Credit Card Financial Dashboard

Weekly Report Summary

Project Objective

Develop a credit card dashboard to monitor key metrics.
Enable real-time analysis of financial data.
Support data-driven decision-making.

Steps to Import Data into SQL

1. Prepare CSV files with customer and transaction data.
2. Create appropriate tables in the SQL database.
3. Import the CSV data into SQL tables.

DAX Queries for Data Modeling

- Create AgeGroup and IncomeGroup using SWITCH statements.
- Calculate revenue as a combination of fees, transactions, and interest.
- Use WEEKNUM to identify week numbers.
- Calculate current and previous week revenue using CALCULATE + FILTER.

Dashboard Insights

- Revenue increased by 28.8% (Week over Week).
- Customer count and transactions increased significantly.
- YTD Revenue: 57M | Interest: 8M | Transactions: 46M.
- Top states: TX, NY, CA – 68% contribution.
- Activation Rate: 57.5% | Delinquency Rate: 6.06%.

Resume Line Example

- Developed a Power BI dashboard using SQL data to provide real-time credit card insights.
- Automated DAX-based metrics to track performance and revenue trends.
- Enabled stakeholder decision-making through visual analytics.