BANK LOAN REPORT (QUERY DOCUMENT)

KPI's:

Total Loan Applications

```
SELECT COUNT(id) as Total_Applications FROM financial_loan
```

MTD Loan Applications

```
SELECT COUNT(id) AS Total_Applications FROM financial_loan
WHERE MONTH(issue_date) = 12 and year(issue_date) =2021
```

PMTD Loan Applications

```
SELECT COUNT(id) AS Total_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 Total_Funded_Amount FROM financial_loan

WHERE MONTH(issue_date) = 12
```

PMTD Total Funded Amount

```
SELECT SUM(loan_amount) AS Total_Funded_Amount FROM financial_loan

WHERE MONTH(issue_date) = 11
```

Total Amount Received

```
SELECT SUM(total_payment) AS Total_Amount_Collected FROM financial_loan
```

MTD Total Amount Received

```
SELECT SUM(total_payment) AS Total_Amount_Collected FROM financial_loan

WHERE MONTH(issue_date) = 12
```

PMTD Total Amount Received

```
SELECT SUM(total_payment) AS Total_Amount_Collected FROM financial_loan

WHERE MONTH(issue_date)=11
```

Average Interest Rate

```
SELECT round(AVG(int_rate)*100,2) AS Avg_Int_Rate FROM financial_loan
```

MTD Average Interest

```
SELECT AVG(int_rate)*100 AS MTD_Avg_Int_Rate FROM bank_loan_data

WHERE MONTH(issue_date) = 12
```

PMTD Average Interest

```
SELECT ROUND(AVG(int_rate)*100,2) AS PMTD_Avg_Int_Rate FROM financial_loan

WHERE MONTH(issue_date) = 11
```

Avg DTI

```
SELECT ROUND(AVG(dti)*100,2) AS Avg_DTI FROM financial_loan
where year(issue_date)=2021
```

MTD Avg DTI

```
SELECT ROUND(AVG(dti)*100,2) AS MTD_Avg_DTI FROM financial_loan
WHERE MONTH(issue_date) = 12 and year(issue_date)=2021
```

PMTD Avg DTI

```
SELECT ROUND(AVG(dti)*100,2) AS PMTD_Avg_DTI FROM financial_loan

WHERE MONTH(issue_date) = 11 AND YEAR(issue_date)=2021
```

GOOD LOAN ISSUED

Good Loan Percentage

```
SELECT
 ROUND(((COUNT(CASE WHEN loan_status = 'Fully Paid' OR loan_status = 'Current' THEN id END) *
100.0) / COUNT(id)),0) 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 bank_loan_data

WHERE loan_status = 'Fully Paid' OR loan_status = 'Current'
```

Good Loan Amount Received

```
SELECT SUM(total_payment) AS Good_Loan_amount_received FROM bank_loan_data

WHERE loan_status = 'Fully Paid' OR loan_status = 'Current'
```

BAD LOAN ISSUED

Bad Loan Percentage

```
SELECT
   ROUND((COUNT(CASE WHEN loan_status = 'Charged Off' THEN id END)* 100.0) /
         COUNT(id),2) AS Bad_Loan_Percentage

FROM financial_loan
```

Bad Loan Applications

```
SELECT COUNT(id) AS Bad_Loan_Applications 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 Totala_Loan_applications,
      SUM(total_payment) AS Total_Amount_Received,
      SUM(loan_amount) AS Total_Funded_Amount,
      AVG(int_rate * 100) AS Interest_Rate,
      AVG(dti * 100) AS DTI
   FROM financial_loan
   GROUP BY loan_status


SELECT
        loan_status,
        SUM(total_payment) AS MTD_Total_Amount_Received,
        SUM(loan_amount) AS MTD_Total_Funded_Amount
FROM financial_loan
WHERE MONTH(issue_date) = 12
GROUP BY loan_status
```

A. BANK LOAN REPORT | OVERVIEW

MONTH

```
SELECT
        MONTH(issue_date) AS Month_Munber,
        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_Applications,
        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_Applications,
        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_Applications,
        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_Applications,
        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
```

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 financial_loan
WHERE grade = 'A'
GROUP BY purpose
ORDER BY purpose
```