**BANK LOAN REPORT QUERY DOCUMENT**

**A.** **BANK LOAN REPORT | SUMMARY**

**KPI’s:**

**Total Loan Applications**

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

A screenshot of a computer

Description automatically generated

**MTD Loan Applications**

**SELECT COUNT(id) AS MTD\_Total\_Applications FROM bank\_loan\_data**

**WHERE MONTH(issue\_date) = 11 AND MONTH(issue\_date) = 2021**

A screen shot of a computer

Description automatically generated

**PMTD Loan Application  
SELECT COUNT(id) AS Total\_Applications FROM bank\_loan\_data**

**WHERE MONTH(issue\_date) = 10**

A blue rectangle with black text

Description automatically generated

**Total Funded Amount**

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

A close-up of a number

Description automatically generated

**MTD Total Funded Amount**

**SELECT SUM(loan\_amount) AS MTD\_Total\_Funded\_Amount FROM bank\_loan\_data**

**WHERE MONTH(issue\_date) = 11**

A screenshot of a computer

Description automatically generated

**PMTD Total Funded Amount**

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

**WHERE MONTH(issue\_date) = 10**

A screenshot of a computer

Description automatically generated

**Total Amount Received**

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

A close up of numbers

Description automatically generated

**MTD Total Amount Received**

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

**WHERE MONTH(issue\_date) = 11**

A close up of numbers

Description automatically generated

**PMTD Total Amount Received**

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

**WHERE MONTH(issue\_date) = 10**

A screenshot of a computer

Description automatically generated

**Average Interest Rate**

SELECT ROUND(AVG(int\_rate) \* 100, 2) as Avg\_interest\_rate FROM loan\_data

A close-up of a website

Description automatically generated

**MTD Average Interest**

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

**WHERE MONTH(issue\_date) = 11**

A close-up of a word

Description automatically generated

**PMTD Average Interest**

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

**WHERE MONTH(issue\_date) = 10**

A screen shot of a computer

Description automatically generated

**Avg DTI**

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

A screen shot of a computer

Description automatically generated

**MTD Avg DTI**

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

**WHERE MONTH(issue\_date) = 11**

A close up of a number

Description automatically generated

**PMTD Avg DTI**

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

**WHERE MONTH(issue\_date) = 10**

A screenshot of a computer

Description automatically generated

**GOOD LOAN ISSUED**

**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**

**Good Loan Applications**

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

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

**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'**

**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'**

**BAD LOAN ISSUED**

**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**

**Bad Loan Applications**

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

**WHERE loan\_status = 'Charged Off'**

**Bad Loan Funded Amount**

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

**WHERE loan\_status = 'Charged Off'**

**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**

**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**

**B.** **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)**

**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**

**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**

**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**

**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**

**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**

***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 e.g***

***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***