FINOS

Fintech
Open Source
Foundation

FDC3

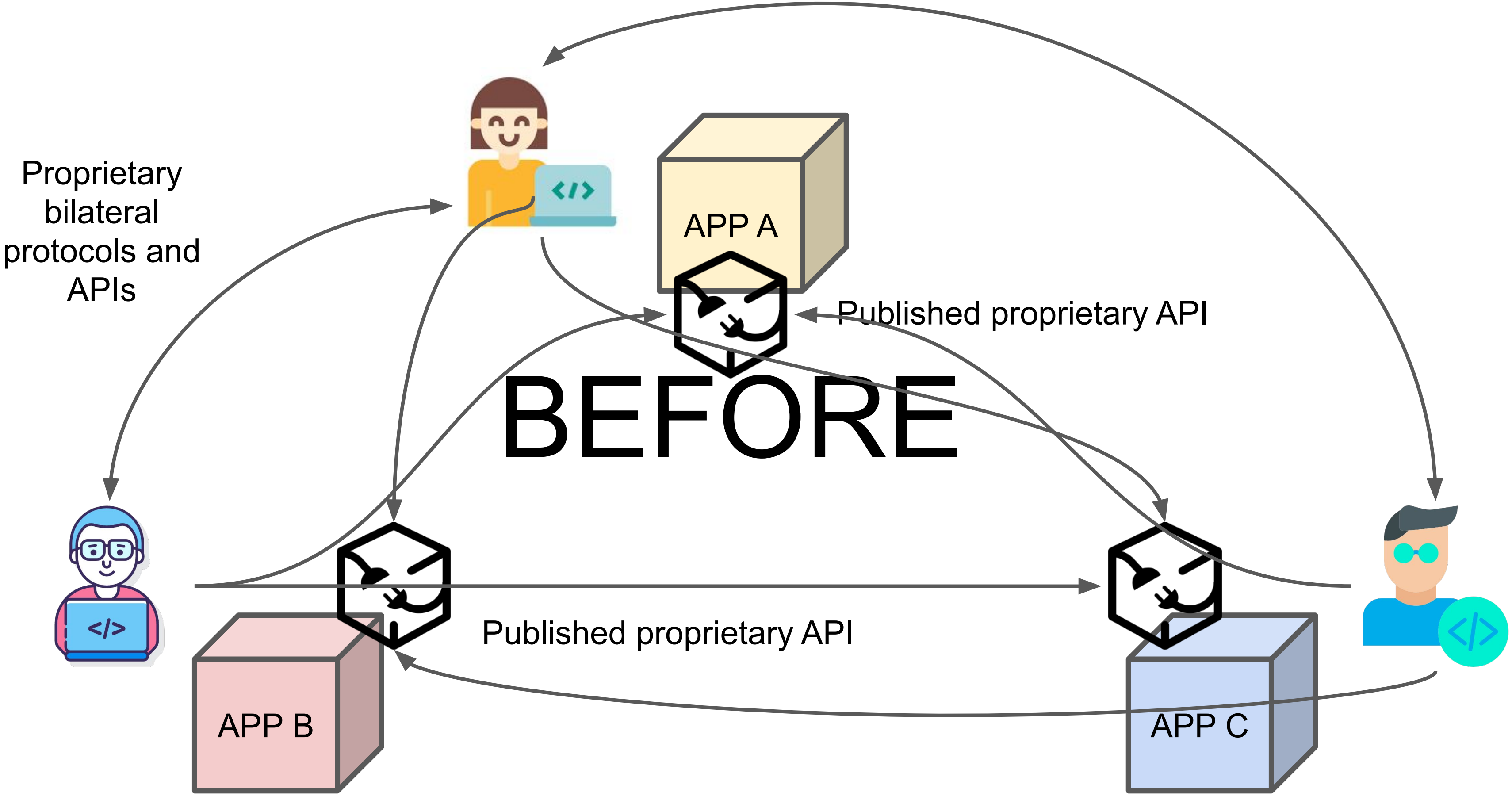
Open Source Collaboration with FDC3 1.1

Host - James McLeod
FINOS Director of Community

Presenter - Nick Kolba
FDC3 Project Lead and Chair

April 2020

why FDC3?



BEFORE

Proprietary bilateral protocols and APIs

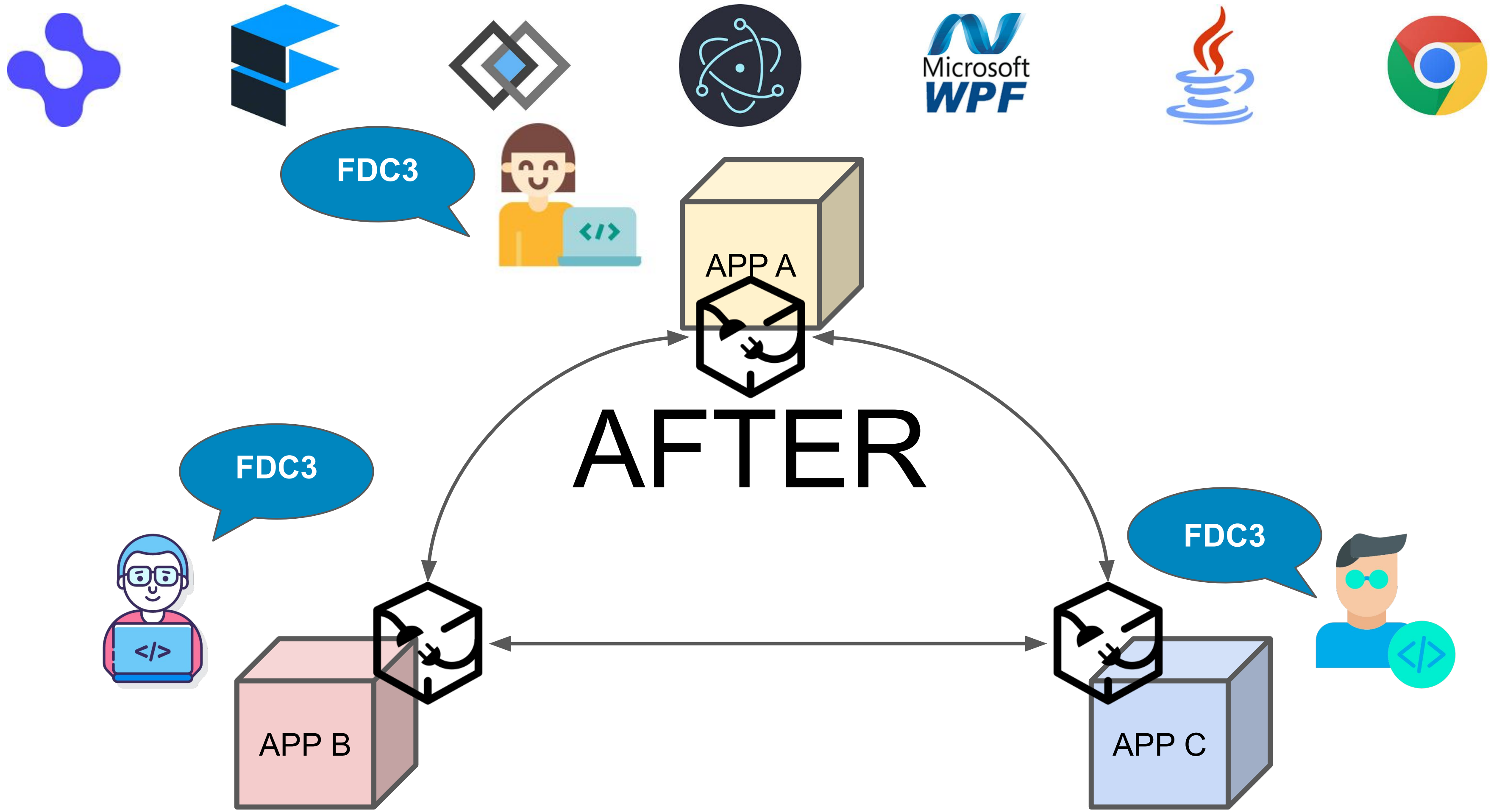
APP A

Published proprietary API

APP B

Published proprietary API

APP C



AFTER

a brief history

OpenFin founds FDC3

12 INITIAL PARTICIPANTS

1 SLIDE DECK

FDC3 FOUNDED

OCT 2017

FDC3 is contributed to FINOS

4 STANDARDS WGs

40+ PARTICIPANT FIRMS

FINOS CONTRIBUTION

MAY 2018

FDC3 1.0 standards are ratified

fdc3.finos.org **LAUNCHED**

100+ MEMBER COMMUNITY

10 CORE CONTRIBUTOR FIRMS

1.0 RELEASED

MAR 2019

FDC3 1.0 is put into production by leading financial firms

FACTSET

J.P.Morgan

+

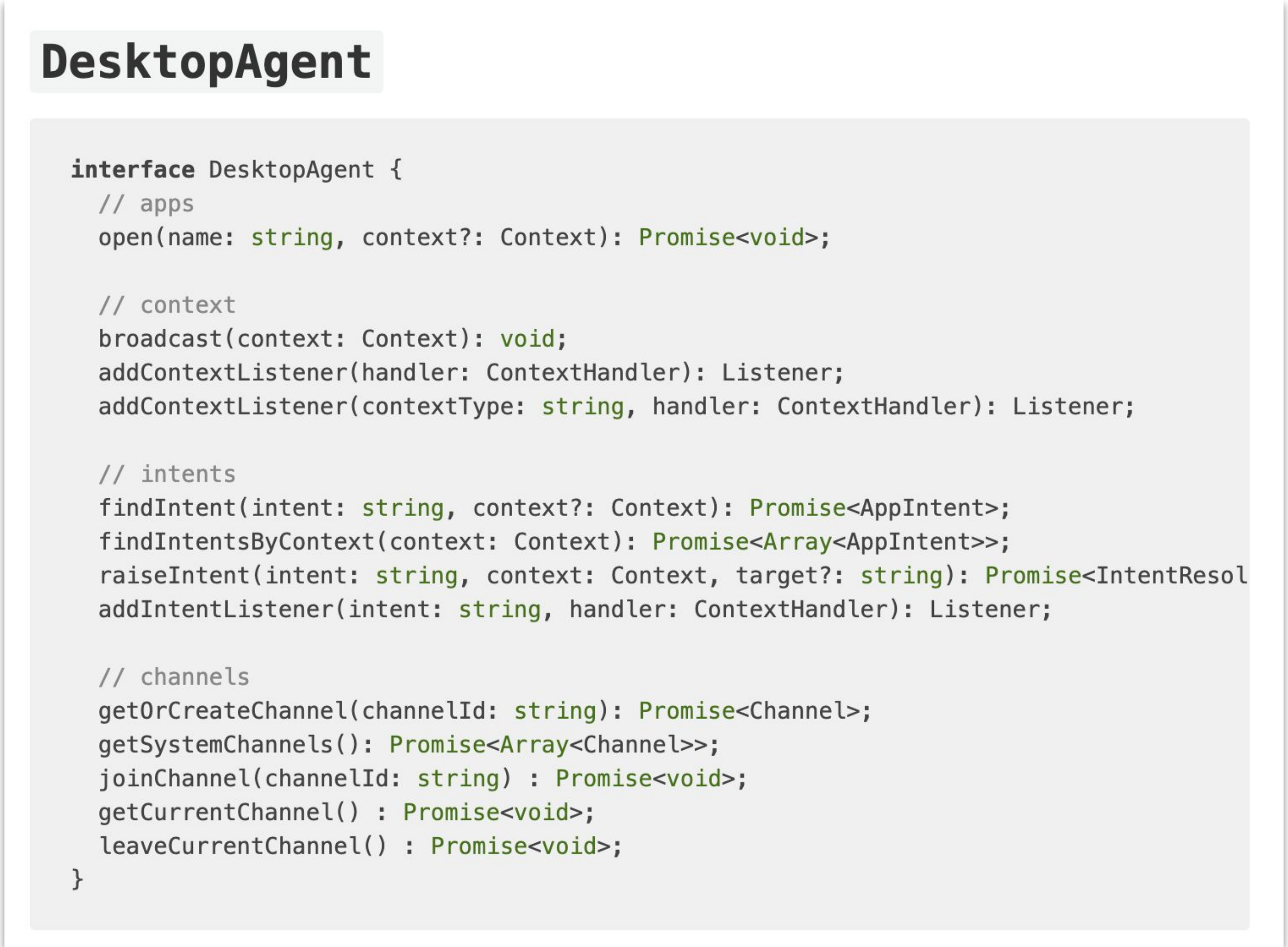
1.0 PRODUCTION

NOV 2019

FDC3 1.1

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

- channels api
- expanded context data
- developer experience



DesktopAgent

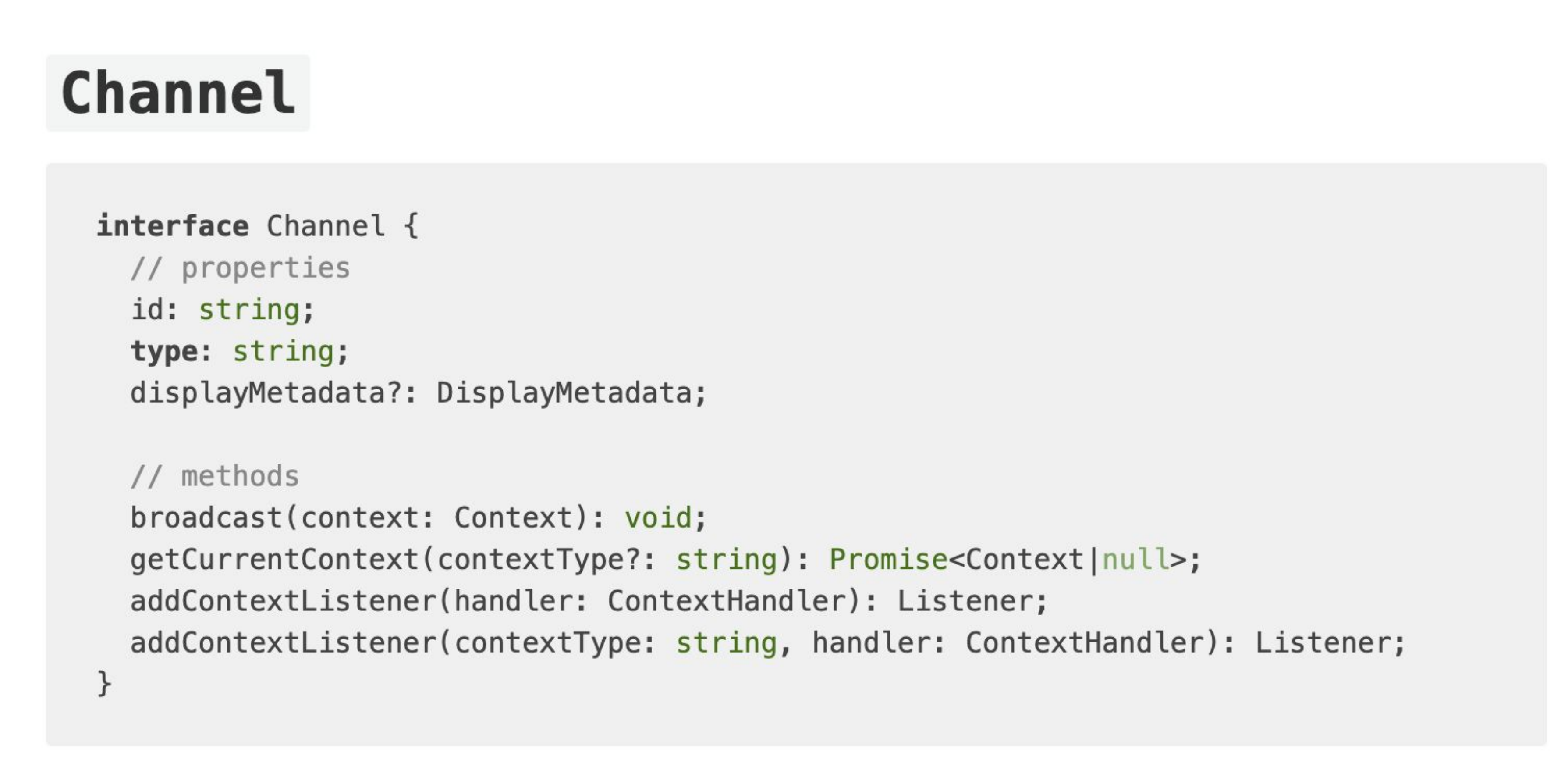
```
interface DesktopAgent {
  // apps
  open(name: string, context?: Context): Promise<void>;

  // context
  broadcast(context: Context): void;
  addContextListener(handler: ContextHandler): Listener;
  addContextListener(contextType: string, handler: ContextHandler): Listener;

  // intents
  findIntent(intent: string, context?: Context): Promise<AppIntent>;
  findIntentsByContext(context: Context): Promise<Array<AppIntent>>;
  raiseIntent(intent: string, context: Context, target?: string): Promise<IntentResol
  addIntentListener(intent: string, handler: ContextHandler): Listener;

  // channels
  getOrCreateChannel(channelId: string): Promise<Channel>;
  getSystemChannels(): Promise<Array<Channel>>;
  joinChannel(channelId: string) : Promise<void>;
  getCurrentChannel() : Promise<void>;
  leaveCurrentChannel() : Promise<void>;
}
```

https://fdc3.finos.org/docs/next/api/ref/Channel



Channel

```
interface Channel {
  // properties
  id: string;
  type: string;
  displayMetadata?: DisplayMetadata;

  // methods
  broadcast(context: Context): void;
  getCurrentContext(contextType?: string): Promise<Context|null>;
  addContextListener(handler: ContextHandler): Listener;
  addContextListener(contextType: string, handler: ContextHandler): Listener;
}
```

https://fdc3.finos.org/docs/next/api/ref/Channel

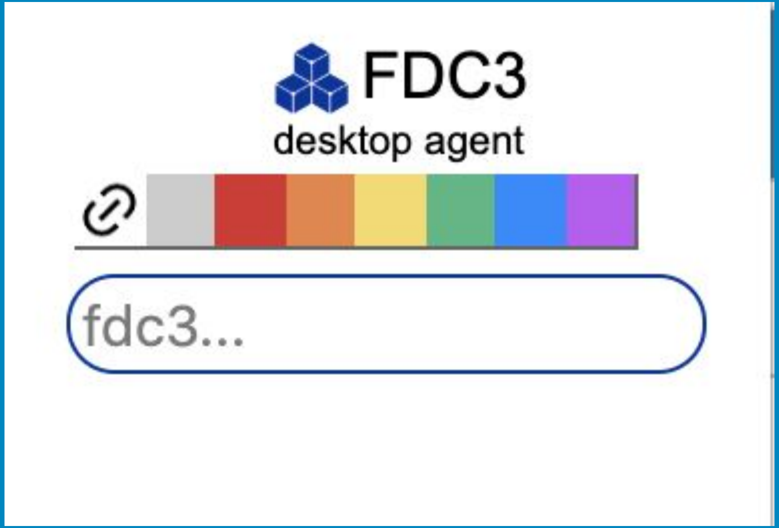
- **fdc3.contact**
  - A person contact that can be engaged with through email, calling, messaging, CMS, etc.
  - Financial Objects Specification
  - schema
- **fd3.contactList**
  - A collection of contacts.
  - Financial Objects Specification
  - schema
- **fdc3.country**
  - A standard country entity.
  - Financial Objects Specification
  - schema
- **fdc3.instrument**
  - A financial instrument from any asset class.
  - Financial Objects Specification
  - schema
- **fdc3.instrumentList**
  - A collection of instruments.
  - Financial Objects Specification
  - schema
- **fdd3.organization**
  - A standard organization entity.
  - Financial Objects Specification
  - schema
- **fdc3.portfolio**
  - A collection of positions.
  - Financial Objects Specification
  - schema
- **fdc3.position**
  - Financial Objects Specification
  - schema

Context and Intents reference sections

Context type filtering on APIs

Tooling projects

Demo



FDC3

desktop agent

fdc3...

https://github.com/nkolba/desktop-agent

Lessons learned

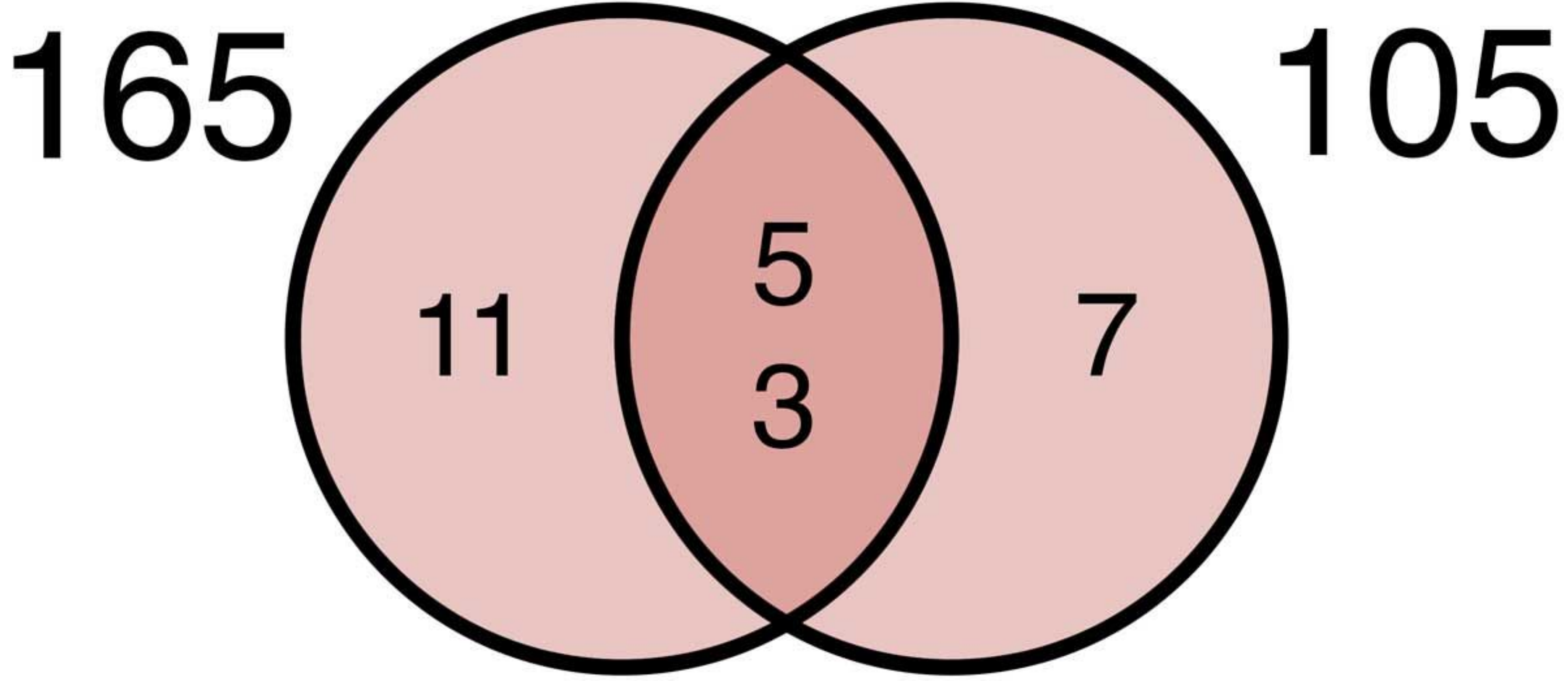
open source in finance

#1 Find a problem

#2 Convince people to care

#3 Ensure neutrality

#4 Find the least common denominator



#5 Iterate

- open source from inception
- collaborative by definition
- designed for adoption

end