ANALYSIS PROJECT

Project Holder: Sowmya. Pokuri

Project Name: Bank Loan Report.

Tools using: SQL, TABLEAU.

Platforms Required: SQL Server Management,TABLEAU Public.

Data Set: Bank Loan Data.

The goal of doing operations in both platforms is for getting the same endpoint result of the data-set in both platforms. May tableau the have the less efficiency while evaluating the visualization that’s why we using the SQL to compare the outcomes in both platforms to avoid the garbage values and to showcase the Accurate output in SQL.

**TABLEAU DASHBOARDS:**

* SUMMARY DASHBOARD
* OVERVIEW DASHBOARD
* DETAILS DASHBOARD

**IN SUMMARY DASHBOARD:**

**KEY PERFORMANCE INDICATORS (KPI’S) :**

we also should assume **Month to date** and **Month on Month** in KPI’s

1. Total loan Applications
2. Total Funded Amount
3. Total Amount Received
4. Average Interest Rate
5. Average Debt To Income(DTI)

**GOOD LOAN VERSES BAD LOAN:**

Good Loans and Bad Loans based on specific loan status criteria.

GOOD KPI’S :

1. Good Loan Application Percentage
2. Good Loan Application
3. Good Funded Amount
4. Good Loan Amount Received

BAD KPI’S :

1. Bad Loan Application Percentage
2. Bad Loan Application
3. Bad Funded Amount
4. Bad Loan Amount Received

LOAN STATUS GRADE VIEW:

In order to gain a comprehensive overview of our lending operations and monitor the performance of loans, we aim to create a grid view report categorized by 'Loan Status.' This report will serve as a valuable tool for analyzing and understanding the key indicators associated with different loan statuses. By providing insights into metrics such as 'Total Loan Applications,' 'Total Funded Amount,' 'Total Amount Received,' 'Month-to-Date (MTD) Funded Amount,' 'MTD Amount Received,' 'Average Interest Rate,' and 'Average Debt-to-Income Ratio (DTI),' this grid view will empower us to make data-driven decisions and assess the health of our loan portfolio.

IN OVERVIEW DASHBOARD:

The Metrics are **Total Loan Application,Total Funded Amount and Total Amount Received** are Used to create Charts in OverView Dashboard.

1. Monthly trends by issue Date(Line Chart)
2. Regional analysis by State(Filled map)
3. Loan Term Analysis(Donut Chart)
4. Employee Length(Bar chart)
5. Purpose(Bar chart)
6. Home Ownership(Tree Map)

IN DETAILS DASHBOARD:

In our Bank Loan Report project, we recognize the need for a comprehensive 'Details Dashboard' that provides a consolidated view of all the essential information within our loan data. This Details Dashboard aims to offer a holistic snapshot of key loan-related metrics and data points, enabling users to access critical information efficiently.