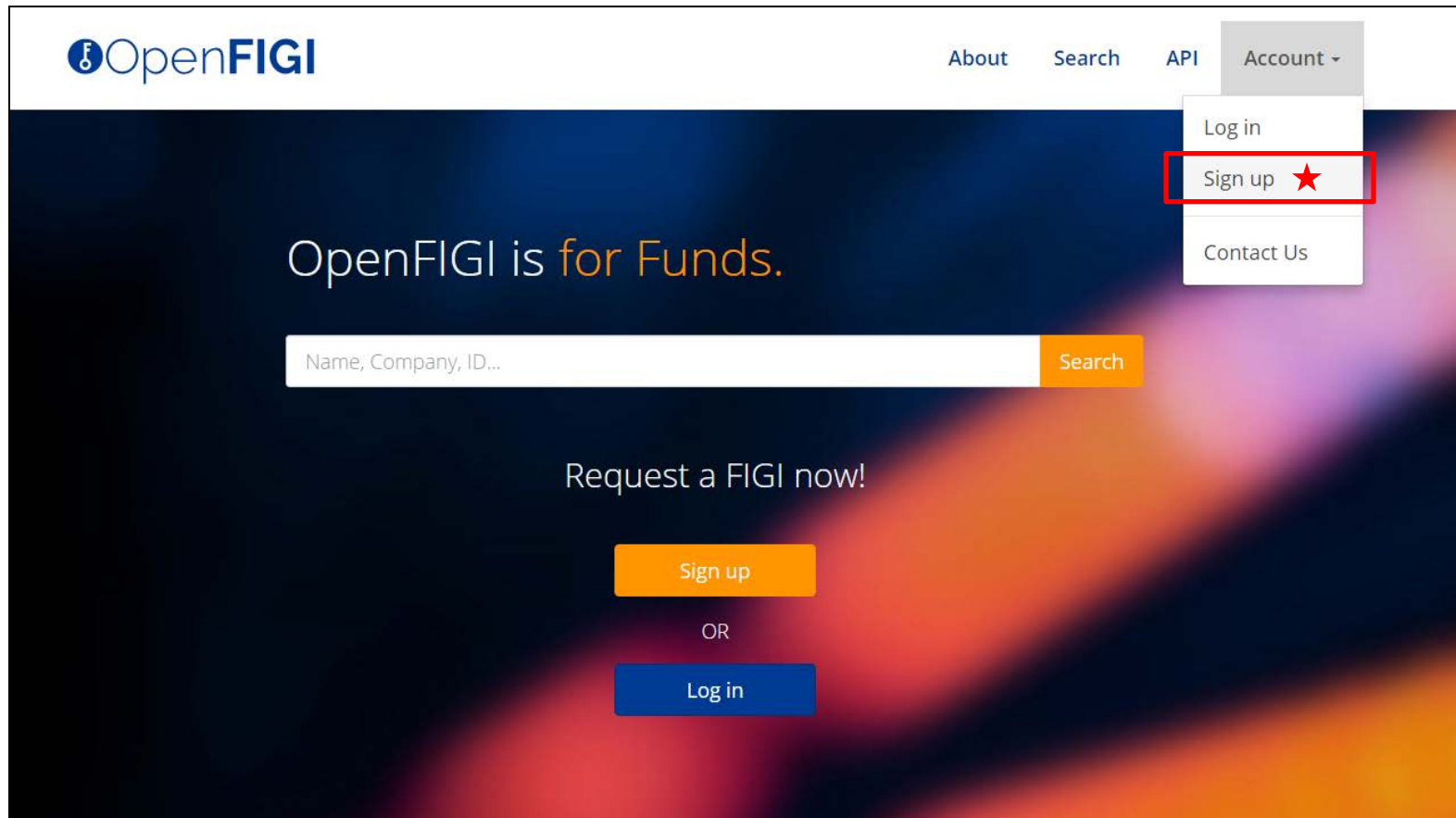




Navigating OpenFIGI.com

<https://www.openfigi.com>

Step 1: Select “Sign up”



The screenshot shows the OpenFIGI website interface. At the top left is the logo "OpenFIGI". To the right are navigation links: "About", "Search", "API", and "Account". The "Account" link is highlighted in grey and has a dropdown menu open. The dropdown menu contains three items: "Log in", "Sign up" (which is highlighted with a red box and a red star icon), and "Contact Us". Below the navigation is a search bar with the placeholder text "Name, Company, ID..." and an orange "Search" button. The main content area features the text "OpenFIGI is for Funds." followed by a call to action "Request a FIGI now!". Below this are two buttons: an orange "Sign up" button and a blue "Log in" button, with the word "OR" centered between them.

Step 2: Complete Sign up Form

The screenshot shows the OpenFIGI website's sign-up page for an institutional account. The page has a dark header with the OpenFIGI logo and navigation links for 'About', 'Search', 'API', and 'Account'. Below the header is a 'Sign up' banner. The main content area is titled 'Sign up for an institutional account.' and features a placeholder for a profile picture. A link asks 'What is an institutional account?' and another link says 'Already a user? Log in here.' The form is divided into several sections: 'Account Info' (with a 'Collapse' button), 'Credentials' (with fields for 'User name', 'Password', and 'Repeat password'), 'Email' (with 'Your business Email'), 'Sharing this account with colleagues?' (with a 'Security Question' dropdown and 'Your answer - please remember this.'), 'About You' (with fields for 'First Name', 'M.', 'Last Name', 'Suffix', 'Company name', 'Select' dropdown, 'Phone', 'Job Title', and 'Industry'), and 'Company Address' (with fields for 'Address Line 1', 'Address Line 2 (Optional)', 'Select Country' dropdown, 'City', 'State/Province', and 'Zip/Postal Code').

Sharing an account with Colleagues?

Set up an Institutional Account:

- Allows multiple users (max 20).
- Requires a main login to be created **first** before additional users can be added using the steps below:
 - Log in to your account.
 - Click on the 'Account' dropdown.
 - Choose 'Manage Profile'.
 - Click on 'Manage Emails'.
 - Add up to twenty individual emails to one account*.
 - Use the 'remove' option to delete an email from the account.
- In a shared account, all users will have access to Submissions/History and ability to edit profiles.

All users will share the **same username and password.**

Check Account Type

Account Type Collapse ▲

API Key Only

Access to Request FIGI (Requires an Internal Review)

Terms and Policy Collapse ▲

I have read and agree to the [Terms of Service](#).

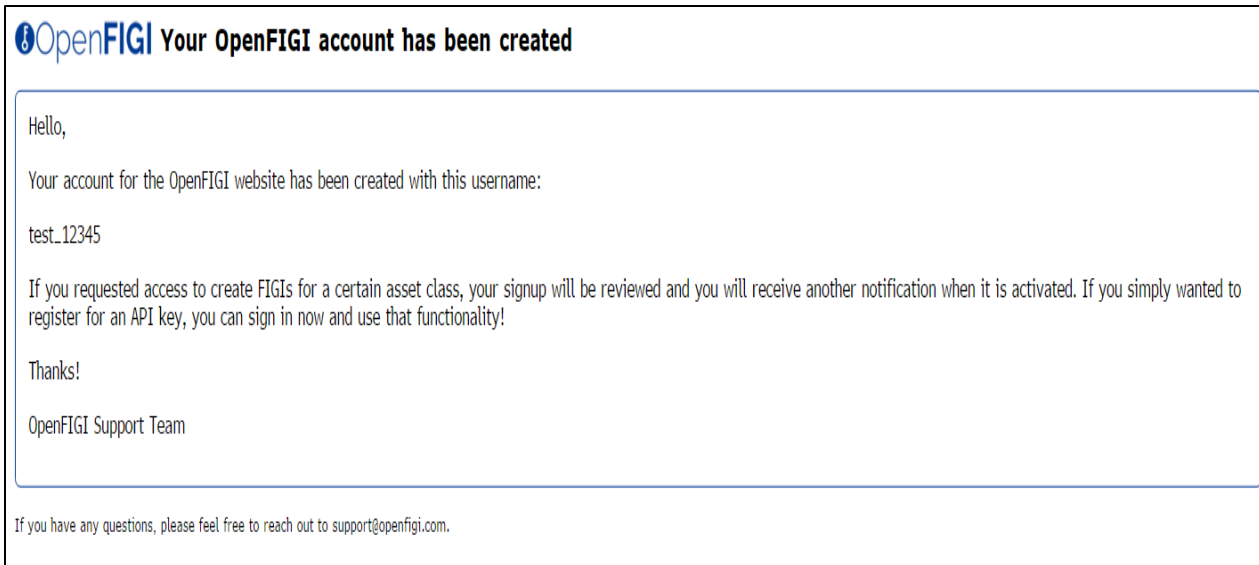
I have read and agree to the [Privacy Policy](#)

Ensure this box is ticked to request FIGIs for a specific asset type.

For FIGI Requests:

- Make sure to choose your Account Type, particularly if you are looking to request FIGI identifiers. For example, if you wanted to request Mutual Funds, choose "Access to Request FIGI" and choose "Funds" in the dropdown.
- Click 'Sign up' to submit all details.
- A confirmation email will be sent shortly to the email address registered.

Confirmation Email



- The confirmation email sent indicates that the account has been **CREATED**.
- Please kindly allow at least 24 hours for additional **APPROVAL** to be granted if seeking access to request FIGIs.
- You will receive a **second** confirmation email with final approval decision.

Login: Before Approval

Welcome to OpenFIGI

Your account is being reviewed!

A notification will be sent to you when your account is activated, and you will be able to start requesting new FIGIs.

If you are also interested in using our API for mapping other identifiers to FIGI, you can obtain information and activate your API key by visiting the [API page](#).


If you have any questions, please [Contact Us](#).

Also, please feel free to browse [About](#) information.

While the account is still under review, users will be directed to a landing page explaining the approval process.

Note: A new confirmation code is generated at every login.

Account Activation

 **Your OpenFIGI account has been activated**

Hello,

Your account for the OpenFIGI website:

test_12345

has been activated. You can now create FIGIs and view submissions of previous FIGIs.

Please visit the link below to activate your account:

https://www.openfigi.com/user/activation/test_12345


Thanks!

OpenFIGI Support Team

If you have any questions, please feel free to reach out to support@openfigi.com.


- You will receive a separate email once your account has been ***approved to submit requests*** (i.e. Funds).
- Use your account information together with the emailed confirmation code to access your approved account.

Step 3: Request a FIGI

 [About](#) [Search](#) [API](#) [Account ▾](#)

Log in
Provide your institutional account, password, and your authorized email to log in.

Log in to your institutional account



[Log in](#)

[New institution? Sign up here.](#)

[Forgot password? Reset it here.](#)

[Want to share this account with colleagues?](#)

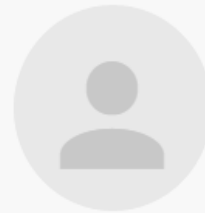
Enter Confirmation Code

Check Confirmation Code

Please check your email for confirmation code we just sent.

Please validate your e-mailed confirmation code.

Validate Against Login Confirmation Code



2 factor key cannot be empty.

Validate

Did not receive the code? Try to log in again.

Successful Login:

Under 'Request' tab > New Submission

OpenFIGI About **Request** Search API Account

New Submission

Please use the dropdowns below to navigate to the instrument type that you want to fill out. A "Start" button will appear below any choice that has an associated form. If you know the name of the instrument type form you want to submit, you can use the quick search below to find it.

Select from List

Asset Class	Type
3 choices available	1 choice available
Derivatives >	All Funds
Fixed Income >	
Funds >	Start

Quick Search

Single / Bulk Submission

OpenFIGI About Request Search API Account

New FIGI Request

There are two ways to request FIGI identifiers: Single Submission and Bulk Submission. Please choose the proper tab below for your need.

To request a single new FIGI Identifier, fill out the form below and click "Publish" at the bottom. On successful completion you will receive a tracking number. You can check the status of your submission on the "Submissions" tab. To do a bulk submission, please choose the "Bulk Submission" above.

Single Submission Bulk Submission

All Funds

Fill out the form below to request a new FIGI for a Fund Share Class. If you have any questions, reach out to the website admins, or if you already have a Bloomberg Data representative, you can reach out directly to them.

Please note:

- 1) If the inception date of the fund has already passed, please submit an Excel file with full NAV history back to inception, in addition to the prospectus. This is necessary to process your request.
- 2) If you have a preferred ticker, please enter it in the Requested Ticker field. This should be a 7-digit alpha-numeric combination. It is, however, not guaranteed if the requested ticker is already in use.

General Information Collapse

Document Contact

* First Name

* Last Name

* Phone Number

* Email

Pricing And Assets Contact

* First Name

* Last Name

* Phone Number

* Email

Dividends Contact ✕ Empty children fields

(*) First Name

(*) Last Name

(*) Phone Number

(*) Email

Portfolio Holdings Contact

* First Name

* Last Name

* Phone Number

* Email

Pricing Info

Bloomberg Pricing Contact ✕

- Select 'Single' or *Bulk* submission (*Bulk submission is required in a JSON format*)
- Complete all mandatory fields labeled with an asterisk (*) and attach supporting documents in the 'Attachments' box at the bottom of the page.
- Click 'Publish' at the end to complete your submission. This example shows completing a submission for Funds.


Submission

Submission Files

Select or drop attachment documents here

Up to 10 files, accepting .pdf, .xlsx, .xls, .csv, .doc, .docx, total limit 12.0MB.

No file added yet

I'm not a robot 
reCAPTCHA
[Privacy - Terms](#)

Publish **Publish bundle with multiple Share Class children**

- Prospectus, term sheets, pricing files, and other financial documents can be submitted in the box above.
- Select either to 'Publish' or you may pend the submission by 'Publish bundle with multiple Share Class children' until all share classes are filled out in the example of Mutual Funds.

Under 'Request Tab' > Submission History

OpenFIGI About Request - Search API Account -

Submission History

This page shows a recap of your submission history. Next to each submission are buttons that allow you to either view the full details for a submission or copy the contents of a submission directly to a form to create a new submission similar to this one.

All Submissions Staged Submissions Migrated Submissions

Submission Time	Email	Security Type	Submission ID	Status	Assigned Identifier	Actions
2016-01-15 11:53		All Funds	6240058413585006592	Rejected		View Copy
2016-01-15 11:05		All Funds	6240046112798670848	Rejected		View Copy
2016-01-15 09:03		All Funds	6240014501839634432	Rejected		View Copy
2015-12-22 09:02		All Funds	6231108225724841984	Accepted		View Copy
2015-12-22 09:01		All Funds	6231108126941904896	Accepted		View Copy
2015-12-22 09:01		All Funds	6231107980911706112	Accepted		View Copy

- **All submissions** – check the progress of your submissions here.
- **Staged Submissions** – more than one share class has been submitted. For example, Funds may have multiple share classes (please remember to complete and publish your funds submission in this section otherwise it will remain in pending status.)
- **Migrated Submissions** – historic submissions transferred from the legacy Funds Core Data Portal.

FAQ

Registration Question:

- ***How long will it take for me to get my login details once I register?***

We aim to privilege all users within 24 hours. You will receive an email confirmation once the account has been created.

- ***Are personal email account domains not allowed to register for a login?***

We have restricted the popular non-institutional email domains from creating an account.

Submission Status Questions:

- ***How can I check on the status of my submission request?***

Once your submission has been completed, you should receive a confirmation with Submission ID indicated. Please send all submission inquiries to support@openfigi.com and include the submission ID and username.

- ***Will I be notified if a submission is accepted or rejected?***

You will receive an email confirmation with the specific instruments information if successful. Should the submission be rejected, you will also receive a confirmation notifying the reason for rejection.

- ***Do I have to re-enter the contact section every time I login? Where will this information be displayed?***

You will need to complete all required fields with an asterisk (*). You may copy the information across if the details are the same. This information is for internal purposes only and will not be displayed anywhere.

- ***Will my information be saved if I have to step away for an extended period of time?***

The website will timeout after one hour, where you will lose any information in a form that hasn't been submitted.

FAQ

Fund Related Questions:

- ***Can I request for a specific ticker?***
Yes, the ticker has to be 7-digits long assuming the ticker is not already taken.
- ***The fund is targeted at both retail and institutional investors. How do I select both?***
If the share class targets both, choose retail.
- ***What documents do I need to attach?***
Please attach the fund's Prospectus and historical pricing file (preferably in .xls) as a bare minimum for us to set up the ticker. If the fund is pending listing, the pricing file may be provided once the fund has been launched
- ***Does the prospectus need to be the most recent?***
Yes, the prospectus should not be older than 12 months; otherwise your request might be rejected. If the Prospectus is older than 12 months, please attach a supplement document substantiating it.
- ***Does the Prospectus need to be in English?***
No. However, please include a brief summary of the funds' investment objective and strategy.
- ***Do I need to have a third party identifier to request a ticker?***
Yes, you will need to provide one identifier when submitting your fund. Most funds will have some type of identifier depending on their domicile.
- ***Can I use OpenFIGI to make changes to existing funds (i.e update static data/NAV)?***
Not at this time. OpenFIGI.com is a platform for you to submit new funds/shares classes. For existing funds support, please reach out to your respective representative via gfun@bloomberg.net
- ***How long does it take for a ticker to be created?***
Please kindly allow 3-5 working days for a ticker to be assigned. Users will receive an email once the ticker has been created.
- ***I have received the a ticker but I cannot see the fund on the OpenFIGI website search yet. Why is there a delay?***
The OpenFIGI website currently refreshes once daily and successful submissions will be available the following day.

- END -