



CREDIT CARD

WEEKLY STATUS REPORT

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Introducing

This presentation presents the insights and key performance indicators (KPIs) for the "Credit Card Financial Weekly Dashboard" for Week 02, ending on 08st January. The analysis focuses on the week-over-week (WoW) changes and a year-to-date (YTD) overview of the credit card transactions and customer behaviors.



Project Objective

The aim is to create a comprehensive weekly credit card dashboard that provides real-time insights into key performance metrics and trends. This will enable stakeholders to monitor, analyze, and optimize credit card operations, supporting data-driven decisions and improving overall efficiency.





Build With:

- 1] Power BI Desktop
- 2] Excel

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_Revenue = CALCULATE( SUM('public cc_detail'[Revenue]), FILTER( ALL('public
cc_detail'), 'public cc_detail'[week_num2] = MAX('public cc_detail'[week_num2])))

Previous_week_Revenue = CALCULATE( SUM('public cc_detail'[Revenue]), FILTER( ALL('public
cc_detail'), 'public cc_detail'[week_num2] = MAX('public cc_detail'[week_num2])-1)
)
```



Project Insights- Week 2 (08 January)

WoW change:

- Revenue increased by 1.2%,
- Total Transaction Amt & Count increased by 1.90% & 1.93%
- Customer count increased by 1.93% Overview

YTD:

- Overall revenue is 55.3M
- Total interest is 7.8M
- Total transaction amount is 44.5M
- Male customers are contributing more in revenue 30M, female 25M
- Blue & Silver credit card are contributing to 93% of overall transactions
- TX, NY & CA is contributing to 68.99%
- Overall Activation rate is 57.47%
- Overall Delinquent rate is 8.21%

Conclusion

The dashboard offers key insights into credit card transactions and customer data. The Transaction Report highlights financial performance, while the Customer Report reveals behavior and engagement trends. Together, these insights help optimize operations and support data-driven decision-making.

