**CHASE BANK LOAN REPORT | SUMMARY**

**KPI’s:**

Total Loan Applications

SELECT COUNT(id) AS Total\_Loan\_Applications FROM bank\_loan\_data



MTD Loan Applications

SELECT COUNT(id) AS MTD\_Total\_Loan\_Applications FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 12 AND YEAR(issue\_date) = 2021



PMTD Loan Applications

SELECT COUNT(id) AS PMTD\_Total\_Loan\_Applications FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 11 AND YEAR(issue\_date) = 2021



Total Funded Amount

SELECT SUM(loan\_amount) AS Total\_Funded\_Amount FROM bank\_loan\_data



MTD Total Funded Amount

SELECT SUM(loan\_amount) AS MTD\_Total\_Funded\_Amount FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 12 AND YEAR(issue\_date) = 2021



PMTD Total Funded Amount

SELECT SUM(loan\_amount) AS PMTD\_Total\_Funded\_Amount FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 11 AND YEAR(issue\_date) = 2021



Total Amount Received

SELECT SUM(total\_payment) AS Total\_Amount\_Received FROM bank\_loan\_data

MTD Total Amount Received

SELECT SUM(total\_payment) AS MTD\_Total\_Amount\_Received FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 12 AND YEAR(issue\_date) = 2021



PMTD Total Amount Received

SELECT SUM(total\_payment) AS PMTD\_Total\_Amount\_Received FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 11 AND YEAR(issue\_date) = 2021



Average Interest Rate

SELECT ROUND(AVG(int\_rate), 4) \* 100 AS Avg\_Interest\_Rate FROM bank\_loan\_data



MTD Average Interest Rate

SELECT ROUND(AVG(int\_rate), 4) \* 100 AS MTD\_Avg\_Interest\_Rate FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 12 AND YEAR(issue\_date) = 2021



PMTD Average Interest Rate

SELECT ROUND(AVG(int\_rate), 4) \* 100 AS PMTD\_Avg\_Interest\_Rate FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 11 AND YEAR(issue\_date) = 2021



Average Debt-to-Income Ratio (DTI)

SELECT ROUND(AVG(dti),4) \*100 AS Avg\_DTI FROM bank\_loan\_data



MTD Average Debt-to-Income Ratio (DTI)

SELECT ROUND(AVG(dti),4) \*100 AS MTD\_Avg\_DTI FROM bank\_loan\_data

WHERE MONTH(issue\_date)= 12 AND YEAR(issue\_date) = 2021



PMTD Average Debt-to-Income Ratio (DTI)

SELECT ROUND(AVG(dti),4) \*100 AS PMTD\_Avg\_DTI FROM bank\_loan\_data

WHERE MONTH(issue\_date)= 11 AND YEAR(issue\_date) = 2021

**Good Loan:**

Good Loan Percentage

SELECT

(COUNT(CASE WHEN loan\_status = 'Fully Paid' OR loan\_status = 'Current' THEN id END)\* 100)

/

COUNT(id) AS Good\_loan\_percentage

FROM bank\_loan\_data



Good Loan Applications

SELECT COUNT(id) AS Good\_Loan\_Applications FROM bank\_loan\_data

WHERE loan\_status = 'Fully Paid' OR loan\_status = 'Current'



Good Loan Funded Amount

SELECT SUM(loan\_amount) AS Good\_Loan\_Funded\_Amount FROM bank\_loan\_data

WHERE loan\_status = 'Fully Paid' OR loan\_status = 'Current'



Good Loan Total Received Amount

SELECT SUM(total\_payment) AS Good\_Loan\_Received\_Amount FROM bank\_loan\_data

WHERE loan\_status = 'Fully Paid' OR loan\_status = 'Current'



**Bad Loan:**

Bad Loan Percentage

SELECT

(COUNT(CASE WHEN loan\_status = 'Charged Off' THEN id END) \* 100.0)

/

COUNT(id) AS Bad\_loan\_percentage

FROM bank\_loan\_data

****

Bad Loan Applications

SELECT COUNT(id) AS Bad\_Loan\_Applications FROM bank\_loan\_data

WHERE loan\_status = 'Charged Off'

****

Bad Loan Funded Amount

SELECT SUM(loan\_amount) AS Bad\_Loan\_Funded\_Amount FROM bank\_loan\_data

WHERE loan\_status = 'Charged Off'



Bad Loan Total Received Amount

SELECT SUM(total\_payment) AS Bad\_Loan\_Received\_Amount FROM bank\_loan\_data

WHERE loan\_status = 'Charged Off'

****

**Loan Status:**

SELECT

loan\_status,

COUNT(id) AS Total\_Loan\_Applications,

SUM(total\_payment) AS Total\_Amount\_Received,

SUM(loan\_amount) AS Total\_Funded\_Amount,

AVG(int\_rate \* 100) AS Interest\_Rate,

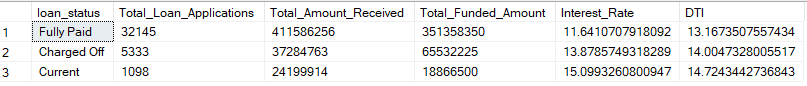
AVG(dti\*100) AS DTI

FROM

bank\_loan\_data

GROUP BY

loan\_status

****

SELECT

loan\_status,

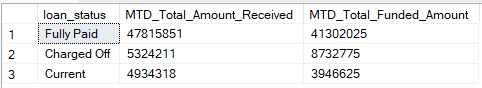
SUM(total\_payment) AS MTD\_Total\_Amount\_Received,

SUM(loan\_amount) AS MTD\_Total\_Funded\_Amount

FROM bank\_loan\_data

WHERE MONTH(issue\_date) = 12

GROUP BY loan\_status

****

**Monthly Trends by Issue Date:**

SELECT

MONTH(issue\_date),

DATENAME(MONTH, issue\_date) AS Month\_Name,

COUNT(id) AS Total\_Loan\_Applications,

SUM(loan\_amount) AS Total\_Funded\_Amount,

SUM(total\_payment) AS Total\_Received\_Amount

FROM

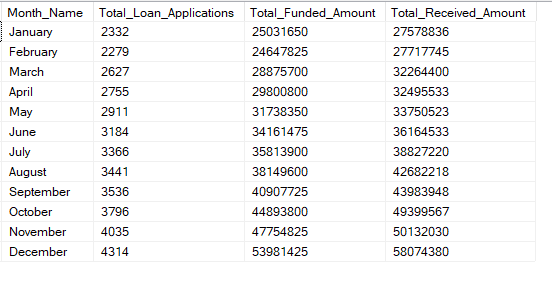
bank\_loan\_data

GROUP BY

MONTH(issue\_date), DATENAME(MONTH, issue\_date)

ORDER BY

MONTH(issue\_date)

****

**Regional Analysis by State:**

SELECT

address\_state,

COUNT(id) AS Total\_Loan\_Applications,

SUM(loan\_amount) AS Total\_Funded\_Amount,

SUM(total\_payment) AS Total\_Received\_Amount

FROM

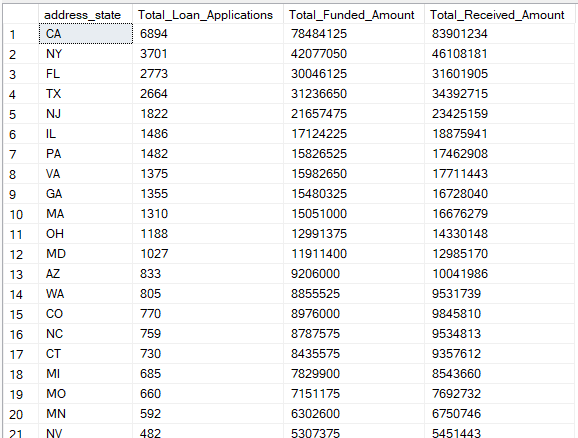
bank\_loan\_data

GROUP BY

address\_state

ORDER BY

COUNT(id) DESC

****

**Loan Term Analysis:**

SELECT

term,

COUNT(id) AS Total\_Loan\_Applications,

SUM(loan\_amount) AS Total\_Funded\_Amount,

SUM(total\_payment) AS Total\_Received\_Amount

FROM

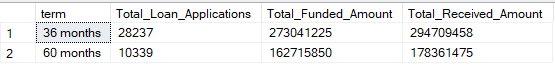
bank\_loan\_data

GROUP BY

term

ORDER BY

Term



**Employee Length Analysis:**

SELECT

emp\_length,

COUNT(id) AS Total\_Loan\_Applications,

SUM(loan\_amount) AS Total\_Funded\_Amount,

SUM(total\_payment) AS Total\_Received\_Amount

FROM

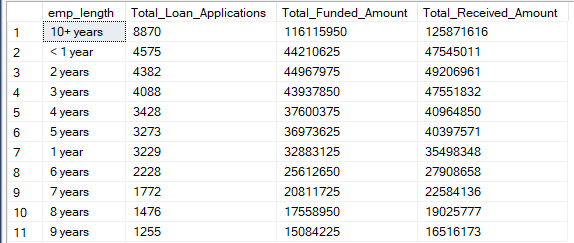
bank\_loan\_data

GROUP BY

emp\_length

ORDER BY

COUNT(id) DESC



**Loan Purpose Breakdown:**

SELECT

purpose,

COUNT(id) AS Total\_Loan\_Applications,

SUM(loan\_amount) AS Total\_Funded\_Amount,

SUM(total\_payment) AS Total\_Received\_Amount

FROM

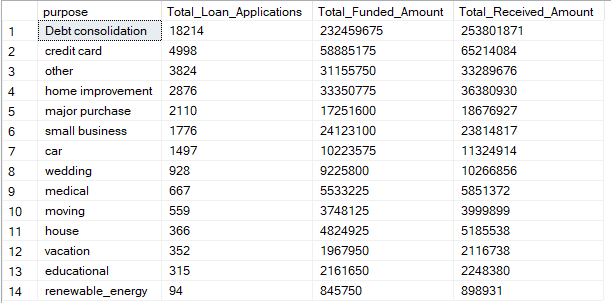
bank\_loan\_data

GROUP BY

purpose

ORDER BY

COUNT(id) DESC

****

**Home Ownership Analysis:**

SELECT

home\_ownership,

COUNT(id) AS Total\_Loan\_Applications,

SUM(loan\_amount) AS Total\_Funded\_Amount,

SUM(total\_payment) AS Total\_Received\_Amount

FROM

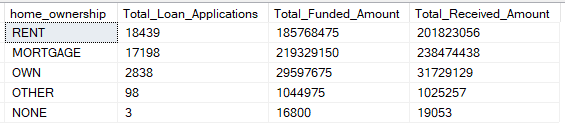
bank\_loan\_data

GROUP BY

home\_ownership

ORDER BY

COUNT(id) DESC

****