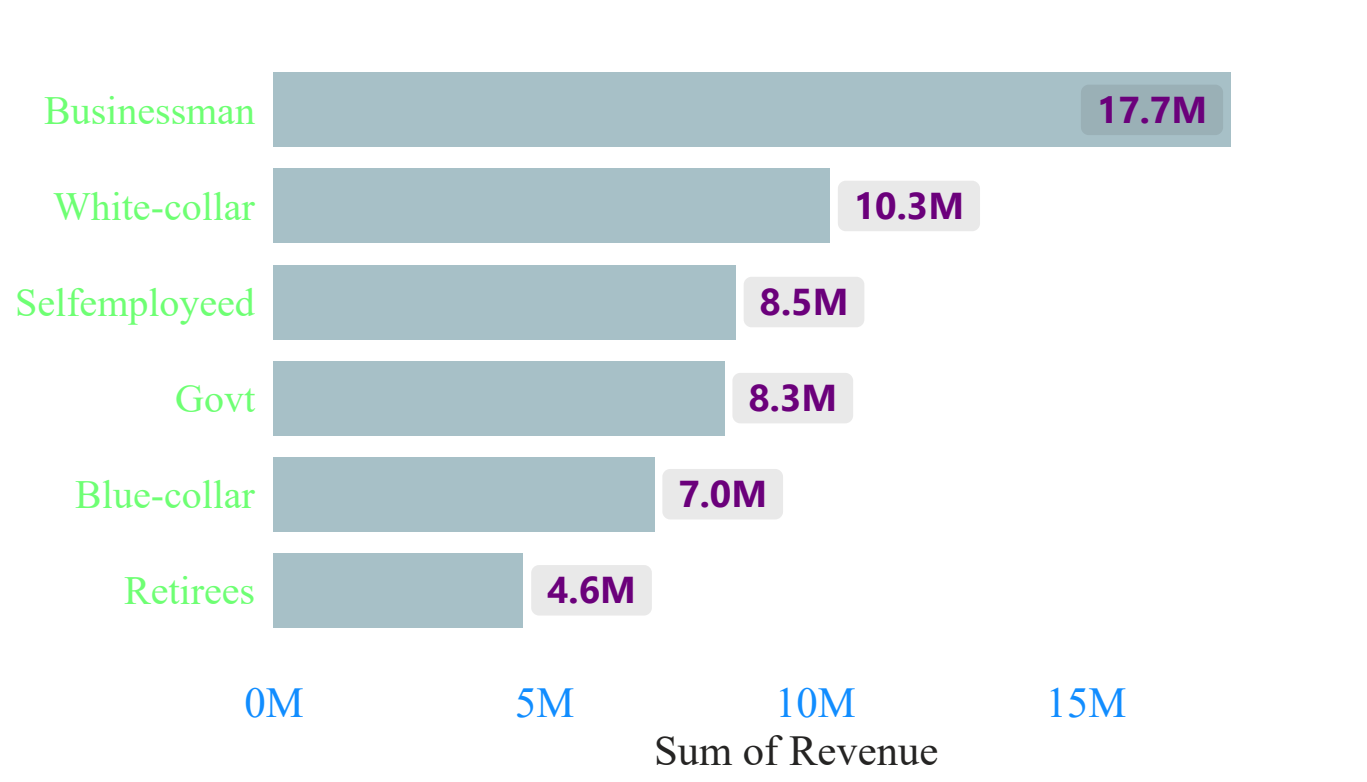
Gold Silver Blue Platinum

week_start_date

All

Average of client_num by gender
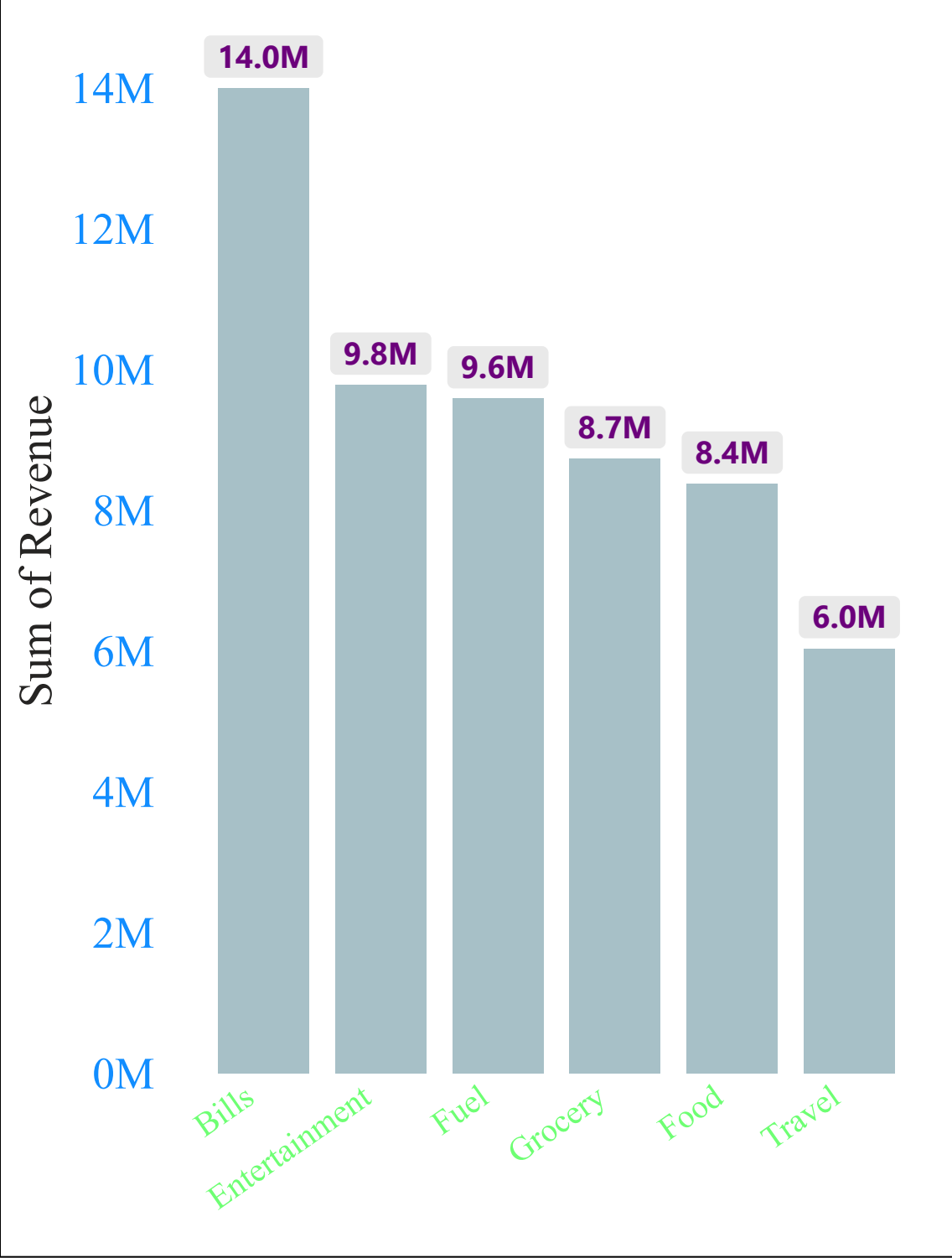
F M

Sum of Revenue by use_chip

- Swipe: 35.7M
- Chip: 17.3M
- Online: 3.5M

Sum of Revenue (0M 5M 10M 15M 20M 25M 30M 35M)

delinquent_acc	Blue-collar	Businessman	Govt	Retirees	Selfemployeed	White-collar	Total
0	14.75%	17.81%	14.00%	9.16%	23.87%	14.35%	93.94%
1	0.85%	0.99%	1.10%	0.61%	1.66%	0.85%	6.06%
Total	15.60%	18.80%	15.10%	9.77%	25.53%	15.19%	100.00%

Revenue by customer_job

- Businessman: 17.7M
- White-collar: 10.3M
- Selfemployeed: 8.5M
- Govt: 8.3M
- Blue-collar: 7.0M
- Retirees: 4.6M

Sum of Revenue (0M 5M 10M 15M)

Revenue by exp_type

- Bills: 14.0M
- Entertainment: 9.8M
- Fuel: 9.6M
- Grocery: 8.7M
- Food: 8.4M
- Travel: 6.0M

Revenue by education_level

- Graduate: 22.8M
- High School: 11.4M
- Unknown: 8.7M
- Uneducated: 8.3M
- Post-Graduate: 2.8M
- Doctorate: 2.5M
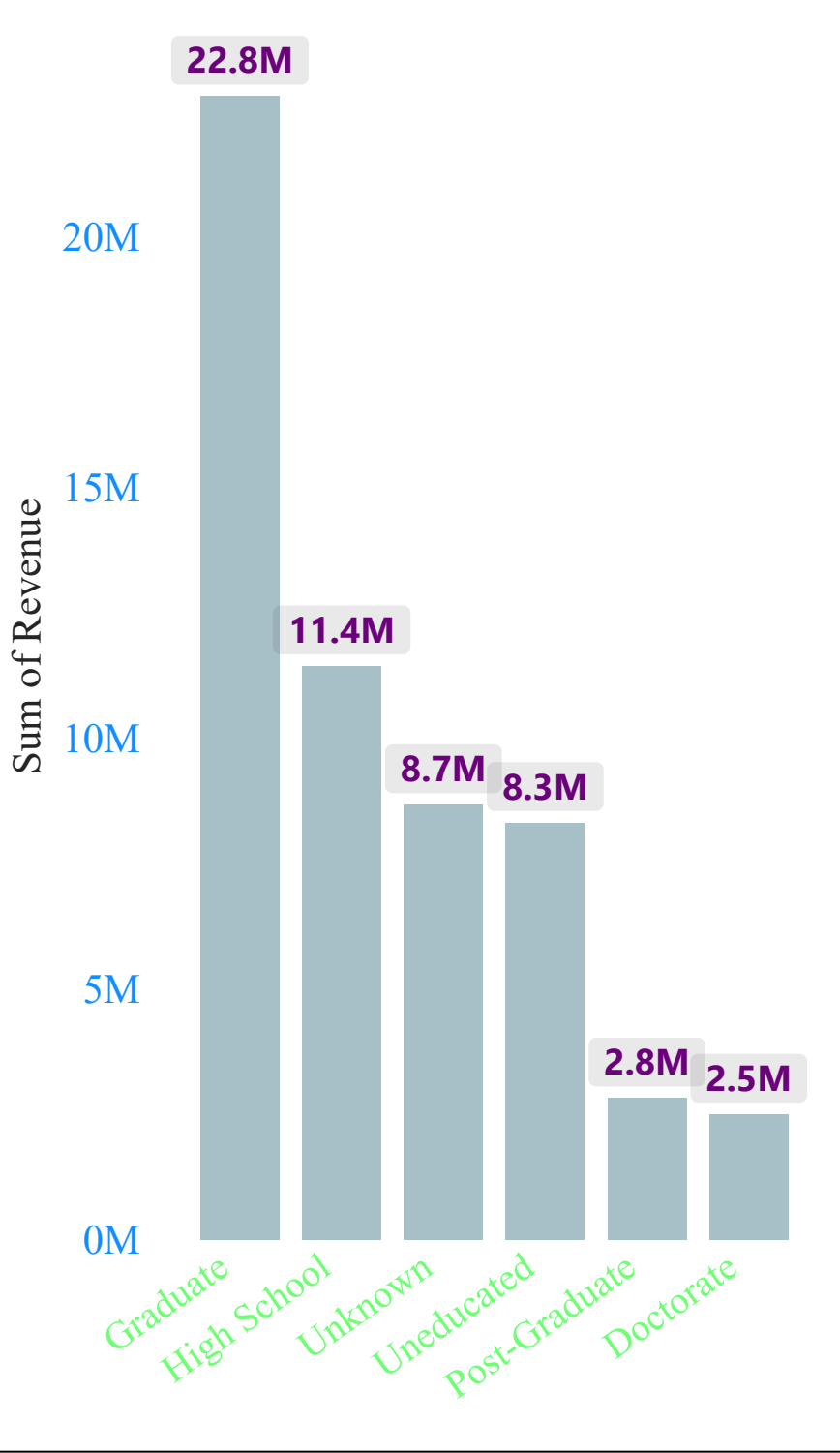
Count of delinquent_acc by card_category

- Blue: 9.4K
- Silver: 0.6K
- Gold: 0.2K
- Platinum: 0.1K
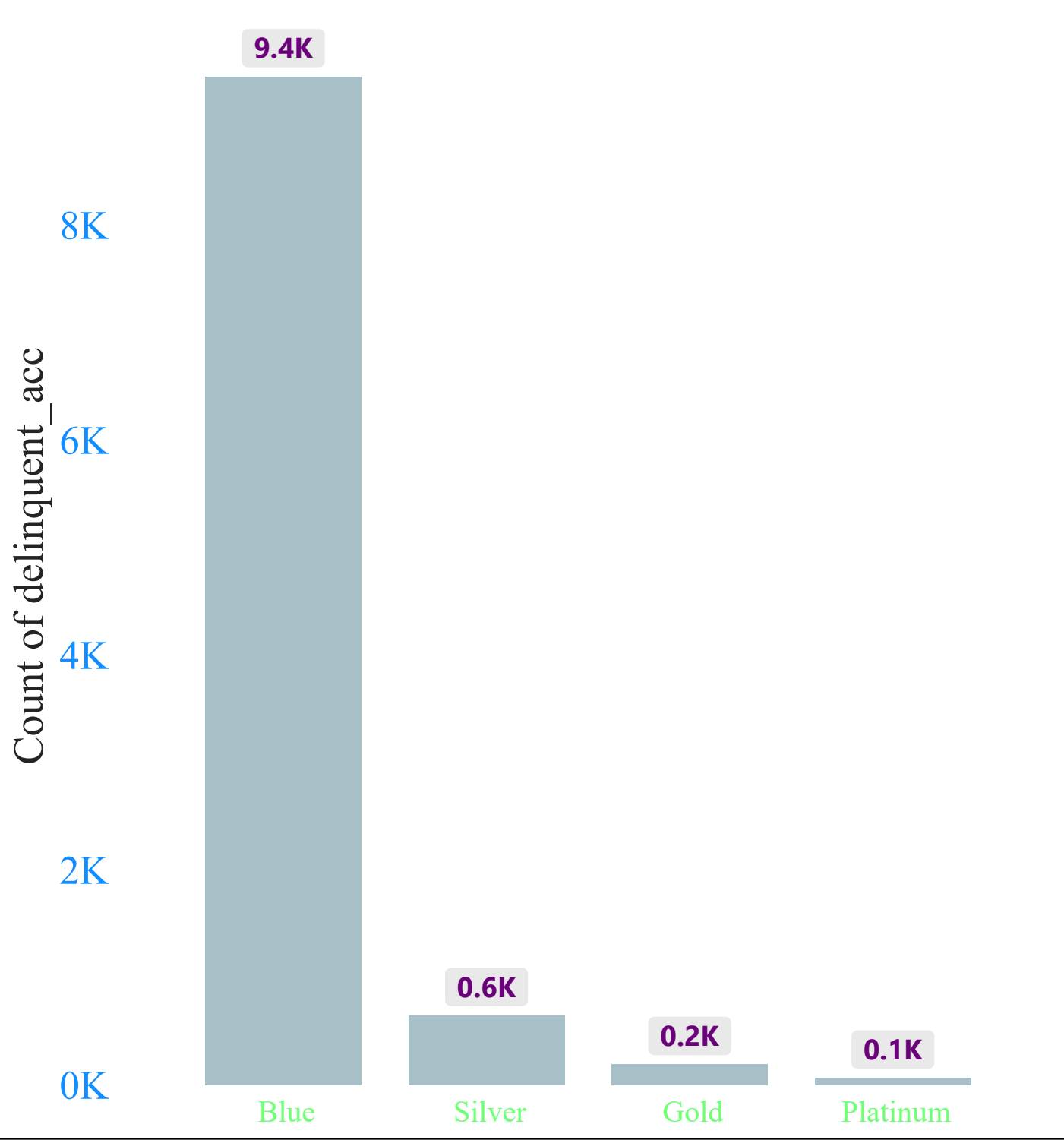
Sum of Revenue and Sum of total_trans_ct by qtr

Legend: Sum of Revenue, Sum of total_trans_ct

qtr	Sum of Revenue	Sum of total_trans_ct
Q1	14.0M	163.3K
Q2	13.8M	164.2K
Q3	14.2M	166.6K
Q4	14.5M	173.2K
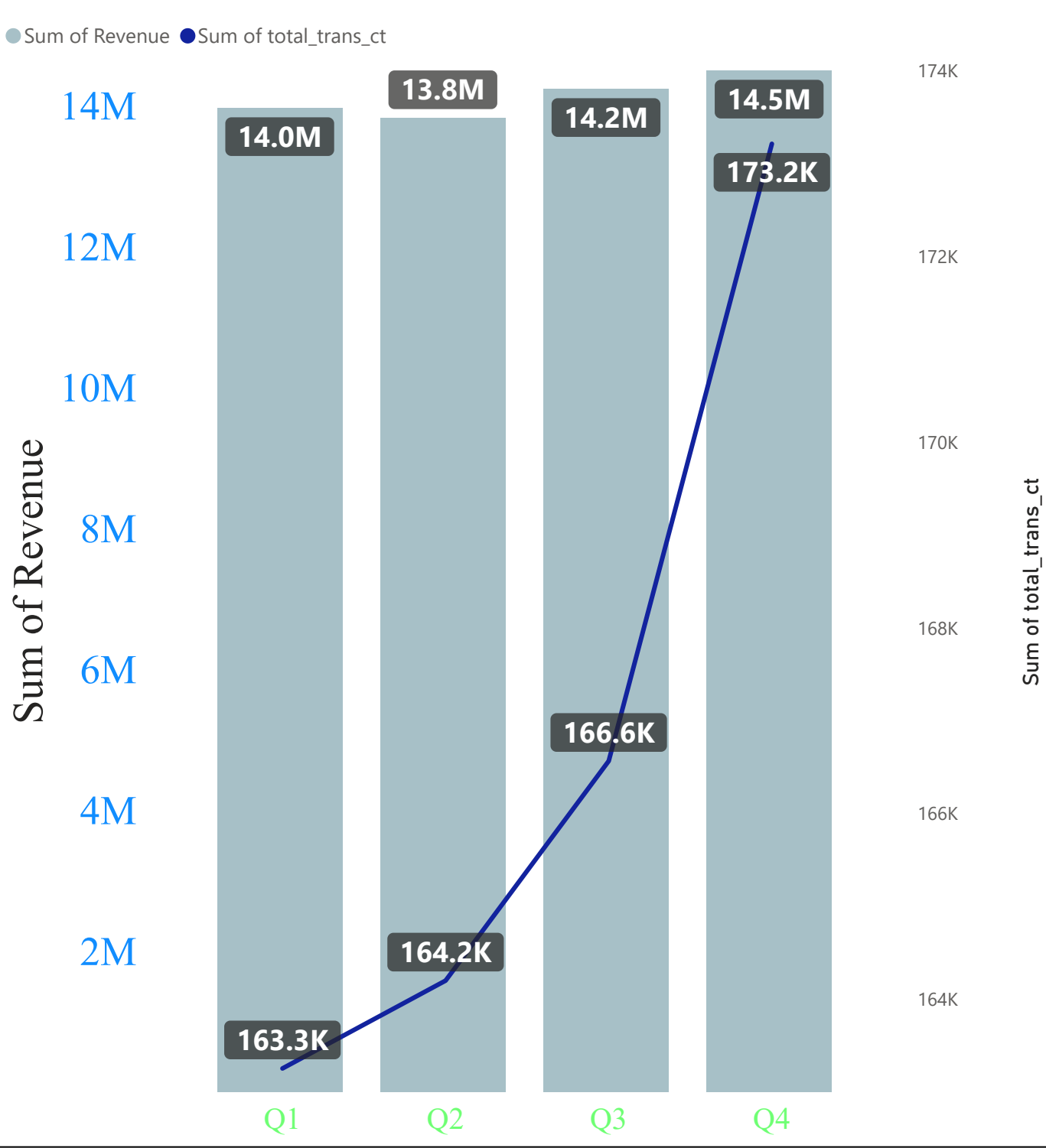
Credit   Card   Customer   Report

Revenue	**Total Interest**	**Income**	**satisfaction Score**
57M	**8M**	**588M**	**33K**

Sum of Revenue by gender

customer_job	Sum of Revenue	Sum of interest_earned	Sum of income
Blue-collar	7040606	967,751.42	73516911
Businessman	17697472	2,584,604.01	190350431
Govt	8335534	1,182,230.84	90834727
Retirees	4617448	641,692.22	49619308
Selfemployeed	8542826	1,141,510.40	77659931
White-collar	10283124	1,464,690.92	105618475
Total	56517011	7,982,479.81	587599783

week_start_date: All

Average of client_num by card_category
Gold | Silver | Blue | Platinum

Average of client_num by qtr
Q4 | Q3 | Q2 | Q1

Average of client_num by gender
F | M

Sum of Revenue by IncomeGroup

- High: 29.8M
- Med: 16.1M
- Low: 10.6M

Sum of Revenue by Quarter and gender

gender F ● M

Quarter	F	M
Qtr 1	6.5M	7.5M
Qtr 2	6.0M	7.8M
Qtr 3	6.5M	7.7M
Qtr 4	6.6M	7.9M

Sum of Revenue by AgeGroup and gender

gender ● F ● M

AgeGroup	F	M
30-40	4.2M	5.7M
50-60	8.8M	9.8M
40-50	11.0M	13.7M

Sum of Revenue by state_cd

- TX: 13.0M
- NY: 13.0M
- CA: 12.9M
- FL: 10.0M
- NJ: 4.4M

Sum of Revenue by card_category

- Blue: 47M
- Silver: 6M
- Gold: 3M
- Platinum: 1M

Sum of Revenue by dependent_count

- 5: 2.4M
- 4: 8.9M
- 3: 15.6M
- 2: 15.5M
- 1: 9.9M
- 0: 4.2M

Sum of Revenue by education_level

- Doctorate: 2.5M
- Post-Graduate: 2.8M
- Uneducated: 8.3M
- Unknown: 8.7M
- High School: 11.4M
- Graduate: 22.8M

Sum of Revenue by marital_status

- Unknown: 4.2M
- Single: 23.7M
- Married: 28.6M