

CREDIT CARD

WEEKLY STATUS REPORT

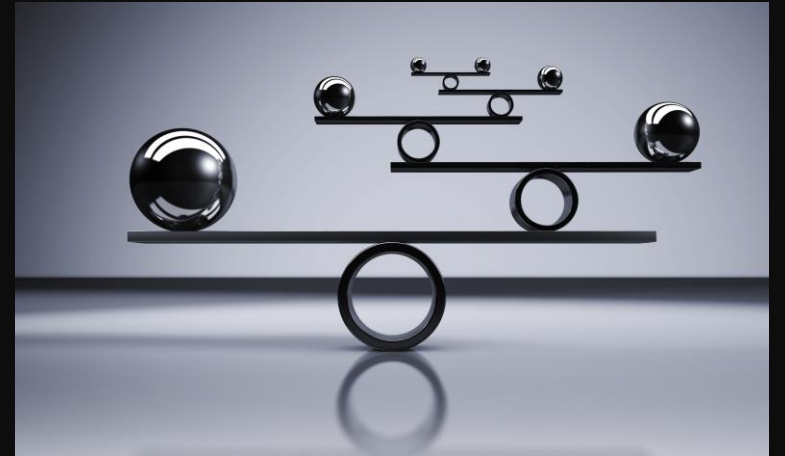
TOPICS

- 1. Project objective
- 2. Data from SQL
- 3. Data processing & DAX
- 4. Dashboard & insights
- 5. Export & share project



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.





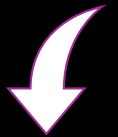
Download Data

GitHub:

https://github.com/thenameiskuldeep/Credit_Card- Financial_Dashboard

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.



DAX Queries



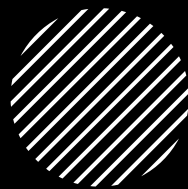
- **AgeGroup** = SWITCH(TRUE(), 'public
cust_detail'[customer_age] < 30, "20-30", 'public
cust_detail'[customer_age] >= 30 && 'public
cust_detail'[customer_age] < 40, "30-40", 'public
cust_detail'[customer_age] >= 40 && 'public
cust_detail'[customer_age] < 50, "40-50", 'public
cust_detail'[customer_age] >= 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, "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 53 (31st Dec)

- **WoW change:**
 - Revenue increased by 28.8%,
 - Total Transaction Amt & Count increased by 23% & 16%
 - Customer count increased by xx%

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%

**Efforts By
Kuldeep Upadhyay**

**Special thanks to
Rishabh Mishra**

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