

CREDIT CARD

WEEKLY STATUS REPORT

Project Content :

- 1. Project objective**
- 2. Data from SQL & Excel**
- 3. Data processing & DAX**
- 4. Dashboard & insights**
- 5. 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.

Download Data

GitHub:

<https://github.com/inarenpithani/Credit-Card-Financial-Dashboard-PowerBI>

Import data to SQL database

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

| | | | | |
|---|----|----------|---|-----------------------|
| ✓ | 8 | 13:11:14 | PREPARE stmt FROM 'INSERT INTO `ccdb`.`credit_card` (`Client_Num`,`Card_Category`,`Annual_Fees`,`Activation_30_Days`,`Customer_Acq... | OK |
| ✓ | 9 | 13:13:26 | DEALLOCATE PREPARE stmt | OK |
| ✓ | 10 | 13:14:17 | select * from credit_card LIMIT 0, 50000 | 10108 row(s) returned |
| ✓ | 11 | 13:14:53 | SHOW SESSION VARIABLES LIKE 'lower_case_table_names' | OK |
| ✓ | 12 | 13:14:53 | SHOW DATABASES | OK |



DAX Queries

```
AgeGroup = SWITCH(  
    TRUE(),  
    'customer'[Customer_Age] < 30, "20-30",  
    'customer'[Customer_Age] >= 30 && 'customer'[Customer_Age] < 40, "30-40",  
    'customer'[Customer_Age] >= 40 && 'customer'[Customer_Age] < 50, "40-50",  
    'customer'[Customer_Age] >= 50 && 'customer'[Customer_Age] < 60, "50-60",  
    'customer'[Customer_Age] >= 60, "60+",  
    "unknown"  
)
```

```
IncomeGroup = SWITCH(  
    TRUE(),  
    'customer'[Income] < 35000, "Low",  
    'customer'[Income] >= 35000 && 'ccdb customer'[Income] < 70000, "Med",  
    'customer'[Income] >= 70000, "High",  
    "unknown"  
)
```

DAX Queries

```
week_num2 = WEEKNUM('credit_card'[Week_Start_Date])
```

```
Revenue = 'credit_card'[Annual_Fees] + 'credit_card'[total_trans_amt] +  
'credit_card'[interest_earned]
```

```
Current_week_Revenue = CALCULATE(  
    SUM('credit_card'[Revenue]),  
    FILTER(  
        ALL('credit_card'),  
        'credit_card'[week_num2] = MAX('credit_card'[week_num2])))
```

```
Previous_week_Revenue = CALCULATE(  
    SUM('credit_card'[Revenue]),  
    FILTER(  
        ALL('credit_card'), 'credit_card'[week_num2] = MAX('credit_card'[week_num2])-1))
```

Project Insights- Week 53 (31st Dec)

WOW change:

- Revenue checked increased or decreased.
- Total Transaction Amt & Count checked increased or decreased.
- Customer count checked increased or decreased.

Overview YTD:

- Overall revenue is 55M
- Total interest is 7.8M
- Total transaction amount is 45M
- Male customers are contributing more in revenue 30M, female 25M
- 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 6.07%

Add to resume

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.**