CREDIT CARD

WEEKLY STATUS REPORT

Project Work Flow

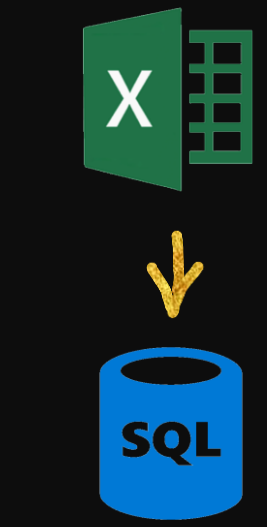
1. Project objective
2. Import Data from SQL
3. Data processing & DAX
4. Dashboard Making
5. Collecting Insights

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

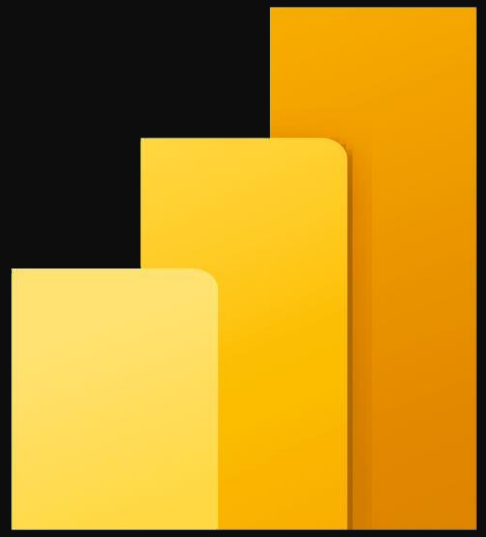


Data Output	Messages	Notifications
COPY 10108		
Query returned successfully in 82 msec.		

NOTE: Find all SQL queries & project data- https://github.com/swapnil2468/Credit_Card_Financial_Dashboard

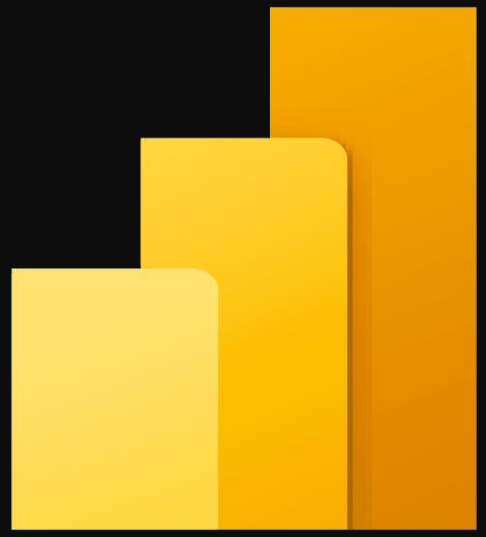
SQL Queries

```
CREATE DATABASE ccdb;

-- 1. Create cc_detail table

    CREATE TABLE cc_detail (
           Client_Num INT,
           Card_Category VARCHAR(20),
           Annual_Fees INT,
           Activation_30_Days INT,
           Customer_Acq_Cost INT,
           Week_Start_Date DATE,
           Week_Num VARCHAR(20),
           Qtr VARCHAR(10),
           current_year INT,
           Credit_Limit DECIMAL(10,2),
           Total_Revolving_Bal INT,
           Total_Trans_Amt INT,
           Total_Trans_Ct INT,
           Avg_Utilization_Ratio DECIMAL(10,3),
           Use_Chip VARCHAR(10),
           Exp_Type VARCHAR(50),
           Interest_Earned DECIMAL(10,3),
           Delinquent_Acc VARCHAR(5)
    );
```



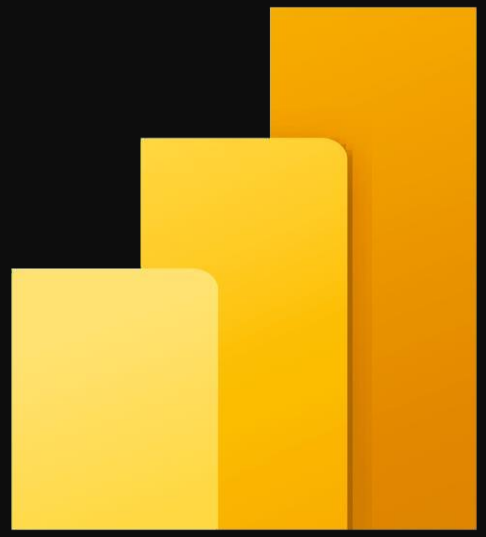
SQL Queries

```sql
-- 2. Create cc_detail table

CREATE TABLE cust_detail (
    Client_Num INT,
    Customer_Age INT,
    Gender VARCHAR(5),
    Dependent_Count INT,
    Education_Level VARCHAR(50),
    Marital_Status VARCHAR(20),
    State_cd VARCHAR(50),
    Zipcode VARCHAR(20),
    Car_Owner VARCHAR(5),
    House_Owner VARCHAR(5),
    Personal_Loan VARCHAR(5),
    Contact VARCHAR(50),
    Customer_Job VARCHAR(50),
    Income INT,
    Cust_Satisfaction_Score INT
);
```



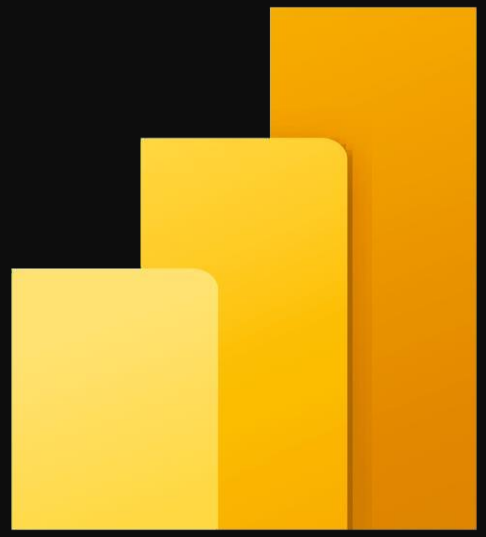
SQL Queries

```
-- 3. Copy csv data into SQL

COPY cc_detail
FROM 'C:\Users\91987\Desktop\DATA ANALYTICS PROJECTS\Power Bi
Project\Credit Card Dashboard\Assets\credit_card.csv'
DELIMITER ','
CSV HEADER;

COPY cust_detail
FROM 'C:\Users\91987\Desktop\DATA ANALYTICS PROJECTS\Power Bi
Project\Credit Card Dashboard\Assets\customer.csv'
DELIMITER ','
CSV HEADER;
```



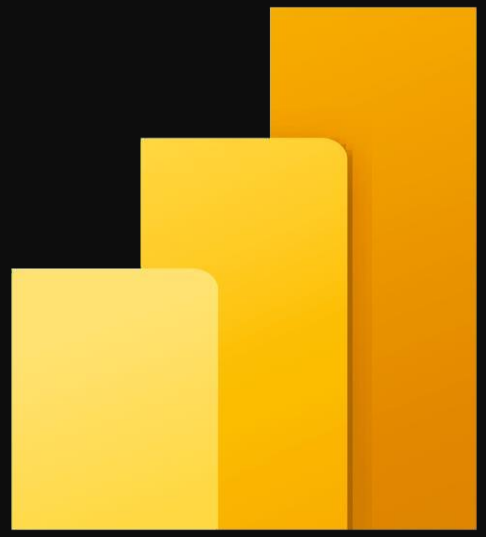
SQL Queries

```
-- 4. Insert additional data into SQL, using same COPY function

-- copy additional data (week-53) in cc_detail table

COPY cc_detail
FROM 'C:\Users\91987\Desktop\DATA ANALYTICS PROJECTS\Power Bi
Project\Credit Card Dashboard\Assets\cc_add.csv'
DELIMITER ','
CSV HEADER;

-- copy additional data (week-53) in cust_detail table
COPY cust_detail
FROM 'C:\Users\91987\Desktop\DATA ANALYTICS PROJECTS\Power Bi
Project\Credit Card Dashboard\Assets\cust_add.csv'
DELIMITER ','
CSV HEADER;
```



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, "Med",
     'public cust_detail'[income] >= 70000, "High",
     "unknown"
)
```



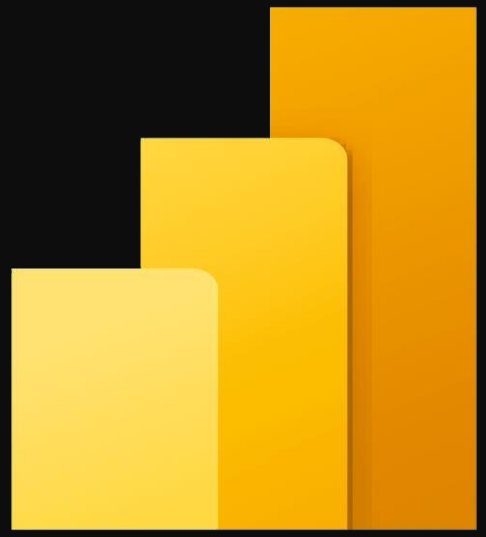
DAX Queries

week_num2 = WEEKNUM('public cc_detail'[week_start_date])

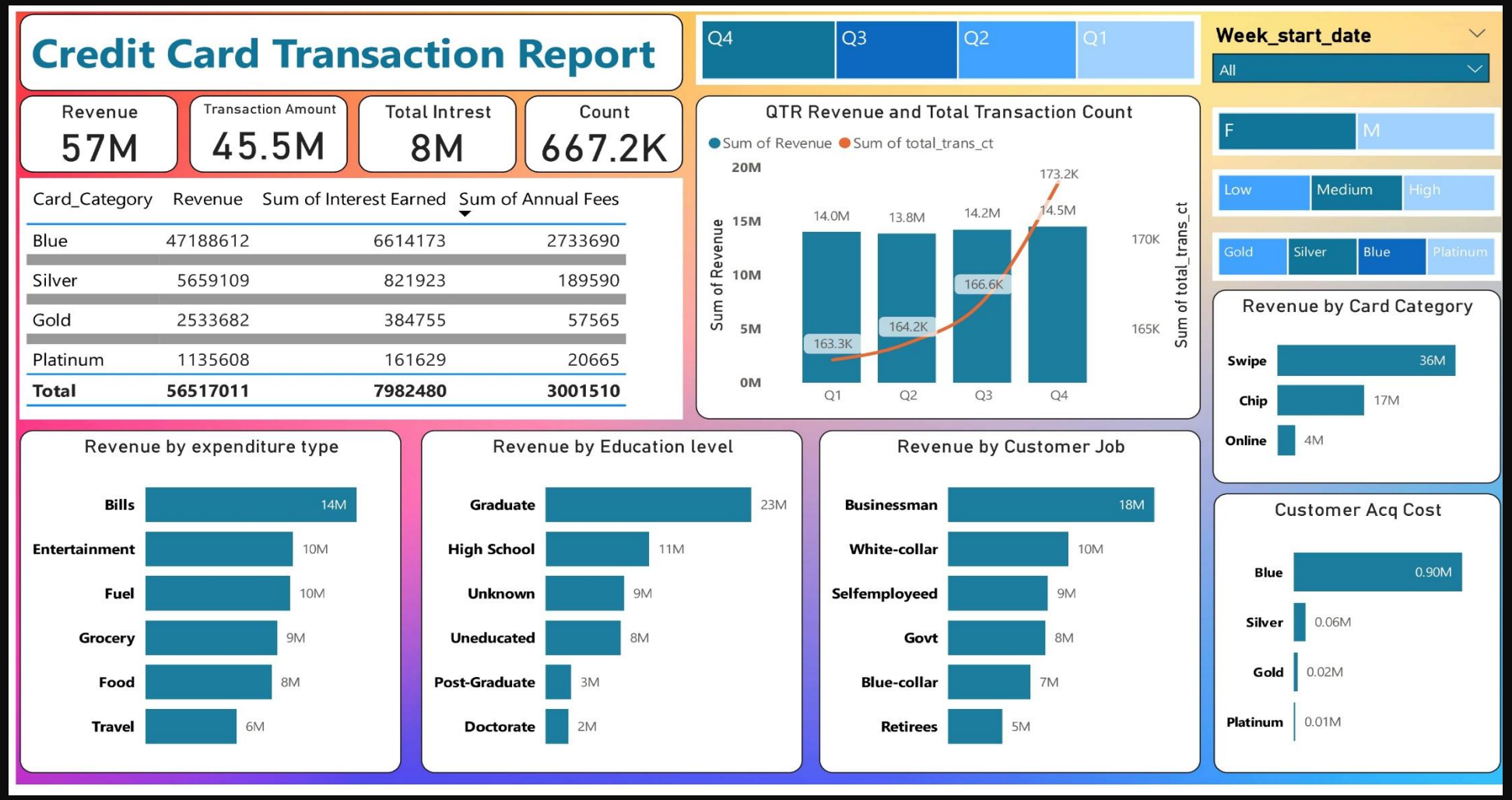
Revenue = 'public cc_detail'[annual_fees] + 'public cc_detail'[total_trans_amt] + 'public cc_detail'[interest_earned]

Current_week_Reveneue = 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))



Power BI Dashboard



Power BI Dashboard

Project Insights- Week 53 (31st Dec)

WoW change:

- Revenue increased by 28.8%,
- Total Transaction Amt & Count increased by 35% & 3.2%
- Customer count increased by 12.8%

Overview YTD:

- 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%