**Project : Bank Loan Report**

**Domain : Financial services**

**QUERY DOCUMENT**

**KPI’s :**

**1.Total Loan Applications**

SELECT COUNT(id) AS Total\_Applications FROM bank\_loan\_data



**2. MTD Loan Applications**

SELECT COUNT(id) AS Total\_Applications FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 12



**3.PMTD Loan Applications**

SELECT COUNT(id) AS Total\_Applications FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 11



**4.Total Funded Amount**

SELECT SUM(loan\_amount) AS Total\_Funded\_Amount FROM bank\_loan\_data



**5.MTD Total Funded Amount**

SELECT SUM(loan\_amount) AS Total\_Funded\_Amount FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 12



**6.PMTD Total Funded Amount**

SELECT SUM(loan\_amount) AS Total\_Funded\_Amount FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 11



**7.Total Amount Received**

SELECT SUM(total\_payment) AS Total\_Amount\_Collected FROM bank\_loan\_data



**8.MTD Total Amount Received**

SELECT SUM(total\_payment) AS Total\_Amount\_Collected FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 12



**9.PMTD Total Amount Received**

SELECT SUM(total\_payment) AS Total\_Amount\_Collected FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 11



**10.Average Interest Rate**

SELECT AVG(int\_rate)\*100 AS Avg\_Int\_Rate FROM bank\_loan\_data



**11.MTD Average Interest**

SELECT AVG(int\_rate)\*100 AS MTD\_Avg\_Int\_Rate FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 12



**12.PMTD Average Interest**

SELECT AVG(int\_rate)\*100 AS PMTD\_Avg\_Int\_Rate FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 11



**13.Avg DTI**

SELECT AVG(dti)\*100 AS Avg\_DTI FROM bank\_loan\_data



**14.MTD Avg DTI**

SELECT AVG(dti)\*100 AS MTD\_Avg\_DTI FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 12



**15.PMTD Avg DTI**

SELECT AVG(dti)\*100 AS PMTD\_Avg\_DTI FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 11



**GOOD LOAN ISSUED**

**1.Good Loan Percentage**

SELECT

    (COUNT(CASE WHEN loan\_status = 'Fully Paid' OR loan\_status = 'Current' THEN id END) \* 100.0) /

COUNT(id) AS Good\_Loan\_Percentage

FROM bank\_loan\_data

****

**2.Good Loan Applications**

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

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

****

**3.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'

****

**4.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**

**1.Bad Loan Percentage**

SELECT

    (COUNT(CASE WHEN loan\_status = 'Charged Off' THEN id END) \* 100.0) /

COUNT(id) AS Bad\_Loan\_Percentage

FROM bank\_loan\_data

****

**2.Bad Loan Applications**

SELECT COUNT(id) AS Bad\_Loan\_Applications FROM bank\_loan\_data

WHERE loan\_status = 'Charged Off'

****

**3.Bad Loan Funded Amount**

SELECT SUM(loan\_amount) AS Bad\_Loan\_Funded\_amount FROM bank\_loan\_data

WHERE loan\_status = 'Charged Off'

****

**4.Bad Loan Amount Received**

SELECT SUM(total\_payment) AS Bad\_Loan\_amount\_received FROM bank\_loan\_data

WHERE loan\_status = 'Charged Off'

****

**LOAN STATUS**

SELECT

        loan\_status,

        COUNT(id) AS LoanCount,

        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

        bank\_loan\_data

    GROUP BY

        loan\_status

****

SELECT

loan\_status,

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

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

FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 12

GROUP BY loan\_status

****

**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 bank\_loan\_data

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 bank\_loan\_data

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 bank\_loan\_data

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 bank\_loan\_data

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 bank\_loan\_data

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 bank\_loan\_data

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 bank\_loan\_data*

*WHERE grade = 'A'*

*GROUP BY purpose*

*ORDER BY purpose*