

Create Finmars CE VM

Sure! Let's make your EC2 and name it **finmars-platform-vm**. Follow these steps:

1. Sign in to AWS

- Open your browser and go to console.aws.amazon.com.
- Enter your AWS email and password.

2. Open EC2

- At the top, click the search box and type **EC2**.
- Click **EC2** under "Services."

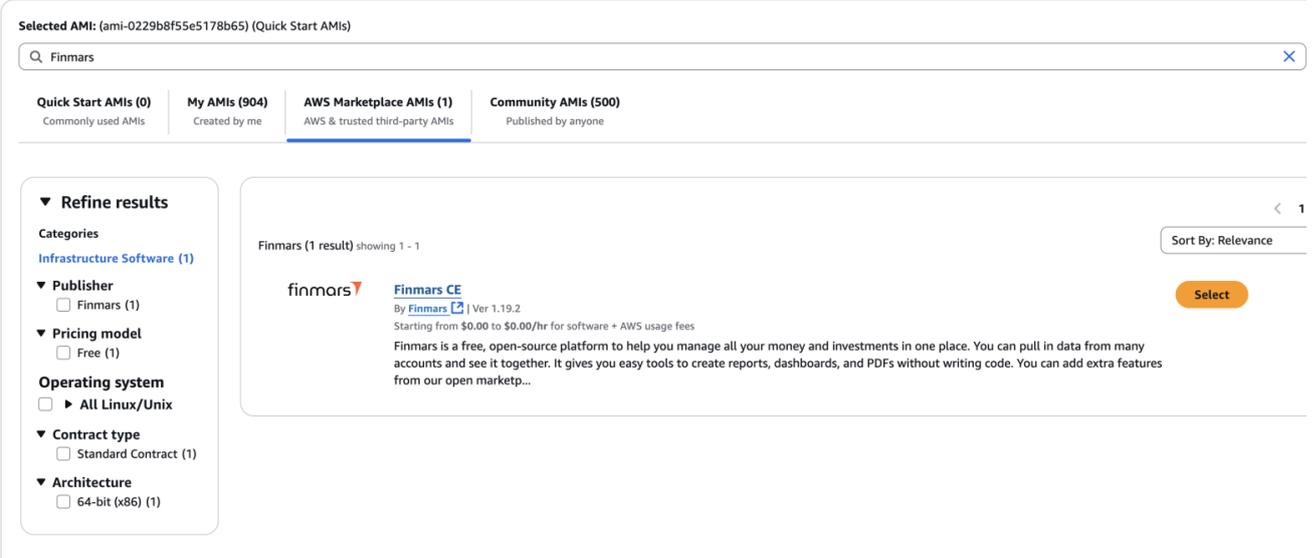
3. Launch a new instance

- Click the blue **Launch instances** button.

4. Name your instance

- In the **Name tag** box, type **finmars-platform-vm**.

5. Choose AMI (Finmars CE x.x.x) - latest version



The screenshot shows the AWS Marketplace console with a search for 'Finmars'. The search results are filtered to 'AWS Marketplace AMIs (1)'. The results list 'Finmars CE' by Finmars, version 1.19.2, with a description: 'Starting from \$0.00 to \$0.00/hr for software + AWS usage fees. Finmars is a free, open-source platform to help you manage all your money and investments in one place. You can pull in data from many accounts and see it together. It gives you easy tools to create reports, dashboards, and PDFs without writing code. You can add extra features from our open marketp...'. A 'Select' button is visible next to the result.

- Scroll or search for **Finmars CE (e.g. Finmars CE 19.1.0)** in AWS & Trusted third-party AMIs tab.
- Click **Select**.

6. Select instance type (2 vCPU, 8 GiB RAM)

- Find and click **t3.large** (it has 2 vCPU and 8 GiB).

7. Create or select key pair

- Choose **Create a new key pair**.
- Name it (e.g. **finmars-platform-vm-key**).
- Click **Create Key Pair** and save the `.pem` file safely. - **Do not Lose this file, if you lose it, you will not able to connect to your VM again**

8. Configure instance details

- Click **Edit**
- Under **Subnet - No Preference** or pick one (any is fine).

- Turn **Auto-assign Public IP** to **Enable**. (If already enabled - OK)
- Configure Inbound Security Group Rules
- Add Security Group Rule 1
 - Type: **SSH**
 - Source Type: **Anywhere**
 - Port range: **22**
- Add Security Group Rule 2
 - Type: **HTTP**
 - Source Type: **Anywhere**
 - Port Range: **80**
- Add Security Group Rule 3
 - Type: **HTTPS**
 - Source Type: **Anywhere**
 - Port Range: **443**
- Add Security Group Rule 4 - **this is important for further Installation**
 - Type: **Custom TCP**
 - Source Type: **Anywhere**
 - Port Range: **8888**
- Leave the rest as default.

Network settings [Info](#)

Network | [Info](#)
vpc-f12a9c9a | finmars-vpc

Subnet | [Info](#)
No preference (Default subnet in any availability zone)

Auto-assign public IP | [Info](#)
Enable
Additional charges apply when outside of free tier allowance

Firewall (security groups) | [Info](#)
A security group is a set of firewall rules that control the traffic for your instance. Add rules to allow specific traffic to reach your instance.

Create security group Select existing security group

We'll create a new security group called 'launch-wizard-20' with the following rules:

Allow SSH traffic from Anywhere
0.0.0.0/0
Helps you connect to your instance

Allow HTTPS traffic from the internet
To set up an endpoint, for example when creating a web server

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⚠ Rules with source of 0.0.0.0/0 allow all IP addresses to access your instance. We recommend setting security group rules to allow access from known IP addresses only.

See **Edit** in Top Right Corner. Press it

Resource Groups & Tag E... VPC EC2 Route 53 S3

Search results

Type	Protocol	Port range	Description - optional
ssh	TCP	22	e.g. SSH for admin desktop
Anywhere	0.0.0.0/0		
▼ Security group rule 2 (TCP, 80, 0.0.0.0/0) Remove			
HTTP	TCP	80	e.g. SSH for admin desktop
Anywhere	0.0.0.0/0		

See Configured Security groups

- Click **Next: Add Storage.**

9. **Add storage (256 GiB)**

- Change the size from **8** to **256** in the root volume row.
- Keep the volume type as **gp3** or **gp2**.

10. **Review and launch**

- Check all your settings.
- Click **Launch Instance.**

11. **Wait for your VM**

- Click **View Instances.**
- Wait until its status is **running** and checks pass.

12. **Open Finmars Setup in your Web Browser**

- Go to http://Your_Public_IP:8888 (for example <http://203.0.113.25:8888>)
- Proceed with Setup Wizard

Your EC2 named **finmars-platform-vm** is ready! ☐☐

Now you need to assign your Public IP of your freshly created VM to subdomain of your domain.

1. **Sign in to AWS**

Go to console.aws.amazon.com and log in.

2. **Open Route 53**

In the top search bar, type **Route 53**, then click the service.

3. **Go to Hosted Zones**

In the left menu, click **“Hosted zones.”**

4. **Select your domain**

Find and click the zone named your_domain.tld (for example, example.com).

5. **Create the first record**

- Click **“Create record.”**
- In **Record name**, type [finmars](https://finmars.example.com) (so full name is finmars.example.com). - It is Record for Actual Finmars Platform
- For **Record type**, choose **A - IPv4 address.**
- In **Value**, type your EC2 public IP (for example, 203.0.113.25). You can find it in EC2 details
- Leave **TTL** as default (300).
- Click **“Create records.”**

6. **Create the second record**

- Click **“Create record”** again.
- In **Record name**, type [finmars-auth](https://finmars-auth.example.com) (so full name is finmars-auth.example.com). - It is Record for Single-Sign-On (SSO) Finmars
- For **Record type**, choose **A - IPv4 address.**
- In **Value**, type the same EC2 public IP.
- Click **“Create records.”**

7. Wait a few minutes

DNS needs a little time to spread out. After about 5 minutes, both

- `finmars.example.com`
- `finmars-auth.example.com`

will go to your VM's public IP.

That's it! Now both sub-domains point to your **finmars-platform-vm** server.

You can verify it by run following command in Terminal (On Mac or Linux)

```
dig finmars.example.com
dig finmars-auth.example.com
```

Output should be like:

```
; <<>> DiG 9.10.6 <<>> finmars.example.com
;; global options: +cmd
;; Got answer:
;; ->>HEADER<<- opcode: QUERY, status: NOERROR, id: 39082
;; flags: qr rd ra; QUERY: 1, ANSWER: 1, AUTHORITY: 0, ADDITIONAL: 1

;; OPT PSEUDOSECTION:
; EDNS: version: 0, flags:; udp: 4096
;; QUESTION SECTION:
;finmars-platform-vm.finmars.com. IN A

;; ANSWER SECTION:
finmars.example.com. 300 IN A 203.0.113.25

;; Query time: 12 msec
;; SERVER: 192.168.178.1#53(192.168.178.1)
;; WHEN: Wed Jun 11 20:10:02 CEST 2025
;; MSG SIZE rcvd: 76
```

Now go to next step: [Install Finmars Platform](#)

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