

CREDIT CARD

WEEKLY STATUS REPORT

Project Overview

1. Project objective
2. Data from SQL
3. Data processing & DAX
4. Dashboard & insights

Project Objective

Developed a comprehensive credit card weekly dashboard to deliver real-time insights into key performance metrics and trends, enabling efficient monitoring and analysis of credit card operations for improved data-driven decision-making and process optimization.

Import data to SQL database

1. Download csv file.
2. Import csv file into SQL.
3. Create tables in SQL.

DAX Queries

1. To find revenue

```
revenue = 'public credit_card'[annual_fees] + 'public credit_card'[total_trans_amt] + 'public credit_card'[interest_earned]
```

2. To find week number

```
weekNum = WEEKNUM('public credit_card'[week_start_date].[Date])
```

3. To find income group of customers

```
income_bracket = SWITCH(  
    TRUE(),  
    'public cus_detail'[income] < 35000, "Low",  
    'public cus_detail'[income] >= 35000 && 'public cus_detail'[income] < 70000, "Mid",  
    'public cus_detail'[income] >= 70000, "High",  
    "Unknown")
```

DAX Queries

4. To find age group of customers

```
AgeGroup = SWITCH(  
    TRUE(),  
    'public cus_detail'[customer_age] < 30, "0-30",  
    'public cus_detail'[customer_age] >= 30 && 'public cus_detail'[customer_age] < 40, "30-40",  
    'public cus_detail'[customer_age] >= 40 && 'public cus_detail'[customer_age] < 50, "40-50",  
    'public cus_detail'[customer_age] >= 50 && 'public cus_detail'[customer_age] < 60, "50-60",  
    'public cus_detail'[customer_age] >= 60, "60+",  
    "Unknown"  
)
```

DAX Queries

5. To find current week revenue

```
current_week_revenue = CALCULATE(  
    SUM('public credit_card'[revenue]),  
    FILTER(  
        ALL('public credit_card'),  
        'public credit_card'[weekNum] = MAX('public credit_card'[weekNum])))
```

6. To find last week revenue

```
last_week_revenue = CALCULATE(  
    SUM('public credit_card'[revenue]),  
    FILTER(  
        ALL('public credit_card'),  
        'public credit_card'[weekNum] = MAX('public credit_card'[weekNum])-1))
```

7. To find weekly revenue change

```
Week_RevChang = DIVIDE([current_week_revenue] - [last_week_revenue], [last_week_revenue])
```

Project Insights- Week 53 (31st Dec) after adding additional data

- Overall revenue is 56.52M
- Total interest is approx 8M
- Total transaction amount is 46M
- Male customers are contributing more in revenue 30.93M, female 25.59M
- 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%