**BANK LOAN REPORT QUERY DOCUMENT**

1. **BANK LOAN REPORT | SUMMARY**

**KPI’s:**

**Total Loan Applications**

SELECT COUNT(ID) AS Total\_Loan\_Applications FROM financial\_loan



**MTD Loan Applications**

SELECT COUNT(ID) AS MTD\_Total\_Loan\_Applications FROM financial\_loan

WHERE MONTH(ISSUE\_DATE) = 12 AND YEAR(ISSUE\_DATE) = 2021



**PMTD Loan Applications**  
SELECT COUNT(ID) AS PMTD\_Total\_Loan\_Applications FROM financial\_loan

WHERE MONTH(ISSUE\_DATE) = 11 AND YEAR(ISSUE\_DATE) = 2021



**Total Funded Amount**

SELECT SUM(loan\_amount) as Total\_Funded\_Amount FROM financial\_loan



**MTD Total Funded Amount**

SELECT SUM(loan\_amount) as MTD\_Total\_Funded\_Amount FROM financial\_loan

WHERE MONTH(ISSUE\_DATE) = 12 AND YEAR(ISSUE\_DATE) = 2021



**PMTD Total Funded Amount**

SELECT SUM(loan\_amount) as PMTD\_Total\_Funded\_Amount FROM financial\_loan

WHERE MONTH(ISSUE\_DATE) = 11 AND YEAR(ISSUE\_DATE) = 2021

****

**Total Amount Received**

SELECT SUM(total\_payment) AS Total\_Funded\_Amount FROM financial\_loan

****

**MTD Total Amount Received**

SELECT SUM(total\_payment) AS MTD\_Total\_Funded\_Amount FROM financial\_loan

WHERE MONTH(issue\_date) = 12 AND YEAR(issue\_date) = 2021

****

**PMTD Total Amount Received**

SELECT SUM(total\_payment) AS PMTD\_Total\_Funded\_Amount FROM financial\_loan

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

****

**Average Interest Rate**

SELECT ROUND(AVG(int\_rate),4)\*100 AS Avg\_Int\_Rate FROM financial\_loan

****

**MTD Average Interest**

SELECT ROUND(AVG(int\_rate),4)\*100 AS MTD\_Avg\_Int\_Rate FROM financial\_loan

WHERE MONTH(issue\_date) = 12 AND YEAR(issue\_date) = 2021

****

**PMTD Average Interest**

SELECT ROUND(AVG(int\_rate),4)\*100 AS PMTD\_Avg\_Int\_Rate FROM financial\_loan

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

****

**Avg DTI**

SELECT ROUND(AVG(dti),4)\*100 AS Avg\_DTI FROM financial\_loan

****

**MTD Avg DTI**

SELECT ROUND(AVG(dti),4)\*100 AS MTD\_Avg\_DTI FROM financial\_loan

WHERE MONTH(issue\_date)=12 AND YEAR(issue\_date)=2021

****

**PMTD Avg DTI**

SELECT ROUND(AVG(dti),4)\*100 AS PMTD\_Avg\_DTI FROM financial\_loan

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

****

**GOOD LOAN ISSUED**

**Good Loan Percentage**

SELECT (COUNT(CASE WHEN loan\_status='Fully Paid' OR loan\_status='Current' THEN id END) \* 100)

/

COUNT(id) AS Good\_Loan\_Percentage FROM financial\_loan

****

**Good Loan Applications**

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

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

****

**Good Loan Funded Amount**

SELECT SUM(loan\_amount) AS Good\_Loan\_Funded\_Amount FROM financial\_loan

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

****

**Good Loan Amount Received**

SELECT SUM(total\_payment) AS Good\_Loan\_Amount\_Received FROM financial\_loan

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)/

COUNT(id) AS Bad\_Loan\_Percentage

FROM financial\_loan

****

**Bad Loan Applications**

SELECT COUNT(id) AS Bad\_Loan\_Application FROM financial\_loan

WHERE loan\_status = 'Charged Off'

****

**Bad Loan Funded Amount**

SELECT SUM(loan\_amount) AS Bad\_Loan\_Funded\_Amount FROM financial\_loan

WHERE loan\_status = 'Charged Off'

****

**Bad Loan Amount Received**

SELECT SUM(total\_payment) AS Bad\_Loan\_Amount\_Received FROM financial\_loan

WHERE loan\_status = 'Charged Off'

****

**LOAN STATUS**

SELECT

loan\_status,

COUNT(id) AS Total\_Loan\_Applications,

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

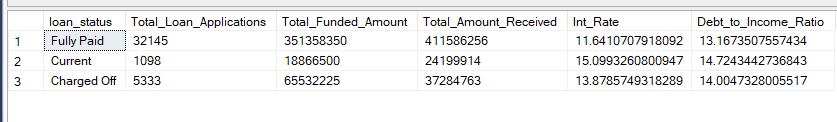
SUM(total\_payment) AS Total\_Amount\_Received,

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

AVG(dti\*100) AS Debt\_to\_Income\_Ratio

FROM financial\_loan

GROUP BY(loan\_status)

****

SELECT

loan\_status,

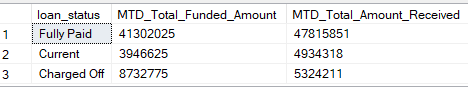
SUM(loan\_amount) AS MTD\_Total\_Funded\_Amount,

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

FROM financial\_loan

WHERE MONTH(issue\_date) = 12

GROUP BY(loan\_status)

****

1. **BANK LOAN REPORT | OVERVIEW**

**MONTH**

SELECT

MONTH(issue\_date) AS Month\_Number,

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

COUNT(id) AS Total\_Loan\_Applications,

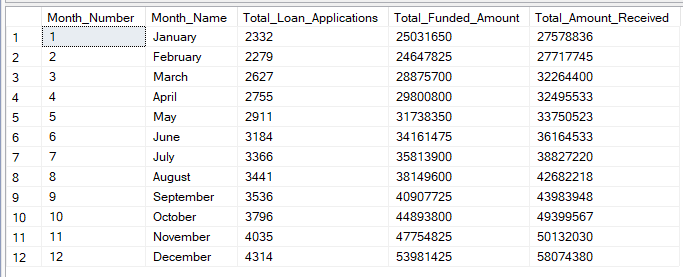
SUM(loan\_amount) AS Total\_Funded\_Amount,

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

FROM financial\_loan

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,

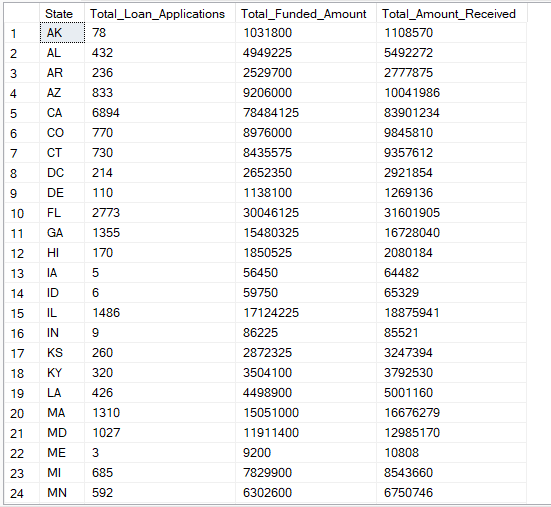
SUM(loan\_amount) AS Total\_Funded\_Amount,

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

FROM financial\_loan

GROUP BY address\_state

ORDER BY address\_state

****

**TERM**

SELECT

term as Term,

COUNT(id) AS Total\_Loan\_Application,

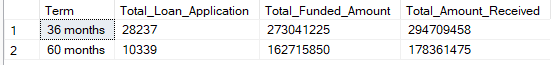
SUM(loan\_amount) AS Total\_Funded\_Amount,

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

FROM financial\_loan

GROUP BY term

ORDER BY term

****

**EMPLOYEE LENGTH**

SELECT

emp\_length AS Employee\_Length,

COUNT(id) AS Total\_Loan\_Application,

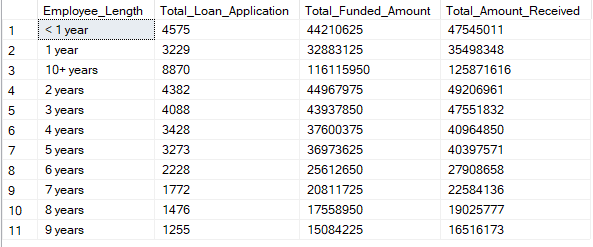
SUM(loan\_amount) AS Total\_Funded\_Amount,

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

FROM financial\_loan

GROUP BY emp\_length

ORDER BY emp\_length

****

**PURPOSE**

SELECT

purpose AS Purpose,

COUNT(id) AS Total\_Loan\_Application,

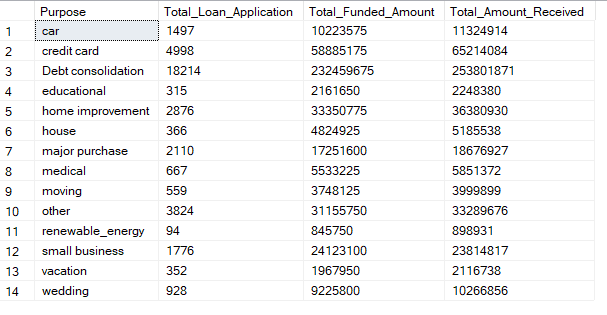
SUM(loan\_amount) AS Total\_Funded\_Amount,

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

FROM financial\_loan

GROUP BY purpose

ORDER BY purpose

****

**HOME OWNERSHIP**

SELECT

home\_ownership AS Home\_Ownership,

COUNT(id) AS Total\_Loan\_Application,

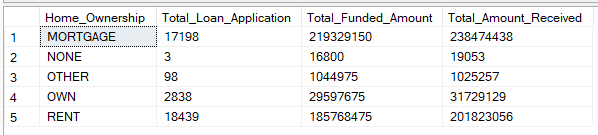
SUM(loan\_amount) AS Total\_Funded\_Amount,

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

FROM financial\_loan

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 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,*

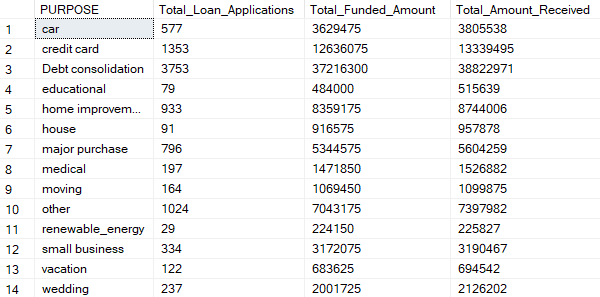
*SUM(total\_payment) AS Total\_Amount\_Received*

*FROM bank\_loan\_data*

*WHERE grade = 'A'*

*GROUP BY purpose*

*ORDER BY purpose*

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