BANK LOAN REPORT DASHBOARD:

Project Overview:

This project presents a comprehensive BANK LOAN REPORT DASHBOARD developed using Excel, SQL, and Tableau to monitor, analyze, and visualize a bank's lending activities and performance.It is designed to track key loan metrics, compare trends over time, and assess the quality of loan portfolios. The final dashboard helps stakeholders make data-driven decisions in real-time.

Project Structure:

Tools Used

– Excel – for initial data inspection and cleanup
– SQL – to derive insights, KPIs, and trend metrics
– Tableau– for building interactive dashboards

Key Metrics (KPIs):

1. Summary Dashboard
– Total Loan Applications
– Total Funded Amount
– Total Amount Received
– Average Interest Rate
– Average Debt-to-Income Ratio (DTI)
– Month-to-Date (MTD) and Month-over-Month (MoM) metrics for the above

  Good Loans vs Bad Loans
Good Loans: Status = Fully Paid, Current
Bad Loans: Status = Charged Off

KPIs include:
– Applications, Funded Amount, and Amount Received for both loan types
– Good vs. Bad Loan Percentages

 Loan Status Grid View
A detailed matrix to monitor:
– Funded Amount
– Received Amount
– Interest Rate
– Debt-to-Income Ratios

2.Dashboard Visualizations:

1.Monthly Trends (Line Chart)
Visualizes loan application activity, funding, and payments over time.

2. Regional Analysis (Filled Map)
Highlights lending performance across US states.

3. Loan Term Analysis (Donut Chart)
Displays loan distribution by duration (e.g., 36 or 60 months).

4. Employee Length Analysis (Bar Chart)
Shows loan volume by borrower employment history.

5. Purpose of Loan (Bar Chart)
Breakdown of loans by reason (e.g., debt consolidation, education).

6. Home Ownership Analysis (Tree Map)
Compares loan activity based on housing status (own, rent, mortgage).

3.Detailed Dashboard:
Provides a one-stop snapshot of all key data for decision-makers.