

FINOS

Fintech
Open Source
Foundation



FDC³

Quarterly Meeting
November 2019

Agenda

FDC3 in Production

Getting Ready for 1.1

Community Survey

We're Moving! (Github Orgs)

AOB

FDC3 in Production

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Demo - FactSet on FDC3

The screenshot displays a financial research application interface with three main components:

- Research Table:** A table listing research reports. The selected row is:

Date/Time	Identifier	Contributor	Headline (135)	Pgs
12:59 PM	CSCO, ...	UnivDatos Market In...	Europe Market Inshigh...	151
- Chart:** A line chart for Cisco Systems, Inc. (CSCO-USA) showing price movement from 2019 to November. The current price is 47.56, up 0.53 (1.14%). A volume bar chart is visible at the bottom.
- Blotter:** A table listing market activity for various companies. The selected row is Cisco Systems:

Name	Bid Size	Bid Price	Ask Size	Ask Price
Apple	##.##	##.##	##.##	##.##
Advanced Micro Devices	##.##	##.##	##.##	##.##
Amazon.com	##.##	##.##	##.##	##.##
Comcast Corporation	##.##	##.##	##.##	##.##
Cisco Systems	##.##	##.##	##.##	##.##
Facebook	##.##	##.##	##.##	##.##
Google	##.##	##.##	##.##	##.##
Intel Corporation	##.##	##.##	##.##	##.##

Getting Ready for 1.1

FDC3 1.1 Scope

Standardized FO types in Context Data

Channel APIs

Search extension to App Directory

<https://fdc3.finos.org/docs/next/fdc3-intro>

Context Data

Standard Schemas for:

- contact
- contactList
- context
- country
- instrument
- instrumentList
- organization
- portfolio
- position

<https://github.com/FDC3/FDC3/tree/master/src/context/schemas>

instrument Schema

```
1  {
2    "$schema": "http://json-schema.org/draft-07/schema#",
3    "$id": "https://fdc3.finos.org/schemas/1.0/instrument.schema",
4    "type": "object",
5    "allOf": [{ "$ref": "context.schema#/" }],
6    "properties": {
7      "type": { "enum": ["fdc3.instrument"] },
8      "id": {
9        "type": "object",
10       "properties": {
11         "BBG": { "type": "string" },
12         "CUSIP": { "type": "string" },
13         "FDS_ID": { "type": "string" },
14         "FIGI": { "type": "string" },
15         "ISIN": { "type": "string" },
16         "PERMID": { "type": "string" },
17         "RIC": { "type": "string" },
18         "SEDOL": { "type": "string" },
19         "ticker": { "type": "string" }
20       }
21     }
22   },
23   "required": ["id"]
24 }
```


instrumentList Schema

```
1  {
2    "$schema": "http://json-schema.org/draft-07/schema#",
3    "$id": "https://fdc3.finos.org/schemas/1.0/instrumentList.schema",
4    "type": "object",
5    "allOf": [{ "$ref": "context.schema#/" }],
6    "properties": {
7      "type": { "enum": ["fdc3.instrumentList"] },
8      "instruments": {
9        "type": "array",
10       "items": { "$ref": "instrument.schema#/" }
11     }
12   },
13   "required": ["instruments"]
14 }
```

Channel APIs

Support “color linking” and other context sharing patterns with FDC3

Allows a set of apps to share a stateful piece of data between them, and be alerted when it changes.

2 Types of channels:

- **system** - have a well understood identity - set by the desktop agent
- **app** - have dynamic identity defined by applications in the system

<https://fdc3.finos.org/docs/next/api/api-spec#context-channels>

Channel APIs Usage

Find a system channel

```
let allChannels = await channels.getSystemChannels();
```

```
let myChannel = allChannels.find(c=>???)
```

Broadcast on a channel

```
myChannel.broadcast(context);
```

Subscribe to a channel

```
let listener = myChannel.addBroadcastListener((c,e) => {some code});
```

Get/Create an App channel

```
let ac = await channels.getOrCreate("a-channel-name");
```

App Directory Search

Add search endpoint with POST method

Retrieves a list of applications based on submission of an Application model

<https://fdc3.finos.org/appd-spec#tag/Application/paths/~1v1~1search/post>

Community Survey

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FDC3 Adoption Survey

As we approach the end of the first year of the FDC3 1.0 standards, we're asking for feedback on

- How well FDC3 is addressing the needs of financial organizations

- How we can help you with adoption

- The health of the FDC3 contributor community

<https://www.surveymonkey.com/r/finosfdc3>

Call to Action: Case Studies

Following the survey, we will be working with FDC3 adopters to produce detailed case studies to document

- The business value of FDC3
- Adoption patterns
- Implementation challenges

If you are interested in participating in a case study, please reach out to fdc3-pmc@finos.org

We're moving!

(Github orgs)

What's happening?

The FDC3 Github projects will move from the FDC3 organization (<https://github.com/FDC3>) to the umbrella FINOS organization (<https://github.com/FINOS>).

This gives more visibility to FDC3 at the FINOS level and makes it easier for FDC3 to leverage organization level tooling implemented by FINOS.

New Tooling

GitHub Project

- Kanban board to help us track FDC3 activity, linked to issues and PRs
- Cross linking to other FINOS programs

GitHub Teams

- Organise FDC3 working groups into teams in GitHub
- Better permissioning and communication

GitHub Wiki

- Wiki information currently in Confluence will move to GitHub
- Everything in one place

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