

# Setup Access to Financial Data Platforms

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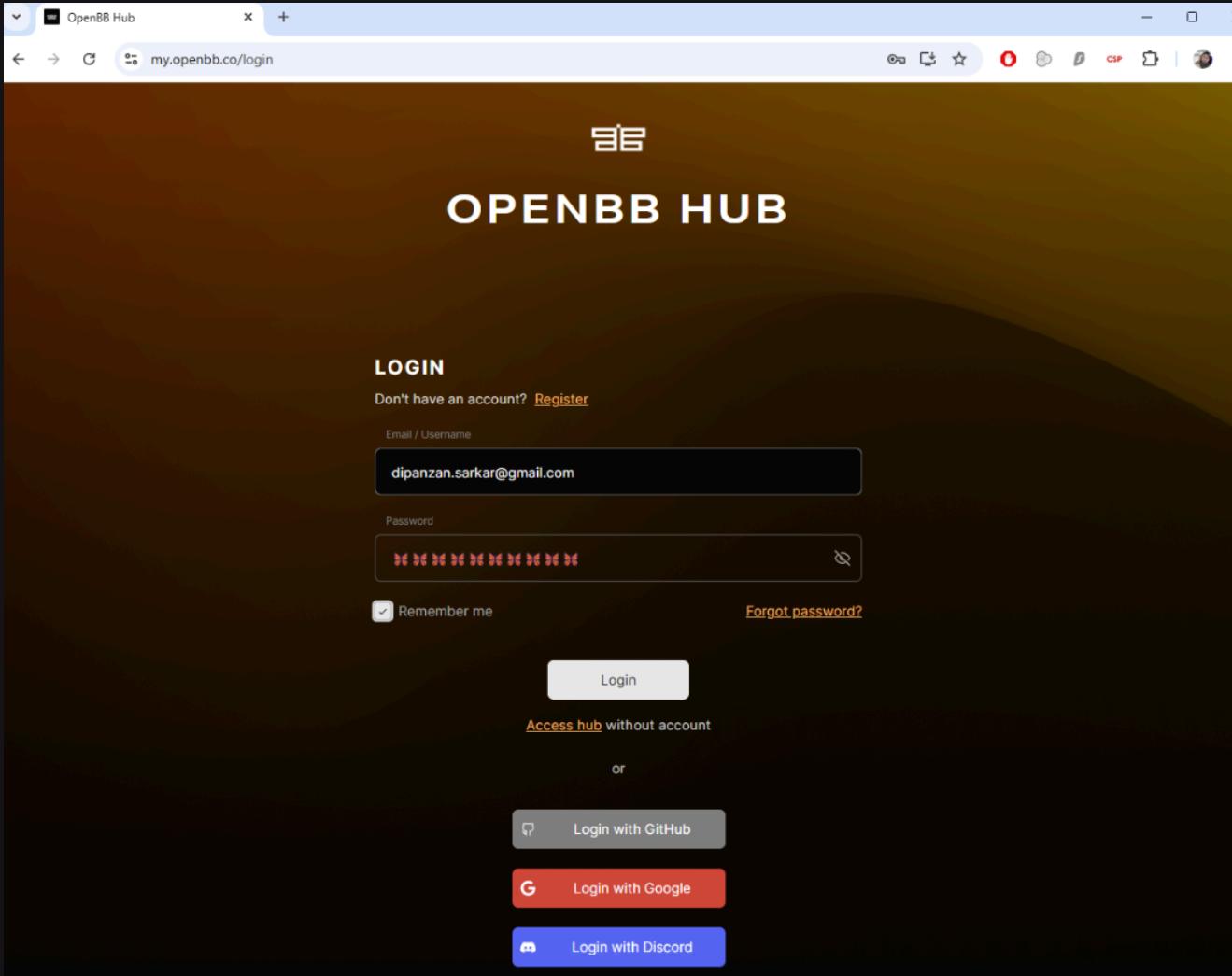
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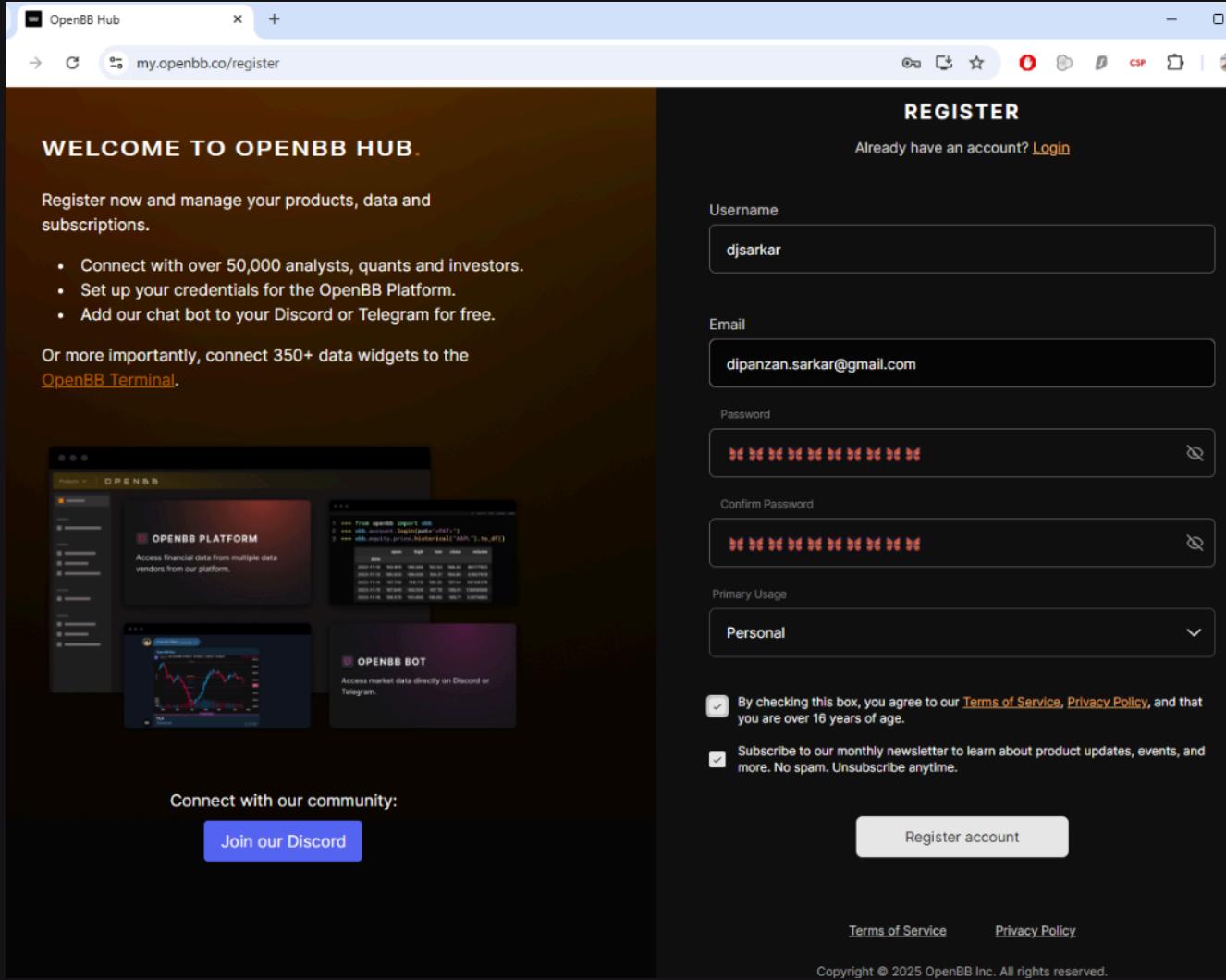
- To build our Financial analyst AI Agent, we will be making use of all the platforms mentioned earlier through OpenBB
- OpenBB is a free and open-source financial data and analysis platform that rivals the famous Bloomberg Terminal
- Account creation and platform setup are required for uninterrupted data access.

# Setup Access to OpenBB



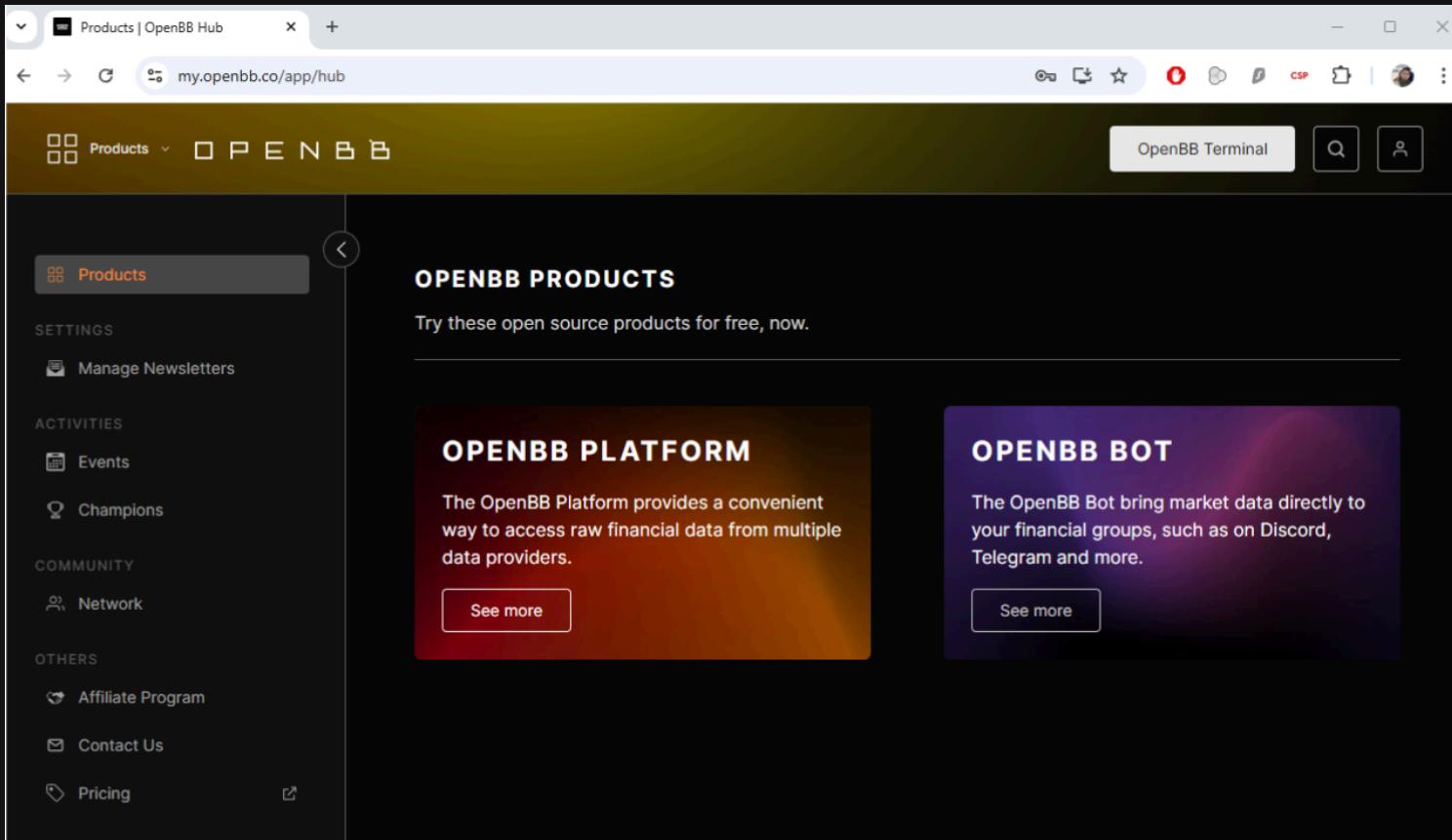
- Go to <https://my.openbb.co/>
- It will open up the login screen by default
- Click on the Register link at the top

# Setup Access to OpenBB



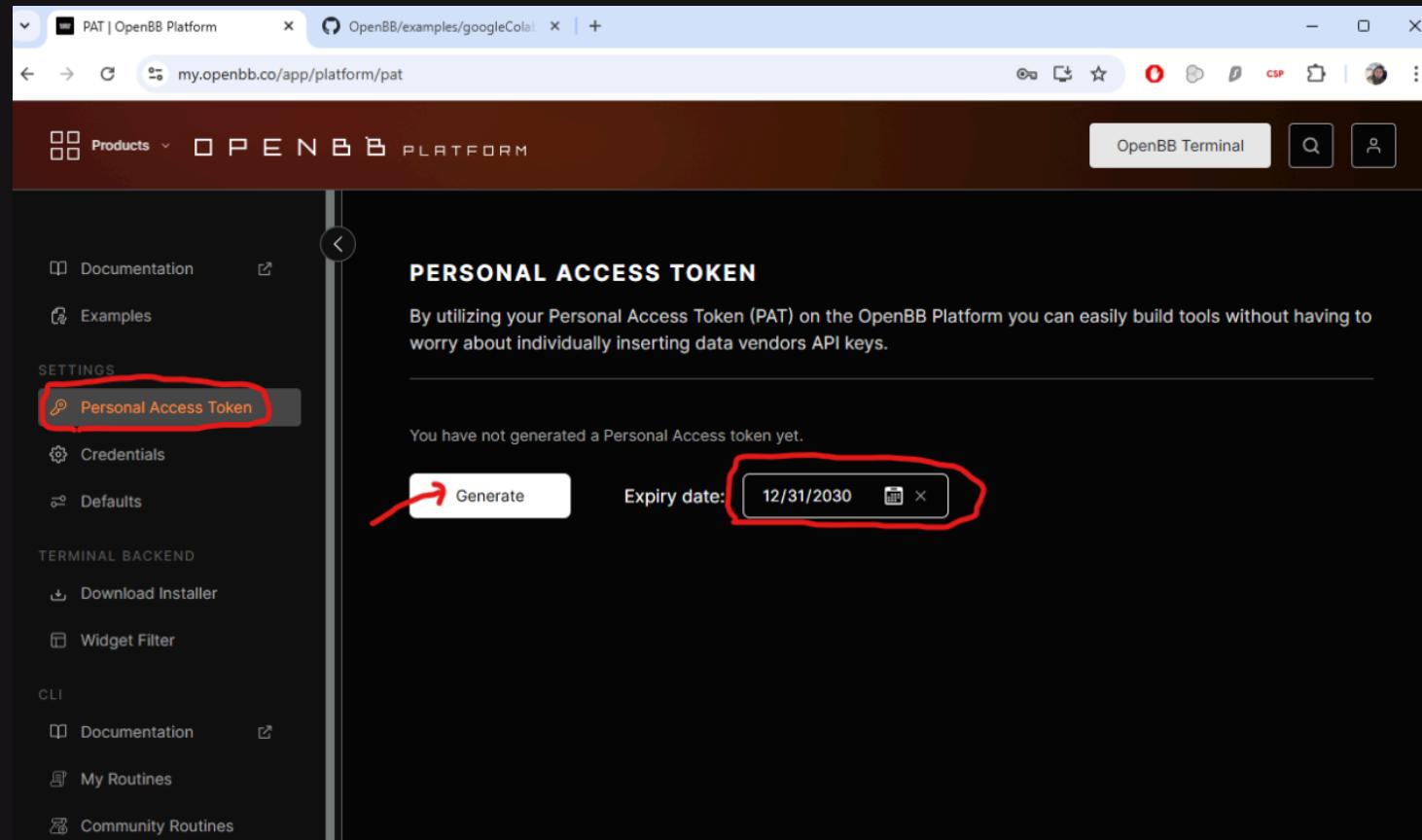
- On the Register page, enter all the details as shown on the right side
- Then click on Register account

# Setup Access to OpenBB



- Click on the OpenBB Platform 'See more' button to go to the OpenBB Platform

# Setup Access to OpenBB



- Click on Personal Access Token on the left side
- Then click on Generate and make sure the expiry date is in the future

# Setup Access to OpenBB

The screenshot shows a web browser window for the OpenBB Platform. The URL in the address bar is [my.openbb.co/app/platform/pat](https://my.openbb.co/app/platform/pat). The page title is "PERSONAL ACCESS TOKEN". The left sidebar has sections for Documentation, Examples, SETTINGS (with "Personal Access Token" highlighted), Credentials, and Defaults. The main content area starts with a paragraph about utilizing a Personal Access Token (PAT) to build tools without inserting API keys. It shows a token field with "....." and a "COPIED" button above it. Below the token is a note that it expires on January 1, 2031. There are "Regenerate" and "Expiry date: 12/31/2030" buttons. At the bottom, there is Python code to log in from a Python environment: 

```
from openbb import obb
obb.account.login(pat=<YOUR_TOKEN>)
```

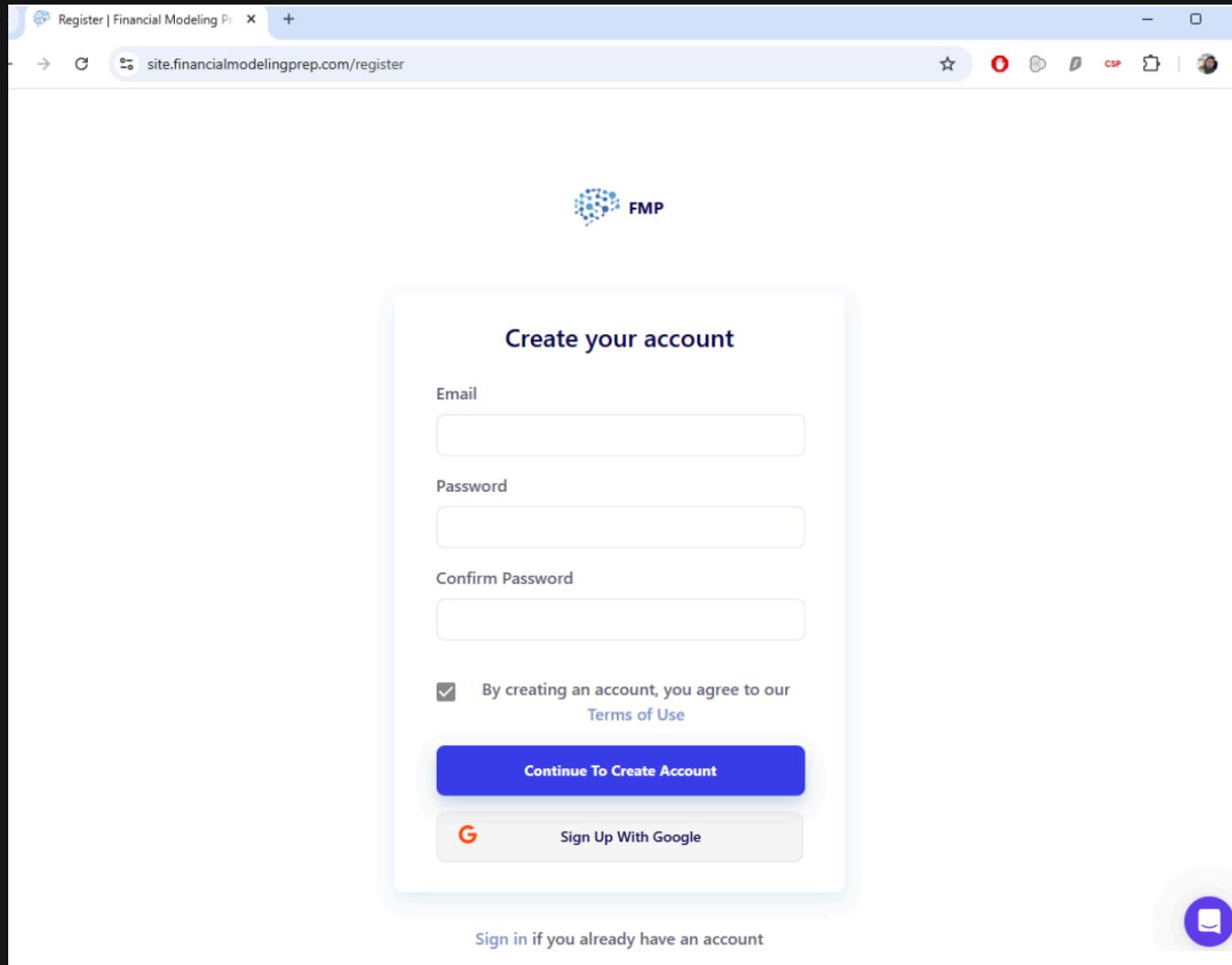
- This access token will act as an API token which we will be using in our AI Agent to access financial data and metrics

# Setup Access to Financial Modeling Prep - FMP

The screenshot shows the homepage of the Financial Modeling Prep (FMP) website. At the top, there is a navigation bar with links for API Tools, Pricing, Blog, Screener, Extras, Sign In, and Sign Up. Below the navigation bar, there is a row of stock tickers and their current prices: 0.49 ▼ -1.53%, QQQ 507.19 ▼ -1.57%, DOW 38.5 ▼ -1.08%, BTCUSD 94353.68 ▼ -0.22625%, EURUSD 1.02491 ▼ -0.5227%, and AAPL 236.85 ▼ -2.41%. The main content area features a large blue banner with the text "Financial data for every need". Below the banner, a paragraph of text reads: "We provide one of the most accurate financial data available on the market. You can get historical prices, fundamental data, insider transactions, and much more that goes back 30 years in history." A "Get started" button is located at the bottom left. At the bottom center, there are two small charts showing price movements for AAPL and FB.

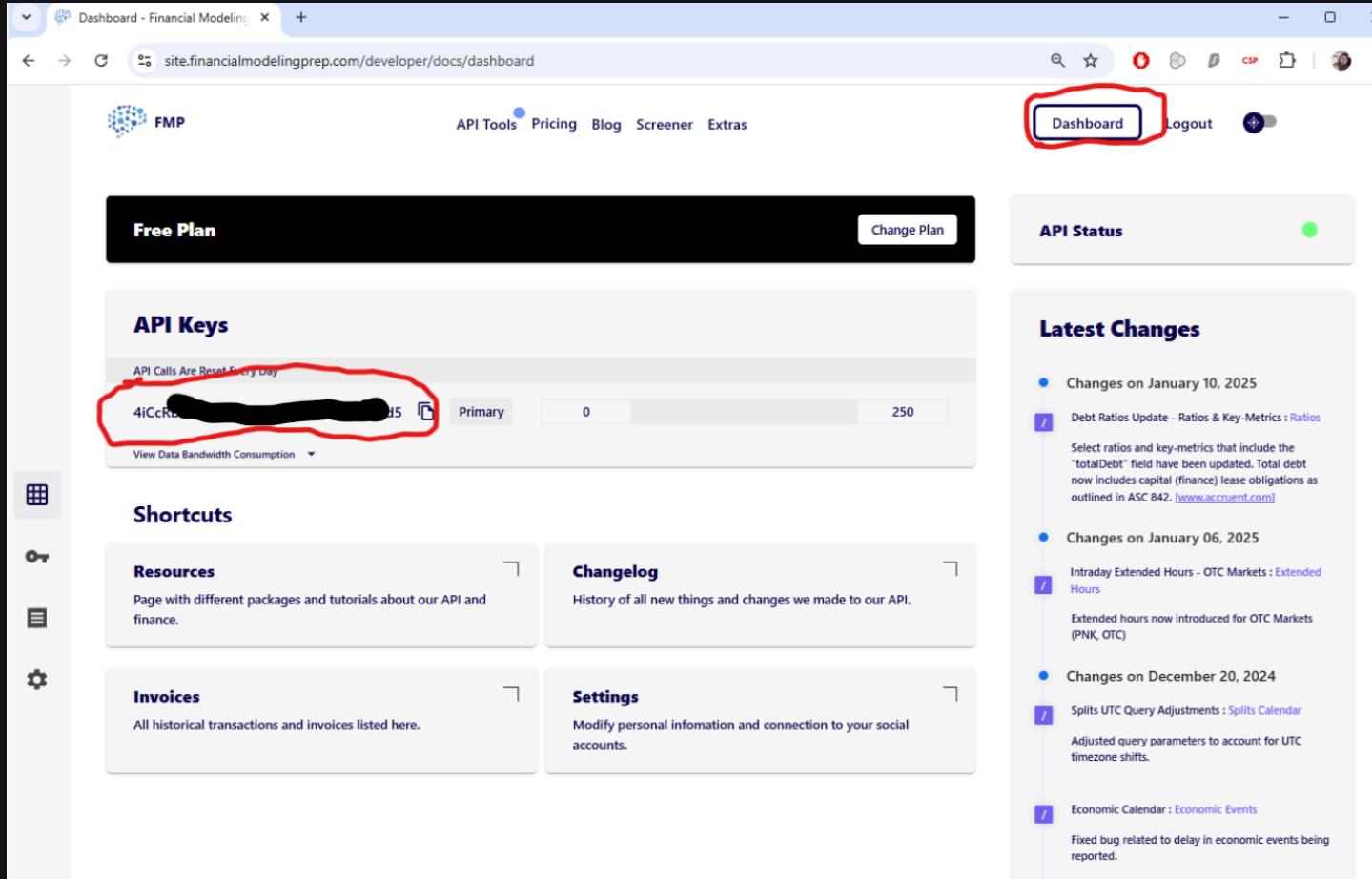
- Go to <https://site.financialmodelingprep.com/>
- Click on the Sign Up button at the top right

# Setup Access to Financial Modeling Prep - FMP



- Enter your details as shown in the screen
- Click on continue to create account

# Setup Access to Financial Modeling Prep - FMP



- Click on the Dashboard button on the top right
- Get your API key as shown here
- We will be entering this into OpenBB as we will access FMP and other platforms directly from OpenBB

# Setup Financial Platform Credentials in OpenBB

The screenshot shows the 'Credentials' page of the OpenBB Platform. On the left is a sidebar with links like Documentation, Examples, Personal Access Token, and Credentials (which is highlighted). The main area has a heading 'CREDENTIALS' and a sub-instruction 'Manage your credentials.' Below this is a note about authenticating requests to data providers. A section for uploading a .env file is shown. The main table lists various API keys with their values. The 'FMP\_API\_KEY' row is selected, and its value is redacted with dots. A confirmation message at the bottom says 'You have unsaved changes!' with a 'Save changes' button, which is also redacted with a red circle.

Name	Value
BENZINGA_API_KEY	(redacted)
BLS.APIKEY	(redacted)
CFTC_APP_TOKEN	(redacted)
ECONDB_API_KEY	(redacted)
EIA_API_KEY	(redacted)
FMP_API_KEY	..... (redacted)
FRED_API_KEY	(redacted)
INTRINIO_API_KEY	(redacted)
POLYGON_API_KEY	(redacted)
TINCO_TOKEN	(redacted)
TRADINGECONOMICS_API_KEY	(redacted)

- Go back to OpenBB's Platform and click on Credentials
- Enter the FMP API key from earlier in the text box shown and click on Save Changes
- In the same way you can also connect other financial platforms to OpenBB
- This is useful because then you just need one access token (OpenBB) and use that to access all other platforms also

# Thanks