﻿**BANK LOAN REPORT QUERY DOCUMENTATION**

* *BANK LOAN REPORT | SUMMARY*

**- KPI’s**

**1. Total Loan Applications:**

SELECT COUNT(id) AS Total\_Applications FROM bank\_loan\_data

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**2.** **MTD Loan Application:**

SELECT COUNT(id) AS Total\_Applications FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 12



**3. PMTD Loan Application:**

SELECT COUNT(id) AS Total\_Applications FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 11



**4. Total Funded Amount:**

SELECT SUM(loan\_amount) AS Total\_Funded\_Amount FROM bank\_loan\_data



**5. MTD Total Funded Amount:**

SELECT SUM(loan\_amount) AS Total\_Funded\_Amount FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 12



**6. PMTD Total Funded Amount:**

SELECT SUM(loan\_amount) AS Total\_Funded\_Amount FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 11



**7. Total Amount Received:**

SELECT SUM(total\_payment) AS Total\_Amount\_Collected FROM bank\_loan\_data



**8. MTD Total Amount Received:**

SELECT SUM(total\_payment) AS Total\_Amount\_Collected FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 12



**9. PMTD Total Amount Received:**

SELECT SUM(total\_payment) AS Total\_Amount\_Collected FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 11

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**10. Average Interest Rate:**

SELECT AVG(int\_rate)\*100 AS Avg\_Int\_Rate FROM bank\_loan\_data



**11. MTD Average Interest:**

SELECT AVG(int\_rate)\*100 AS MTD\_Avg\_Int\_Rate FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 12



**12. PMTD Average Interest:**

SELECT AVG(int\_rate)\*100 AS PMTD\_Avg\_Int\_Rate FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 11



**13. Average DTI:**

SELECT AVG(dti)\*100 AS Avg\_DTI FROM bank\_loan\_data



**14. MTD Average DTI:**

SELECT AVG(dti)\*100 AS MTD\_Avg\_DTI FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 12



**15. PMTD Average DTI:**

SELECT AVG(dti)\*100 AS PMTD\_Avg\_DTI FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 11



**- Good Loans Issued  
1. Good Loan Percentage:**

SELECT

(COUNT(CASE WHEN loan\_status = 'Fully Paid' OR loan\_status = 'Current' THEN id

END) \* 100.0) /

COUNT(id) AS Good\_Loan\_Percentage

FROM bank\_loan\_data

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**2. Good Loan Applications:**

SELECT COUNT(id) AS Good\_Loan\_Applications FROM bank\_loan\_data

WHERE loan\_status = 'Fully Paid' OR loan\_status = 'Current'

****

**3. Good Loan Funded Amount:**

SELECT SUM(loan\_amount) AS Good\_Loan\_Funded\_amount FROM bank\_loan\_data

WHERE loan\_status = 'Fully Paid' OR loan\_status = 'Current'

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**4. Good Loan Amount Received:**

SELECT SUM(total\_payment) AS Good\_Loan\_amount\_received FROM bank\_loan\_data

WHERE loan\_status = 'Fully Paid' OR loan\_status = 'Current'

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**- Bad Loans Issued  
1. Bad Loan Percentage:**

SELECT

(COUNT(CASE WHEN loan\_status = 'Charged Off' THEN id END) \* 100.0) /

COUNT(id) AS Bad\_Loan\_Percentage

FROM bank\_loan\_data

****

**2. Bad Loan Applications:**

SELECT COUNT(id) AS Bad\_Loan\_Applications FROM bank\_loan\_data

WHERE loan\_status = 'Charged Off'

****

**3. Bad Loan Funded Amount:**

SELECT SUM(loan\_amount) AS Bad\_Loan\_Funded\_amount FROM bank\_loan\_data

WHERE loan\_status = 'Charged Off'

****

**4. Bad Loan Amount Received:**

SELECT SUM(total\_payment) AS Bad\_Loan\_amount\_received FROM bank\_loan\_data

WHERE loan\_status = 'Charged Off'

****

**- LOAN STATUS**

SELECT

loan\_status,

COUNT(id) AS LoanCount,

SUM(total\_payment) AS Total\_Amount\_Received,

SUM(loan\_amount) AS Total\_Funded\_Amount,

AVG(int\_rate \* 100) AS Interest\_Rate,

AVG(dti \* 100) AS DTI

FROM

bank\_loan\_data

GROUP BY

loan\_status

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SELECT

loan\_status,

SUM(total\_payment) AS MTD\_Total\_Amount\_Received,

SUM(loan\_amount) AS MTD\_Total\_Funded\_Amount

FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 12

GROUP BY loan\_status

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* *BANK LOAN REPORT | OVERVIEW*

**- MONTH**

SELECT

MONTH(issue\_date) AS Month\_Munber,

DATENAME(MONTH, issue\_date) AS Month\_name,

COUNT(id) AS Total\_Loan\_Applications,

SUM(loan\_amount) AS Total\_Funded\_Amount,

SUM(total\_payment) AS Total\_Amount\_Received

FROM bank\_loan\_data

GROUP BY MONTH(issue\_date), DATENAME(MONTH, issue\_date)

ORDER BY MONTH(issue\_date)

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**- STATE**

SELECT

address\_state AS State,

COUNT(id) AS Total\_Loan\_Applications,

SUM(loan\_amount) AS Total\_Funded\_Amount,

SUM(total\_payment) AS Total\_Amount\_Received

FROM bank\_loan\_data

GROUP BY address\_state

ORDER BY address\_state

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**- TERM**

SELECT

term AS Term,

COUNT(id) AS Total\_Loan\_Applications,

SUM(loan\_amount) AS Total\_Funded\_Amount,

SUM(total\_payment) AS Total\_Amount\_Received

FROM bank\_loan\_data

GROUP BY term

ORDER BY term

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**- EMPLOYEE LENGTH**

SELECT

emp\_length AS Employee\_Length,

COUNT(id) AS Total\_Loan\_Applications,

SUM(loan\_amount) AS Total\_Funded\_Amount,

SUM(total\_payment) AS Total\_Amount\_Received

FROM bank\_loan\_data

GROUP BY emp\_length

ORDER BY emp\_length

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**- PURPOSE**

SELECT

purpose AS PURPOSE,

COUNT(id) AS Total\_Loan\_Applications,

SUM(loan\_amount) AS Total\_Funded\_Amount,

SUM(total\_payment) AS Total\_Amount\_Received

FROM bank\_loan\_data

GROUP BY purpose

ORDER BY purpose

**A screenshot of a table

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**- HOME OWNERSHIP**

SELECT

home\_ownership AS Home\_Ownership,

COUNT(id) AS Total\_Loan\_Applications,

SUM(loan\_amount) AS Total\_Funded\_Amount,

SUM(total\_payment) AS Total\_Amount\_Received

FROM bank\_loan\_data

GROUP BY home\_ownership

ORDER BY home\_ownership

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*Note: We have applied multiple Filters on all the dashboards. You can check the results for the filters as well by modifying the query and comparing the results.*

*For instance,*

*See the results when we hit the Grade A in the filters for dashboards.*

*SELECT*

*purpose AS PURPOSE,*

*COUNT(id) AS Total\_Loan\_Applications,*

*SUM(loan\_amount) AS Total\_Funded\_Amount,*

*SUM(total\_payment) AS Total\_Amount\_Received*

*FROM bank\_loan\_data*

*WHERE grade = 'A'*

*GROUP BY purpose*

*ORDER BY purpose*