Step 1: Select “Sign up”
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.*
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.
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.
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.
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

Log in

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

Log in to your institutional account

Username
Password
Your Email

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

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

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

<table>
<thead>
<tr>
<th>Asset Class</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>3 choices available</td>
<td>1 choice available</td>
</tr>
<tr>
<td>Derivatives</td>
<td>All Funds</td>
</tr>
<tr>
<td>Fixed Income</td>
<td></td>
</tr>
<tr>
<td>Funds</td>
<td></td>
</tr>
</tbody>
</table>

Quick Search

Search by name
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.
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

- **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.
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.
**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 gfunds@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 currentlyrefreshes once daily and successful submissions will be available the following day.