

Q1 FINOS All Community Call

Wednesday March 12, 2025



Today's Agenda

- FINOS Updates (15 minutes)
 - Welcome & CTAs - [Karl Moll, FINOS](#)
 - New Year Kick-off & Upcoming Dev Events - [Olivier Poupeney, FINOS](#)
 - DTCC AI Hackathon Recap
 - OSFF 2025 updates + CFP - [Grizz Griswold, FINOS](#)
- Projects, SIGs and Community Updates: (25-30 minutes)
 - TraderX Updates - [Dov Katz, Morgan Stanley](#)
 - FINOS AI:
 - Recent London Workshop - Governance Framework v0>v1 - [Andrew Martin, ControlPlane](#)
 - AI GF Machine Readability: CCC/CFI/CALM - [Leigh Finegold, Morgan Stanley](#)
 - CDM & LLM/AI Exploration - [Ian Sloyan, FINOS](#)
 - Common Domain Model (CDM) - [Ian Sloyan, FINOS](#)
 - FDC3 Release - [Rob Moffat, FINOS](#)
 - FSI Autism Hackathon - [Peter Smulovics, Morgan Stanley](#)
 - DevOps Automation SIG:
 - New Working Groups [Miguel Gasca](#) & [Khalid Elsayaf, Morgan Stanley](#)
- Final Announcements + Save the Dates - [Kendall Perez, FINOS](#)
- Recap of CTAs, Q&A (time permitting) - [Karl Moll, FINOS](#)

Please Note:

[This event, and all FINOS events adhere to the FINOS / Linux Foundation Code of Conduct](#)

Welcome & CTAs



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Karl Moll, FINOS



Calls To Action



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New Year Kick-off & Upcoming Dev Events



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Olivier Poupeney, FINOS



Platinum



Major Milestone
100+
MEMBERS

Gold



Silver



Associate




INNOVATE.DTCC: AI-Powered Hackathon

DTCC +  **Broadridge** + **FINOS**

Feb 3rd-7th,
2025

DTCC contributed \$250k+ in grants to fund the ongoing open-source development of winning solutions through FINOS, ensuring these projects continue beyond the hackathon & make a lasting impact. Check out [https://github.com/finos-labs!](https://github.com/finos-labs)

 **Gold: CIBC** - Reg Central: Automated Regulatory Change Management Solution

 **Silver: The Depository Trust & Clearing Corporation (DTCC), Standard Chartered, Codincity and DevRel Talent** - Cyber Third Eye: Third-Party Cybersecurity Risk Scoring Platform

 **Bronze: Deutsche Bank** - Xypher: AI-Powered Trade Settlement System

 **Academic Institution Award: Cipher Sentinel Duke University:** AI-Powered Anti Money Laundering for Digital Wallets

FINOS Fintech Open Source Foundation



35

Projects



50

Organizations

250

Hackers

OSFF London Updates & CFP



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Grizz Griswold, FINOS



**Save the dates for
OSFF 2025!**

LONDON: 24 JUNE

QUEEN ELIZABETH II CENTRE

(Schedule Launches 9 April)

(Registration Open)

NEW YORK: 21-22 OCTOBER

CONVENE 225 LIBERTY ST

(CFP Launches 2 June)

(Registration Now Open)



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Speak at #OSFF25 in London

Suggested Topics

- Artificial Intelligence (AI), Emerging Technologies and Innovation
- Case Studies in Open Source Financial Applications
- CDM (Common Domain Model), Regulatory Technology (RegTech), and Compliance
- Developer Tools, Best Practices, and Talent Development
- FDC3, Frontend Development, and Interoperability
- Hot Topics in Open Source Finance
- OS-Climate
- Open Source Collaboration and Community Building
- Open Source Readiness
- Open Source Security and Supply Chain Risk Management



CFP Closes:
Sunday, 16 March

LONDON - 24 JUNE 2025



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OSFF Key Dates: Mark your Calendars

29 January	London CFP Opens
4 February	London Registration Opens
10 March	NYC Registration Opens
16 March	London CFP Closes
9 April	London Schedule Announced
23 May	London Sponsorship Ends
2 June	NYC CFP Live
10 June	London Member Free Registration Ends
23 June	London Roundtable / Workshop Day
24 June	London OSFF (Full Day)
27 July	NYC CFP Closes
20 August	NYC Schedule Announced
26 September	NYC Sponsorship Ends
7 October	NYC Member Free Registration Ends
21 October	NYC Day 1 (Half Day)
22 October	NYC Day 2 (Full Day)

LONDON
NYC



SIG & Community Updates



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TraderX

Dov Katz, Morgan Stanley



FINOS

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TraderX - Overview



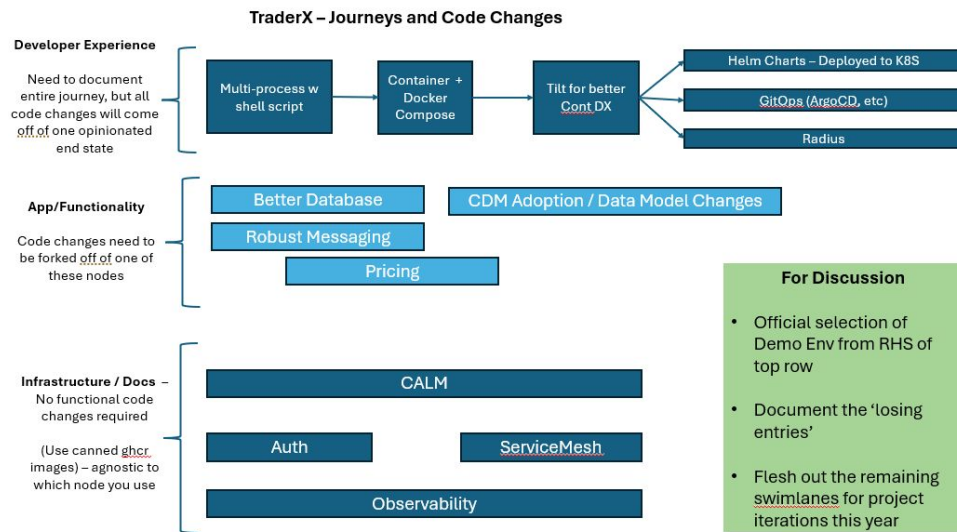
- Open source, cloud-native, and highly modular reference architecture for **trading platforms**:
 - **Modular**
 - **Lightweight Deployment**
 - **Integration Hub**
- **Several different open source teams** have integrated different projects/solutions into TraderX this year:
 - Juxt bi-temporal database
 - Azure Radius
 - CALM
 - Morphir
 - CDM Integration for Trade Processor
 - AI4Finance/Smoothstack LLM for trading service
 - Backstage instance mapping TraderX services
 - Many more!

GitHub



TraderX - Future

- Managing all these different features in a monorepo will create burdensome dependencies for developers wanting to learn a single feature
- Going forward:
 - Identify **collections of features** that go together in a trading system
 - Reorganize the GitHub** so that devs can check out "clean" versions of TraderX focusing on a single feature pathway (e.g. authentication, architecture)
 - Create a curriculum** of these feature collections (similar to an O'Reilly book - each chapter is a feature collection that builds on each other, each chapter starts from a clean build)
- CTA:
 - Join TraderX call!**
 - Looking for:
 - GitHub organization experts** with opinions on restructuring repo
 - Tech leads** with opinions on feature collections
 - Tech writers** to help us build the curriculum & documentation
 - Developers**, to continue building integrations!



Friday 28th March 2025 12PM
GMT, 8AM EST

GitHub



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FINOS AI Readiness SIG Governance Framework

Andrew Martin, ControlPlane

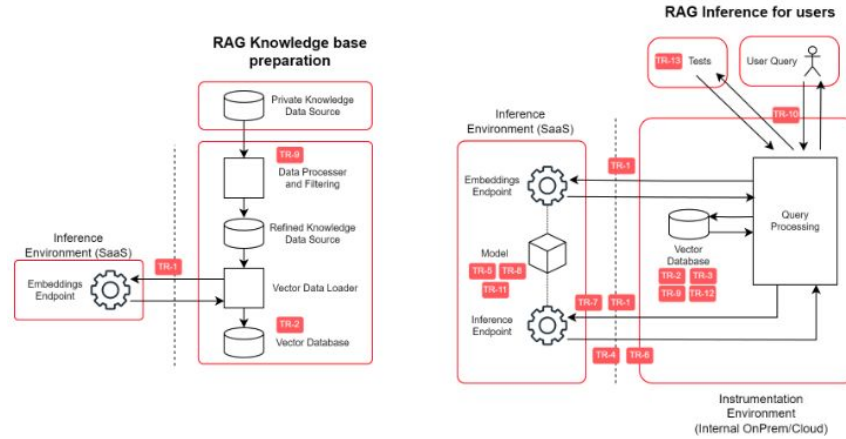
Leigh Finegold, Morgan Stanley



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AI Readiness Governance for Financial services Framework First Release



Launched on Q1'24

Q1'24

Initial Commits

June 17, 2024

11 threads and 8 controls

July 3, 2024

NYC AI Readiness Workshop

Sept 12, 2024

Governance Framework V0 Released

**Oct 1, 2024
SIG fully open to community**



Check out the Framework.



Join the SIG, now fully open.



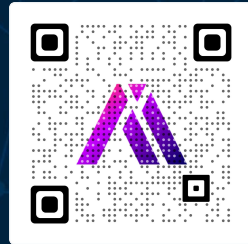
Read the Announcement

Get involved, contribute, fund

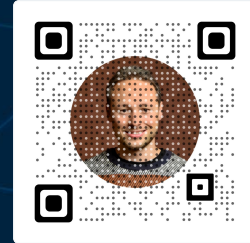
Join the AI
Readiness SIG



Participate in
FINOS AI
Exploration



Be part of the
AI 2025 fund



AI Readiness - Governance Framework London Workshop Recap



AI READINESS

- Chatham House Rule.
- **When:** February 18, 2025.
- **Where:** Citi Office, Canary Wharf, London
- **What:** SIG members (and several other projects) came together in-person/virtual to review the AI Governance Framework Feedback and focus on the AI Governance Framework Roadmap.
- **Key Stats:**
 - 46 Registrations
 - 12 people on site (10+ Virtual)
 - **3 Tracks - more on this next slide**
 - 3 PRs
- **CTA:**
 - **Feedback!**
 - **Join AI Readiness SIG - Governance Framework Bi-Weekly Working Sessions**
 - Looking for
 - **AI Governance & Responsibility**
 - **Risk & Compliance**
 - **Security/IT**
 - **Test/QA**
 - **Controls/Infra/Architecture**
 - **Tech writers**

Governance Framework



Feedback Survey



Wednesday 26th March 2025
2PM GMT, 10AM EST

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AI Readiness - Governance Framework Machine Readability

- **Triangle of overlap between:**
 - Common Cloud Controls (CCC)
 - Compliant Financial Infrastructure (CFI)
 - Common Architecture Language Model (CALM)
- X-as-Code Model Deployment & Governance
- **Recent Work:**
 - Mapping between **features, threats, and controls** using Common Cloud Controls (CCC) schema.
 - Discussed feasibility of using CALM to implement **Architecture-as-Code** implementation of **GF Reference Architecture**.
 - CALM also proposed for modeling CCC controls.
- **Key Stats:**
 - Several ongoing calls & GH issues discussing
- **CTA:**
 - **Join AI Readiness SIG - Governance Framework Bi-Weekly Working Sessions**
 - **Join CALM Office Hours on Thursdays**
 - Looking for
 - **AI Governance**
 - **Risk & Compliance**
 - **Controls/Infra/Architecture**
 - **DevOps/IT**



AI READINESS

CCC GH
Issue



CALM GH
Issue



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FINOS AI Exploration *LLMs, CDM Documentation & Code*

Ian Sloyan, FINOS



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LLMs, CDM Documentation & Code

- **AI Exploration (formerly LLM Exploration)** has been working on CDM LLM training since pre-OSFF NYC
- Recently Demoed a **functional chatbot** with advanced CDM knowledge and problem solving.
- **CTA:**
 - In order to improve the performance of LLMs focused on specific use cases, we need a first batch of >50 CDM *Questions & Answers* dataset for **benchmarking**
 - Need to develop a **Curriculum**, volunteers needed - please come to the call!
- **Also Discussing**
 - **DTCC AI Powered Hackathon Winners**

Thursday 26th March 2025
4PM GMT, 12PM EST

CDM/LLM
Blog



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Common Domain Model (CDM)

Ian Sloyan, FINOS



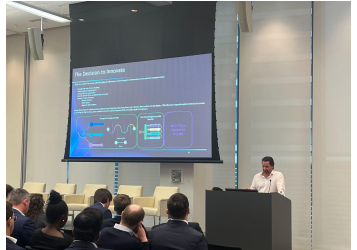
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Project Highlight: Common Domain Model

CDM Showcase - February 2025

- 300 registrants, insightful talks, and hands-on demos.
- Showcased CDM's practical applications and growing momentum.
- **J.P. Morgan** highlighted a clear return on their CDM investment, achieving **streamlined workflows** and **faster issue resolution**



CDM 6.0 Released!

- Enhanced interoperability, expanded asset coverage (including digital assets).
- Optimized for efficiency, improved regulatory alignment.



CDM 6.0: Read the blog post!



Unlock CDM Basics - Free 90 min Course



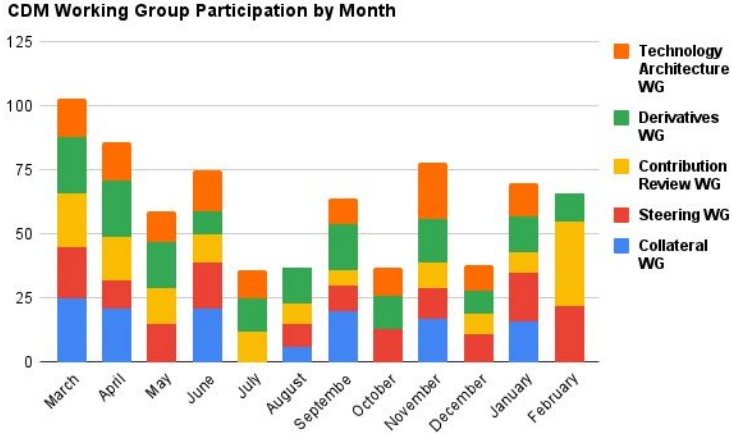
Get Involved!

Project Highlight: Common Domain Model

Get Involved!

- Read [Lionel Smith-Gordon's blog post on CDM 6.0](#)
- Take the [free training](#)
- Join the **new** monthly [CDM Tokenization WG](#) & look out for the **new CDM Physical Risk WG**
- Participate in ongoing WG developments

Robust community participation in the working groups!



CDM 6.0: Read the blog post!



Unlock CDM Basics - Free 90 min Course



Get Involved!

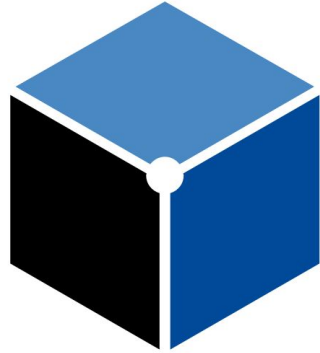
FDC3 Announcement

Rob Moffat, FINOS



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FDC³

Tuesday 18th March 2025 2PM GMT, 10AM EST

FDC3: 2.2 Release!

- Find out how to start using it.
- Several **Demos!**
- Welcome our **New Maintainers**
- Language Support: Go + .NET
- FDC3 Security
- **What's Next** in FDC3



SCAN ME

Financial Services Autism Hackathon

Peter Smulovics



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8th FSI Autism Hackathon – April 2-3 – Join Now!

WHO

1 in 36

Children identified with autism spectrum disorder (ASD)

5,437,991

Adults in United States have ASD

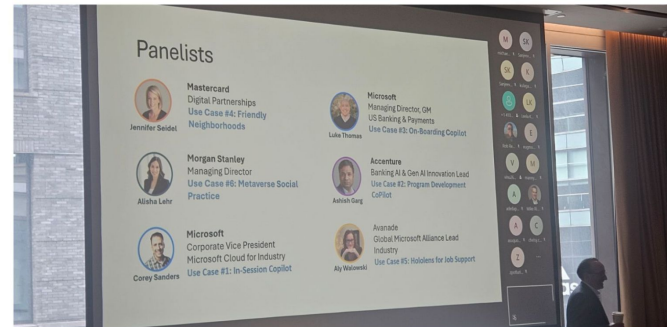
WHY

85%

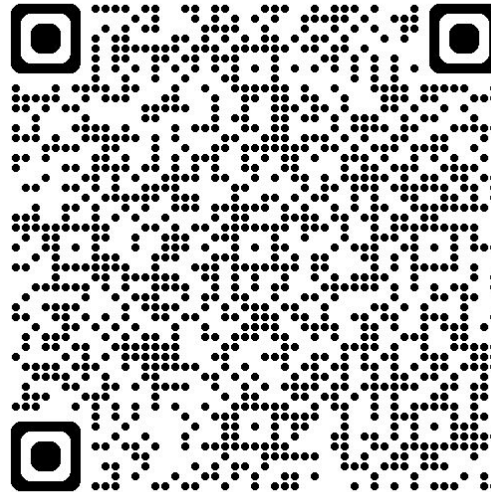
US Unemployment Rate among people with ASD while having a College Education.

160%

Increase in diagnoses of kids (4-year-olds) in 2016 vs 2012.



- **Morgan Stanley**
- UBS
- Willis Towers Watson
- JPMorgan Chase
- Mastercard
- Wellington Management
- FINOS
- Deutsche Bank
- State Street Bank



DevOps Automation SIG

PLACEHOLDER, Morgan Stanley



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New DevOps Automation SIG Working Group! Evolution at Scale

- **Vision:** Intelligent automation manages software complexity, allowing developers to focus on new features.
- **Mission:** Forum for discussion and collaboration on evolution at scale.
- **Benefits:** Proactive, efficient system evolution; secure, up-to-date software.
- **Focus:** Simplifying automated mass changes to many code repositories.
- **Collaboration:** Open source maintainers, security researchers, vendors, and financial institutions work together.
- **Objectives:**
 - Compare tools for evolving code at scale.
 - Share use cases and success stories.
 - Provide recipes, scripts, and tooling.
 - Advocacy: Raise awareness of evolution at scale benefits.
- **CTA:**
 - Join the Call! Right after this! (& bi-weekly)



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Save the dates!



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Kendall Perez, Member Success, FINOS



Save the dates

March 19, 2025

OSinFinance Webinar with
FINOS member, Hedera

[Register here](#)

March 19, 2025

Silver Board Representative
Nominations Deadline

1 Silver seat on the FINOS Governing Board up for
election

May 2025

Gold Member Board
Representative Election

1 Gold seat on the FINOS Governing Board up for
election

June 24, 2025

OSFF London

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discounts! Stay tuned for updates on early bird
registration + sign up for speaker opportunities

October 21-22, 2025

OSFF New York City

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