Claude Code in Obsidian

MGMT 675: Generative AI for Finance

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Why Obsidian?

Obsidian is a free, local-first note-taking app built on plain markdown files. Your notes are just files in a folder—no cloud lock-in, no proprietary format.

Key Features

- Plain markdown files on your computer
- Wiki-style [[backlinks]] between notes
- Rich plugin ecosystem (2,000+)
- Graph view of note connections
- Works offline, syncs via any method

Why It Pairs Well with AI

- Files are plain text—AI can read and edit them directly
- Folder structure = project organization
- No API needed—just read/write files
- CLAUDE.md at vault root gives Claude context every session

Obsidian + Claude Code: The Idea

Combine Obsidian's note-taking strengths with Claude Code's agentic capabilities. Claude can read, write, search, and organize your entire vault—from inside Obsidian.

- "Summarize my meeting notes from this week"
- "Add backlinks to all people mentioned in my journal entries"
- "Create a research brief from these three papers"
- "Reorganize my project notes into a cleaner folder structure"
- "Generate a weekly review from my daily notes"
- **Claude works directly on your files—results stay in your vault**

Three Ways to Connect Claude Code to Obsidian

1. Claudian Plugin

- Full Claude Code agent inside Obsidian
- Reads/writes vault files
- Runs bash commands
- Vision support (images)
- **Recommended**

Install from Community Plugins

2. Terminal Plugin

- Adds a terminal pane to Obsidian
- Run `claude` CLI directly
- Full Claude Code experience
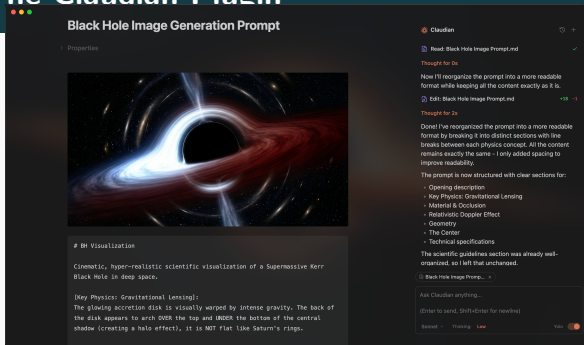- Also run Python, git, etc.
- Lightweight approach

Search "Terminal" in plugins

3. MCP Server

- Claude Desktop reads your vault via MCP
- `mcp-obsidian` server
- Tools: search, read, write, append, delete
- Works from Claude Desktop

Best for Desktop app users

The Claudian Plugin

Features

- Claude Code agent in sidebar
- Reads and edits your notes
- Runs bash commands
- Drag-and-drop image analysis
- Model selector (Opus, Sonnet)
- Shows diffs for file edits

Install: Settings → Community Plugins → search "Claudian" → Install → Enable
Requires: Anthropic API key

Setting Up Your Vault for Claude

Vault Structure

```
my-vault/
  CLAUDE.md      <- Key file
  .claude/
    commands/
      day.md
      research.md
      brainstorm.md
  journal/
  research/
  projects/
  entities/
```

CLAUDE.md: Your AI Instructions

- Placed at vault root
- Claude reads it every session
- Contains: vault conventions, note format, tagging rules, workflows
- Think of it as a **skill for your vault**

Commands Folder

- /day — create today's daily note
- /research — start a research note
- /brainstorm — guided brainstorm
- Reusable slash commands in markdown

Example: CLAUDE.md for a Finance Vault

CLAUDE.md (Sketch)

```
# My Finance Knowledge Base

## Vault Conventions
- Daily notes go in journal/ with format YYYY-MM-DD.md
- Research notes go in research/ with YAML frontmatter
- Use [[backlinks]] to connect people, companies, and concepts
- Tags: #earnings, #valuation, #macro, #reading

## Task Format
- [ ] [#tag] Task description | added YYYY-MM-DD

## Workflows
- "weekly review": Scan journal/ for the past 7 days, summarize
- "add task": Append to tasks.md in the appropriate category
- "research brief": Read files I specify, produce a structured summary
```

This file is loaded into Claude's context automatically—it's the same concept as a **skill**, applied to your personal vault.

Workflows: What Can You Do?

Knowledge Management

- Auto-add backlinks to entities
- Generate summaries from daily notes
- Tag and categorize notes
- Build reading lists from highlights
- Create indexes and MOCs (Maps of Content)

Task & Project Management

- Manage task lists by category
- Weekly reviews from journal entries
- Track action items across meetings
- Generate project status updates

Research

- Summarize papers into structured notes
- Extract key findings across sources
- Generate literature review outlines

Content Creation

- Draft documents from notes
- Convert rough notes into polished prose
- Generate slide outlines from research
- Create structured templates

MCP Server: Claude Desktop + Obsidian

If you prefer using **Claude Desktop** (rather than a plugin inside Obsidian), you can connect to your vault via an MCP server.

mcp-obsidian

- Connects via Obsidian's REST API
- Tools: `list_files`, `get_file_contents`, `search`, `patch_content`, `append_content`
- GitHub: MarkusPfundstein/mcp-obsidian

Alternative: Just Use the Filesystem

- Obsidian vaults are just folders
- Point Claude Code at your vault directory
- No MCP server needed—Claude reads/writes files directly
- Add `CLAUDE.md` and go

Simplest approach: Open Claude Code in your vault folder. No plugins or servers required.

Getting Started

1. **Install Obsidian**: Free at `https://obsidian.md`
2. **Create a vault**: Pick a folder for your notes
3. **Add CLAUDE.md**: Write your vault conventions and workflows
4. **Choose your integration**:
   - Claudian plugin (richest experience inside Obsidian)
   - Terminal plugin (lightweight, run `claude` CLI)
   - Claude Code CLI pointed at your vault folder (no plugin needed)
5. **Start working**: "Summarize my notes from today" or /day

Further Reading:
Claudian plugin (GitHub) · mcp-obsidian (GitHub) · Obsidian × Claude Code workflows