

credit card

weekly dashboard report

MENGARAM BHARADWAJA



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.

mengaram bharadwaja

IMPORT DATA TO SQL DATA BASE

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



DATA OUTPUT MESSEGES NOTIFICATIONS

COPY 10108

QUERY RETURNED SUCCESFULLY IN 82 M SEC

Dax queries

AgeGroup = SWITCH(

TRUE(),

'public cust_detail'[customer_age] < 30, "20-30",

'public cust_detail'[customer_age] >= 30 && 'public cust_detail'[customer_age] < 40, "30-40" ,

'public cust_detail'[customer_age] >= 40 && 'public cust_detail'[customer_age] < 50, "40-50",

'public cust_detail'[customer_age] >= 50 && 'public cust_detail'[customer_age] < 60, "50-60",

'public cust_detail'[customer_age] >= 60, "60+",

"unknown"

)

IncomeGroup = SWITCH(

TRUE(),

'public cust_detail'[income] < 35000, "Low",

'public cust_detail'[income] >= 35000 && 'public cust_detail'[income] < 70000, "med" ,

'public cust_detail'[income] >= 70000, "High",

"unknown"

)



Dax queries

```
week_num2 = WEEKNUM('public cc_detail'[week_start_date])
```

```
Revenue = 'public cc_detail'[annual _ fees] + 'public cc_detail'[total_trans_amt] + 'public cc_detail'[interest _ earned]
```

```
Current _week_ Revenue = CALCULATE(  
    SUM('public cc_detail' [Revenue]),  
    FILTER(  
        ALL('public cc_detail '),  
        'public cc_detail' [week_num2] = MAX('public cc_detail' [week_num2])))
```

```
Previous _week _Revenue= CALCULATE(  
    SUM('public cc_detail Revenue'],  
    FILTER(  
        ALL('public cc-detail'),  
        public cc _ detail'[week_num2] = MAX('public cc_detail' [week_num2])-1))
```



PROJECT INSIGHTS- WEEK 53 (31ST DEC)

WoW change:

- Revenue increased by 28.8%,
- Total Transaction Amt & Count increased by xx% & xx%
- Customer count increased by xx%

Overview YTD:

- Overall revenue is 57M
- Total interest is 8M
- Total transaction amount is 46M
- Male customers are contributing more in revenue 31M, female 26M
- 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%



NOTE: YOU CAN ADD MORE INSIGHTS