Credit Card Weekly Status Report

Steps involved:

1) Project Objective

2) Data from SQL

3) Data Preprocessing and DAX

4) Dashboard and Insights

5) Export & Share Projects

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.

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, "High", "unknown")

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_Reveneue = 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:

- Revenue increased by 28.8%
- 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%