




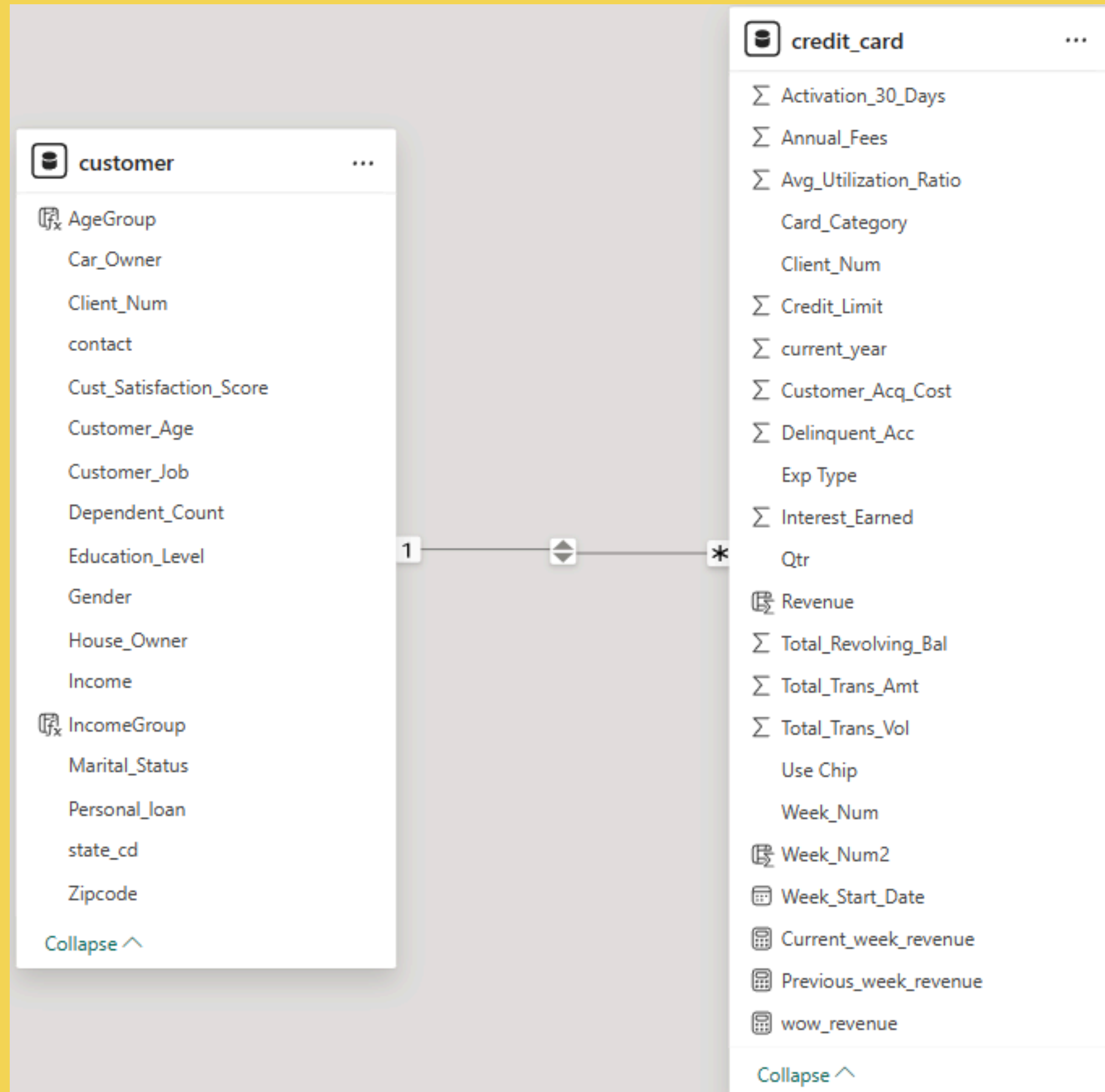
CREDIT CARD FINANCIAL DASHBOARD



PROJECT OVERVIEW

To create a detailed credit card financial dashboard that offers real-time insights into essential performance metrics and trends, empowering stakeholders to track and evaluate credit card operations efficiently. The dashboard will enable comprehensive analysis, ensuring data-driven decision-making and effective monitoring of key financial activities weekly.

MODEL VIEW



DAX QUERIES

AgeGroup

```
AgeGroup = switch(
    true(),
    'customer'[Customer_Age] <= 30, "18-30",
    '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

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

Week_Num2

```
Week_Num2 = WEEKNUM(credit_card[Week_Start_Date])
```

DAX QUERIES

Current_week_revenue

```
Current_week_revenue = CALCULATE(  
    sum('credit_card'[Revenue]),  
    FILTER(  
        all('credit_card'),  
        'credit_card'[Week_Num2] = MAX('credit_card'[Week_Num2])))
```

Previous_week_revenue

```
Previous_week_revenue = CALCULATE(  
    sum('credit_card'[Revenue]),  
    FILTER(  
        all('credit_card'),  
        'credit_card'[Week_Num2] = MAX('credit_card'[Week_Num2])-1))
```

Revenue

```
Revenue = credit_card[Annual_Fees] + credit_card[Total_Trans_Amt] + credit_card[Interest_Earned]
```


Credit Card Transaction Report

F

M

Average

High

Low

Q2

Q3

Q1

Q4

Total Revenue

55M

Transaction Amount

45M

Total Interest

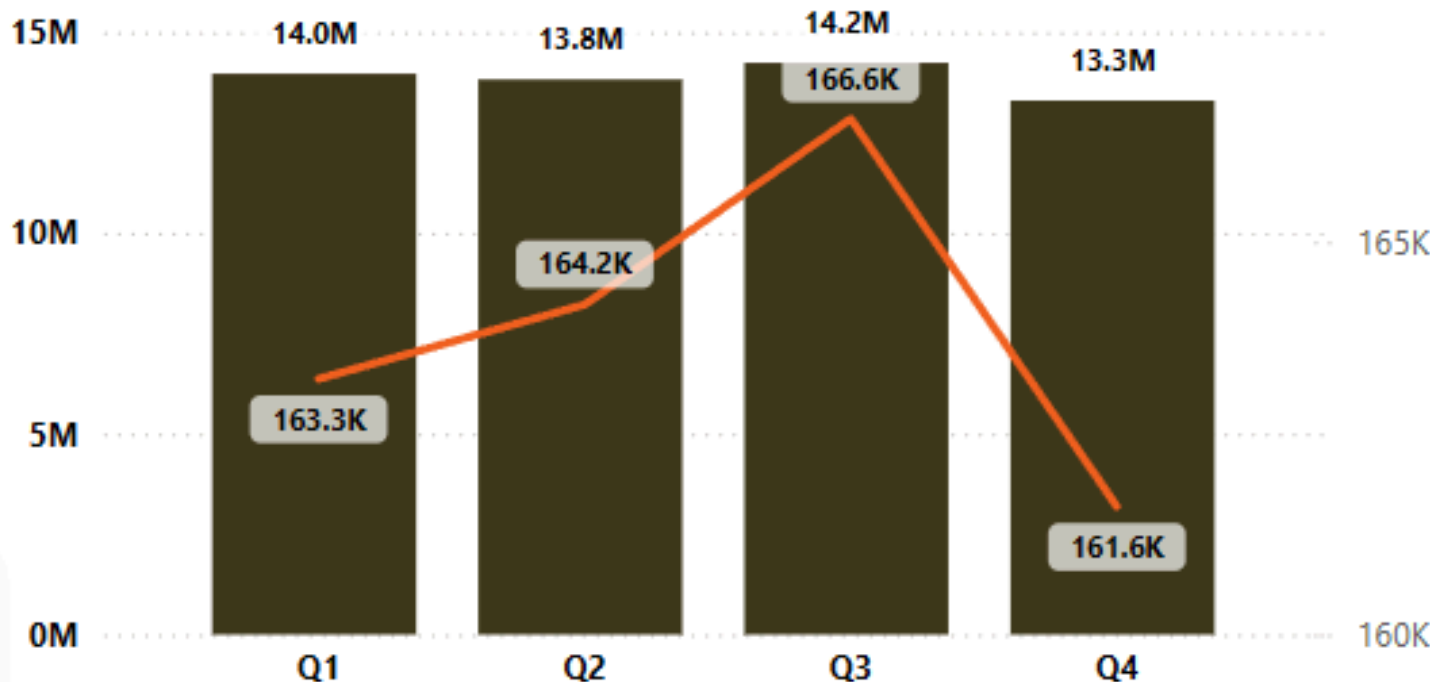
8M

Total Debt

12M

QTR Revenue & Transaction Count

Sum of Revenue Total transaction



Card Revenue Total Fees Total Interest Total Debt

Blue	46139398	2685635	6495888	10616925
Silver	5586332	187505	812081	786583
Gold	2454072	56210	373784	257031
Platinum	1135608	20665	161629	92964
Total	55315410	2950015	7843382	11753503

Date

01-01-2023



24-12-2023



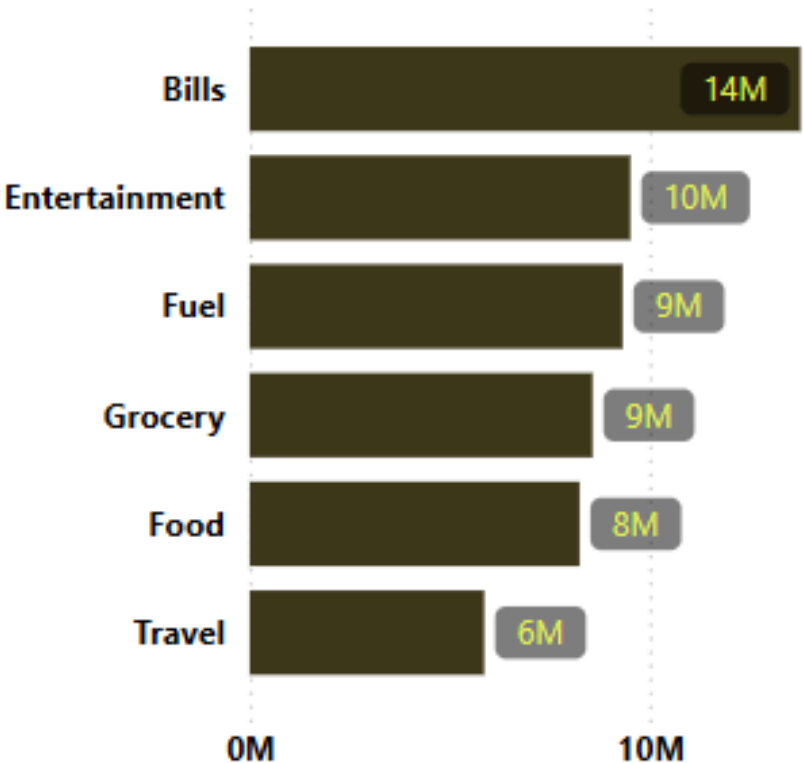
Blue

Gold

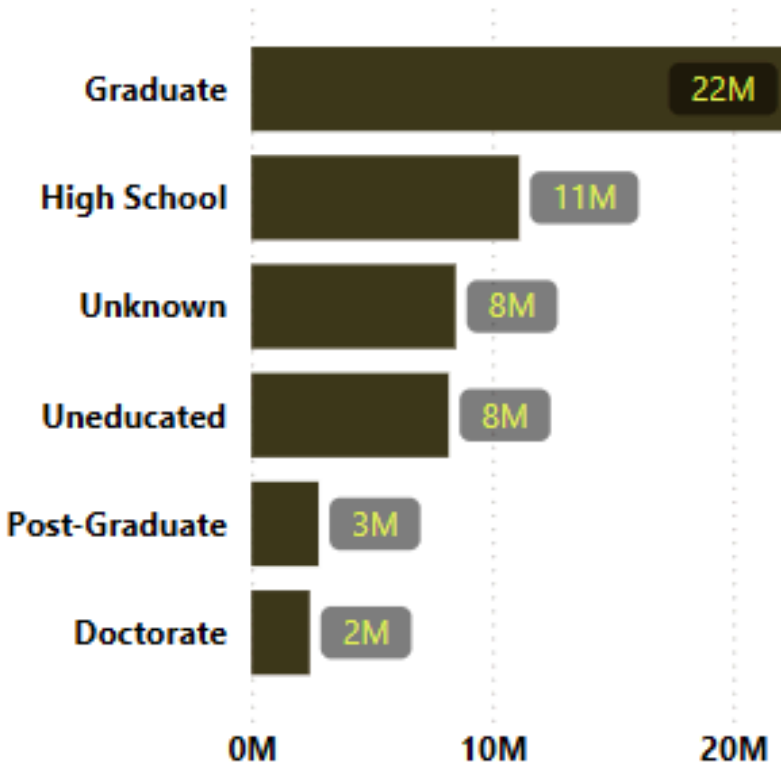
Platinum

Silver

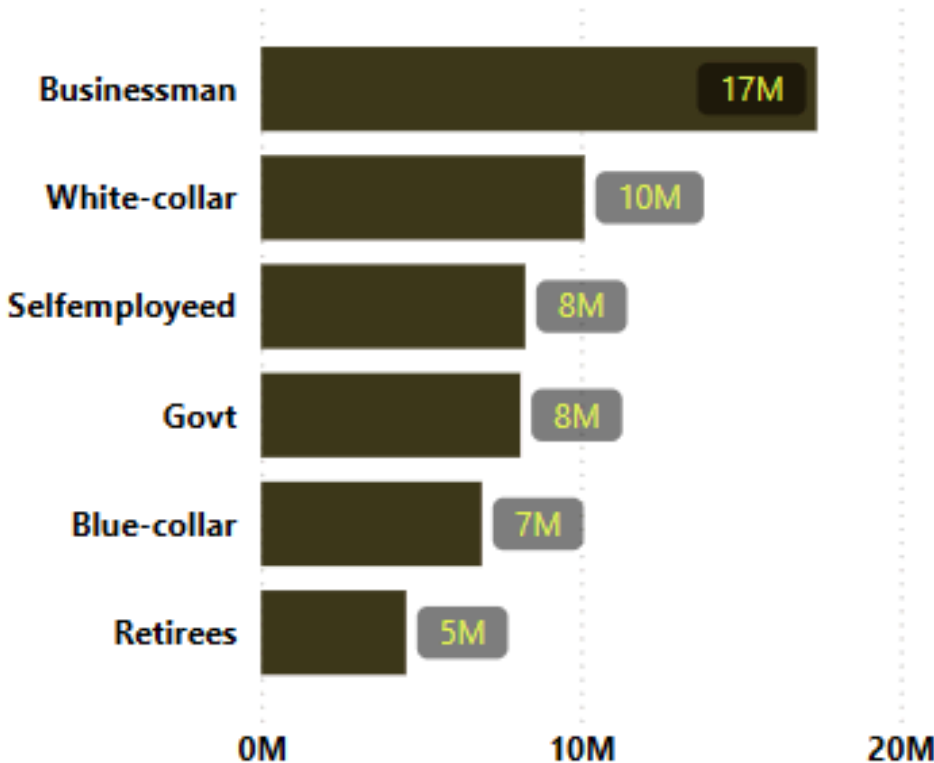
Revenue by Expenditure Type



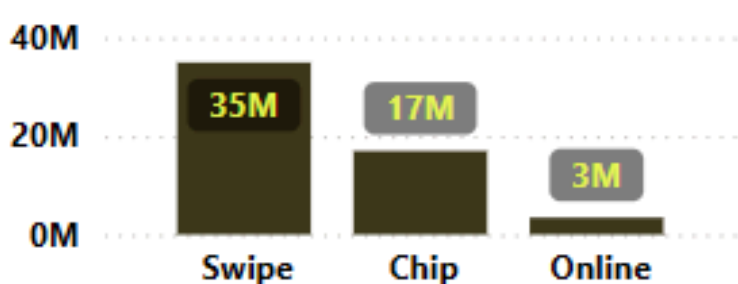
Revenue by Education



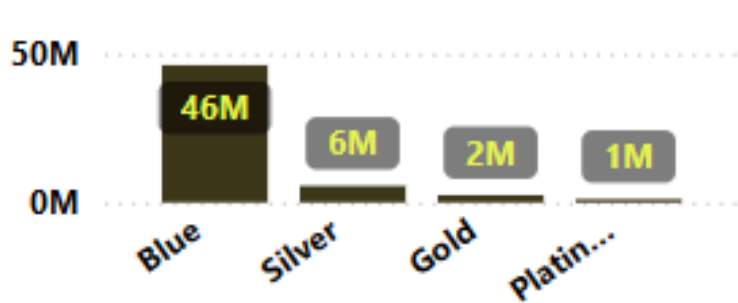
Revenue by Job



Revenue by Chip



Revenue by Card



Credit Card Customer Report

F

5.88K

M

4.23K

Average

High

Low

Q2

Q3

Q1

Q4

Total Revenue

55M

Average of Income

57.0K

Total Interest

8M

CSS

32K

Date

01-01-2023



24-12-2023



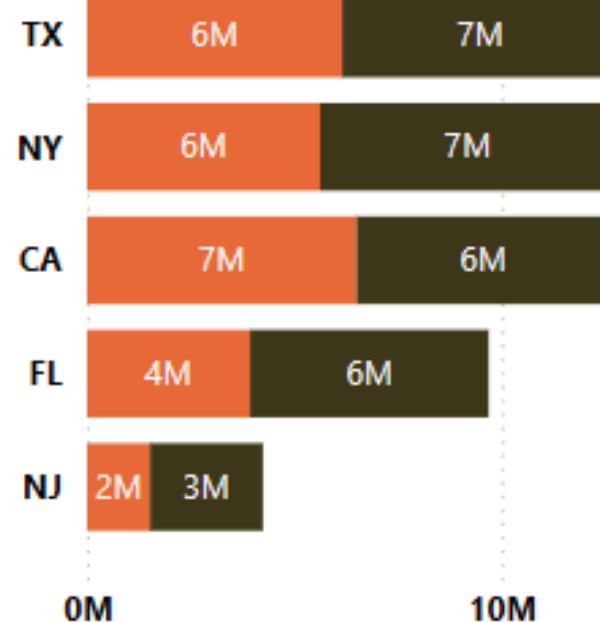
Blue

Gold

Platinum

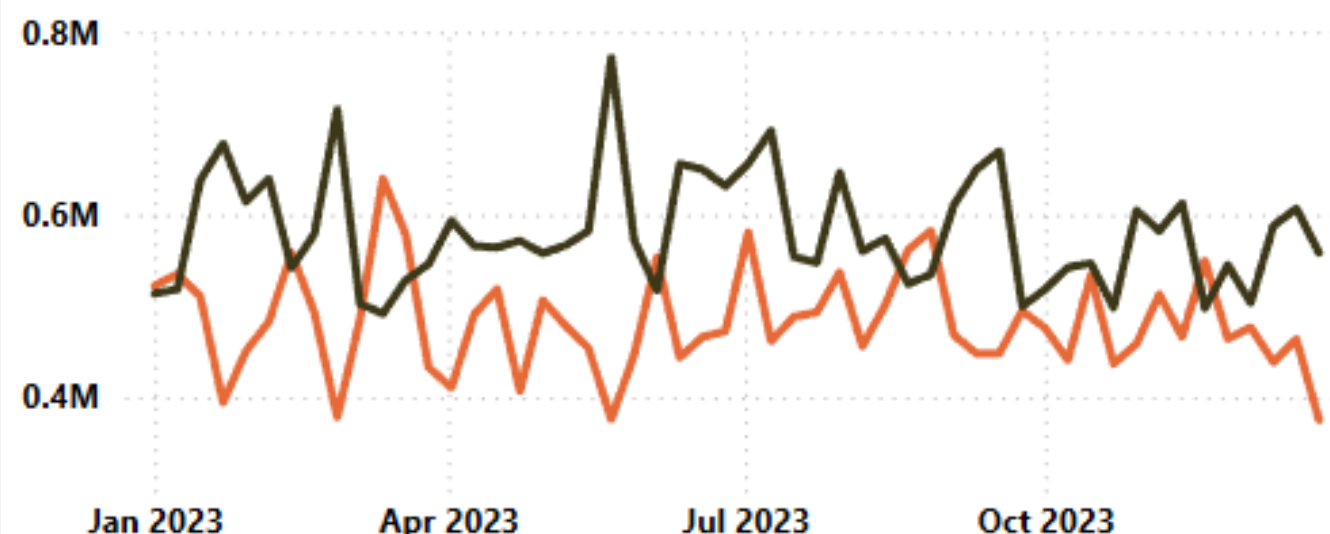
Silver

Top 5 States

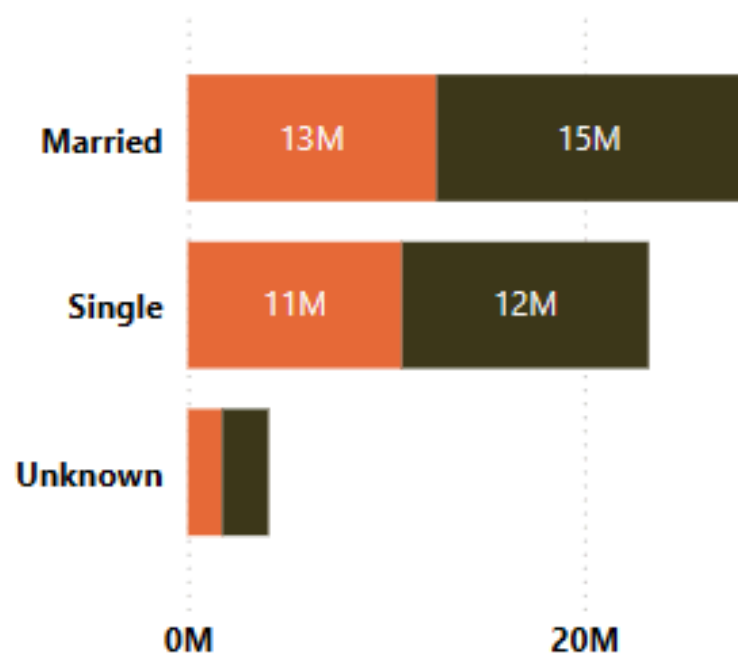


Job	Revenue	Income	Transaction	CSS Score
Blue-collar	6904279	72262158.0	5488838	5004
Businessman	17387832	186959919.0	14285412	6138
Govt	8111701	88773989.0	6507875	4911
Retirees	4535184	48675030.0	3623120	3128
Selfemployed	8261758	75313288.0	6395026	8282
White-collar	10114656	103930055.0	8221742	4774
Total	55315410	575914439.0	44522013	32237

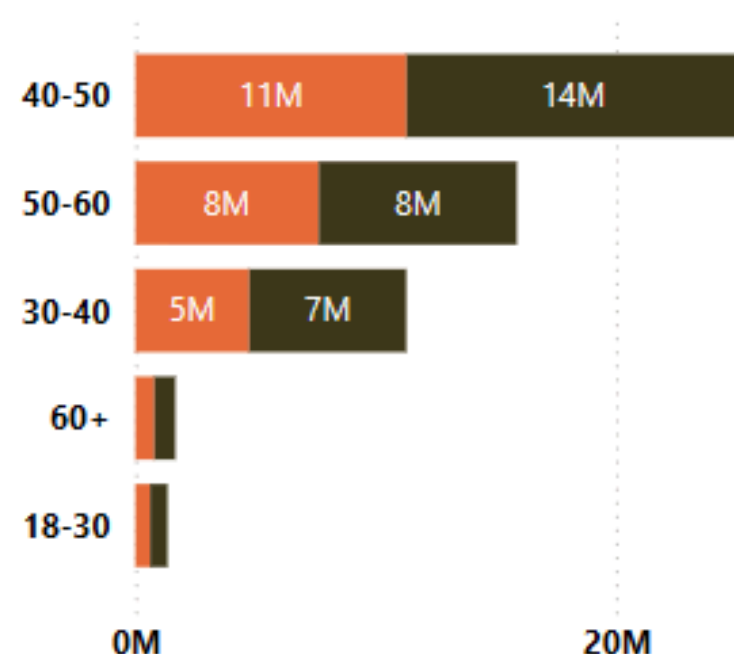
Revenue vs Gender



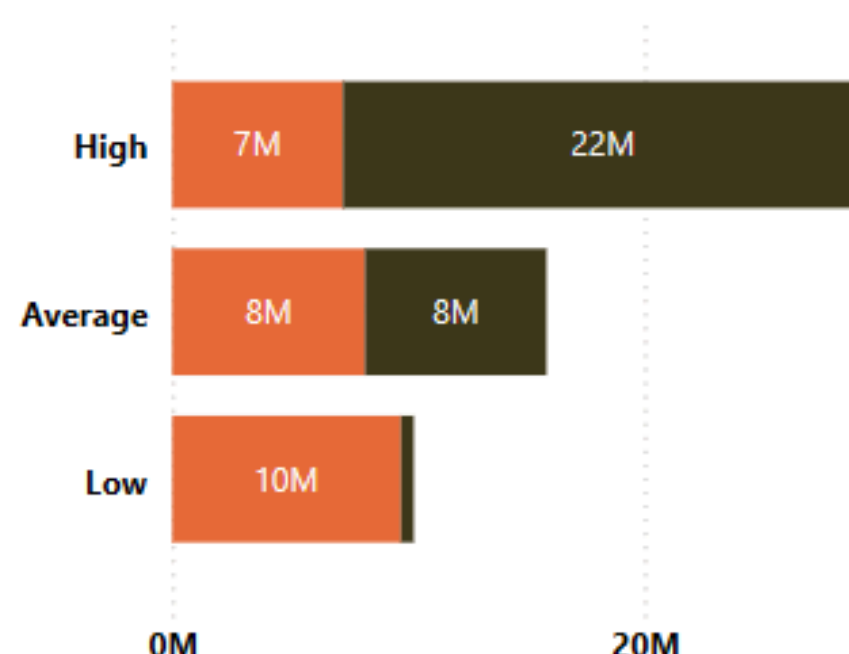
Revenue vs Marital Status



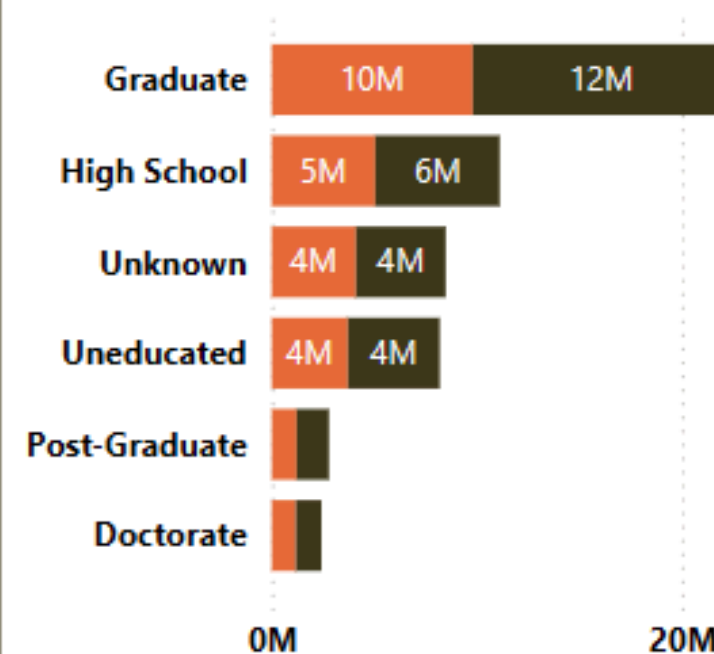
Revenue vs Age Group



Revenue vs Income Group



Revenue vs Education_Level



KEY INSIGHTS

Credit Card Transaction Report

- Total Transaction
- Total interest
- Total debt
- Card Type Insights
- Quarterly Trends
- Revenue by Expenditure Type
- Revenue by Chip Type
- Education and Job Contribution

Credit Card Customer Report

- Total revenue
- Average income
- Total interest earned
- CSS
- Job-based Insights
- Revenue by Gender
- Top 5 States
- Marital Status
- Age Group & Income Group
- Education Level



THANK YOU

Jahanvi Kashyap