

What is Finmars

What included in Community Edition and why to use it?

- For Investors
- For Asset Managers & Family Offices
- For Banks
- Supported Assets (Instrument Types) in Standard Configuration
- Supported Transaction Types (In Standard Configuration)
- Supported Reports
- Marketplace

For Investors

For Asset Managers & Family Offices

For Banks

Supported Assets (Instrument Types) in Standard Configuration

Here is list of Instrument Types in Standard Configuration

- Stock
- Bond
- Derivative
- Forward
- FX Forward Leg
- Option
- Portfolio
- T-bills
- CDS

Supported Transaction Types (In Standard Configuration)

Here is list of supported Transactions if Standard Configuration is used:

- Buy
- Sell
- Deposit
- Withdraw
- Coupon
- Dividend
- Expense (Instrument)
- Other Income (Instrument)
- Expense (Non-instrument)
- Income (Non-instrument)
- FX Forward Open
- FX Forward Close
- FX Trade
- Transfer Cash
- Transfer Instrument

Supported Reports

- Balance Report
- P&L Report
- Transaction Report
- Performance Report

Marketplace

The Finmars Marketplace is like a little app store for our system. Here's how it works:

1. Packages and Modules

- A **package** is a folder that holds one or more **modules**.
- Each **module** is a `.zip` file.

2. What's inside a module?

- A `.json` file with settings and info.
- A `.py` file with the code that makes new features work.
- A `.html` file with any pages or screens the feature needs.

3. Installing a module

- The user uploads or picks a module from the Marketplace.
- The system unzips it and reads the `.json` to know what to do.
- Then it loads the `.py` code so new tools appear in the app.
- Finally, it shows any new pages from the `.html` file.

4. How it extends the system

- Each module adds its own menu items, buttons, or pages.
- Modules can talk to existing parts of Finmars, so they all work together.
- If you don't need a feature anymore, you can uninstall its module, and it goes away cleanly.

With this setup, anyone can build small add-ons (modules) to make Finmars do new things—fast and safe.