



Credit Card

weekly status report

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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.

Download Data

Github:

[**https://github.com/rishabhnmishra/Credit_Card_Financial_Dashboard**](https://github.com/rishabhnmishra/Credit_Card_Financial_Dashboard)

Google Drive:

Import Data to SQL Database

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

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 35% & 3.39%
- Customer count increased by 12.80%

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%

Credit card financial dashboard using Power BI

- Developed an interactive dashboard using transaction and customer data from a SQL database, to provide real-time insights.
- Streamlined data processing & analysis to monitor key performance metrics and trends.
- Shared actionable insights with stakeholders based on dashboard findings to support decision-making processes.

Dashboard Screen Shot (1)

Credit Card Transaction Report

Revenue

56.5M

Interest

8.0M

Transactions
Amount

45.5M

Transactions
Count

667.2K

week_start_date

1/1/2020 12/31/2020

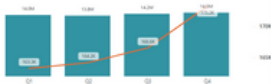


F

M

QTR Revenue and total trans count

Sum of Revenue Sum of total trans count



Blue

Gold

Platinum

Silver

card_category	Sum of Revenue	Sum of total trans count	Sum of interest earned
Blue	47188612	37840749	6614173
Silver	5659109	4647596	821923
Gold	2533682	2091362	384755
Platinum	1135608	953314	161629
Total	56517011	45533021	7982480

Revenue by Expenditure type



Revenue by Customer Education



Revenue by Customer Job



Revenue by Card category



Revenue by Use Chip



Dashboard Screen Shot (2)





Thank You