

# Credit Card

weekly status report

**Israk Jahan Samir**

# Contents

1. Project objective
2. Data from SQL
3. Data processing & DAX
4. Dashboard & insights
5. Export & share project

# 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/samirsivan/Credit\\_Card\\_Financial\\_Dashboard\\_PowerBI](https://github.com/samirsivan/Credit_Card_Financial_Dashboard_PowerBI)

# 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

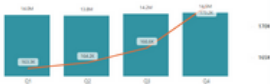


F

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**