

Presentation will begin at 12:03GMT

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# Global Webinar for Third-Party Providers / Complementors



September 2023  
Complementors Team &  
Securities Product  
Management

# Agenda

1. Admin notices
2. Swift Securities Focus from Simon Daniel and Didier Hermans
  - Unique Transaction Identifier (UTI) - Implementation & Market practice
  - Swift Securities View
3. Platform Partnership Programme from James Moore
4. Questions

## Admin notices

- This presentation is being recorded
- The content will be published on SWIFT.com (<https://www.swift.com/standards/iso-20022/iso-20022-past-webinars>)
- Global webinar for third-party providers occur the last Thursday of every month and you can register 2 weeks before each event here: [Transaction Management Global Webinar for 3rd Party Providers](#)
- To ensure you receive communications from us while we remain GDPR compliant please [update your preferences here](#) (you will need to login to / create your free SWIFT account) to include the interests 'Payments' and/or 'Standards' and we will ensure we keep you informed about:
  - Global webinar for third-party providers Invitations
  - Relevant developments on ISO 20022 and Transaction Management
  - Updates from SWIFT's Market Practice team
  - The latest info on adoption enabling tools and support
- Support requests / queries should be raised via the [Support](#) page
- Queries regarding gpi portfolio certification/ self-attestation processes should be directed to new e-mail address: [provider.readiness@swift.com](mailto:provider.readiness@swift.com)

# Swift Securities Focus



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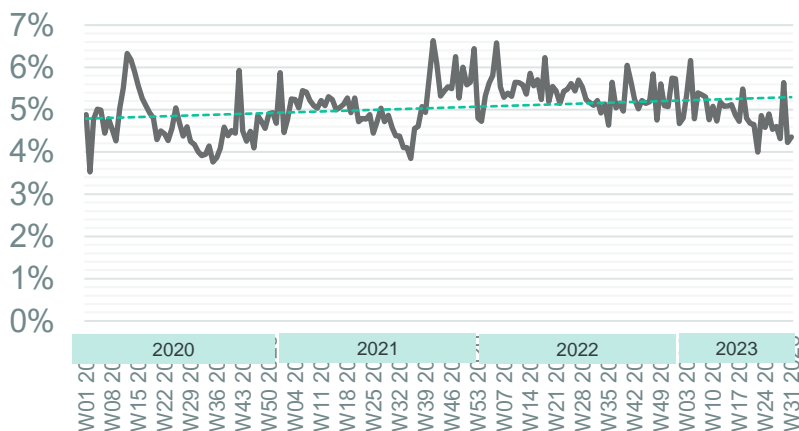
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# An industry focus on settlement efficiency: frictionless and faster

## Observations on CSDR post-implementation

**Over 1m** Penalties/month (2022)  
**~ 1.55 Bn** EUR (Feb – Dec 2022)

Late Settlement Rate reported by trade confirmations on Swift network



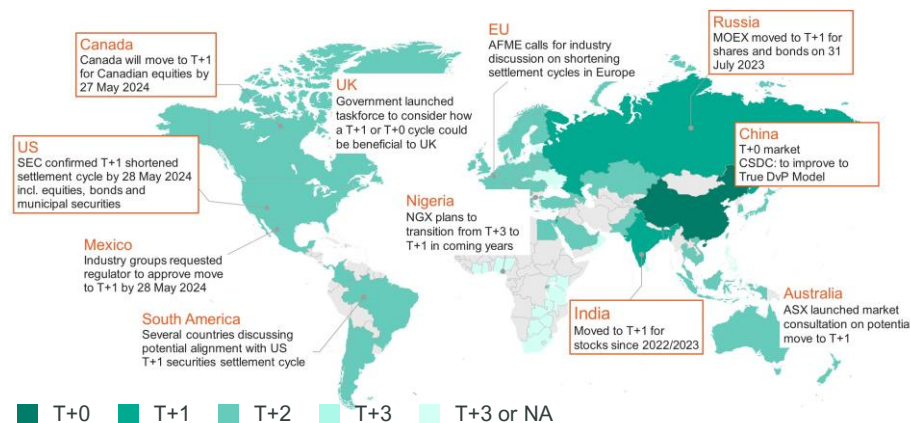
### Challenges

- Timing: counterparty instruction missing / on hold / late
- Discrepancies: counterparties economic or SSI data differ
- Inventory: insufficient securities (or cash) on settlement

## Shorter settlement cycle across markets

**~83%** Reduction of processing time  
**stricter** Instruction receipt deadlines and SLAs

Major equity markets are exploring feasibility of accelerated settlement

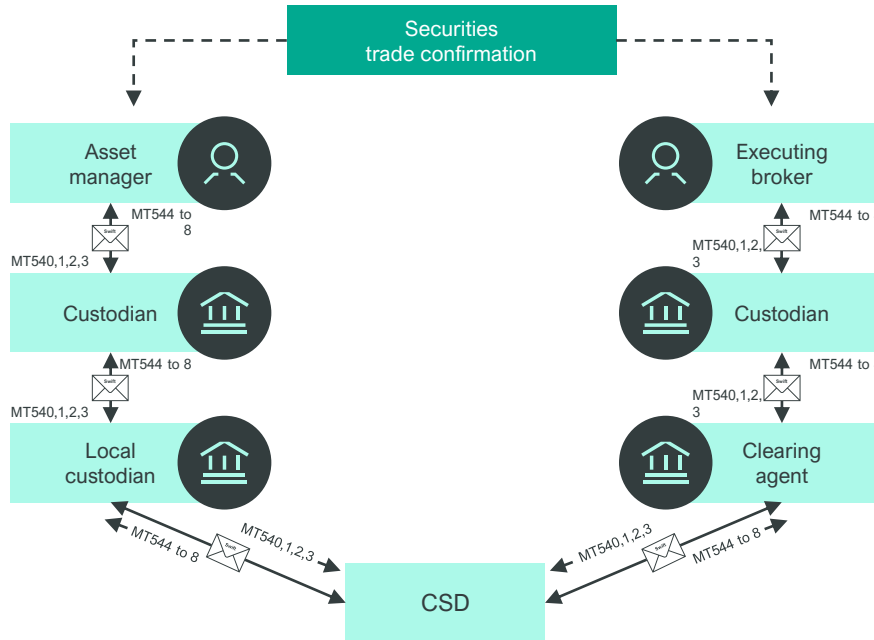


### Challenges

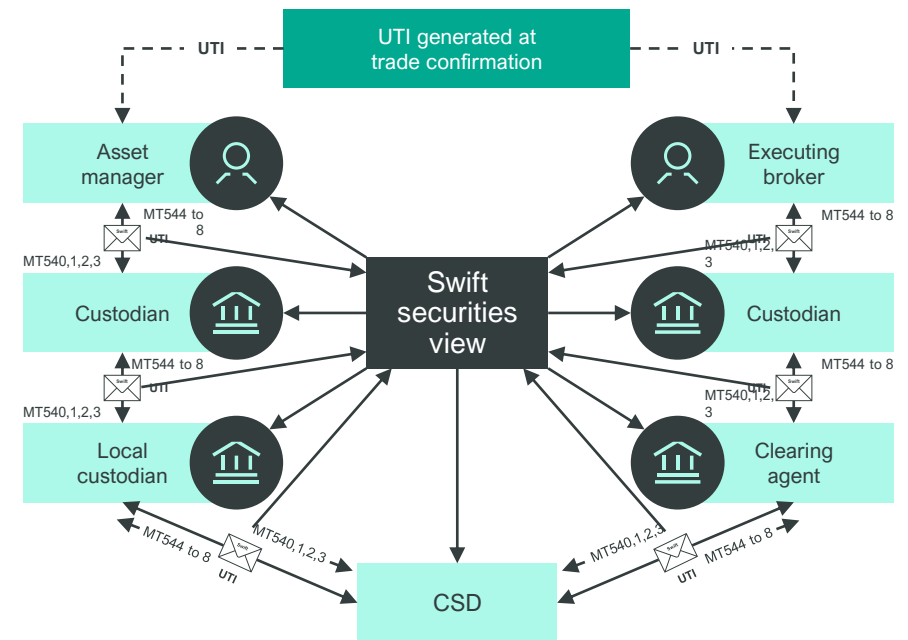
- Time zone challenges, Settlement; fails, penalties, buy-ins, claims
- Booking, allocation, confirmations, affirmation processes Rule 15c6-2(a)
- Instrument focus: ETF, depository receipts, securities financing
- FX, funding/liquidity management

# Yesterday versus Today

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From isolated messaging



To transaction visibility

# Tracking and transparency in securities settlement

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## Functional benefits



### Data

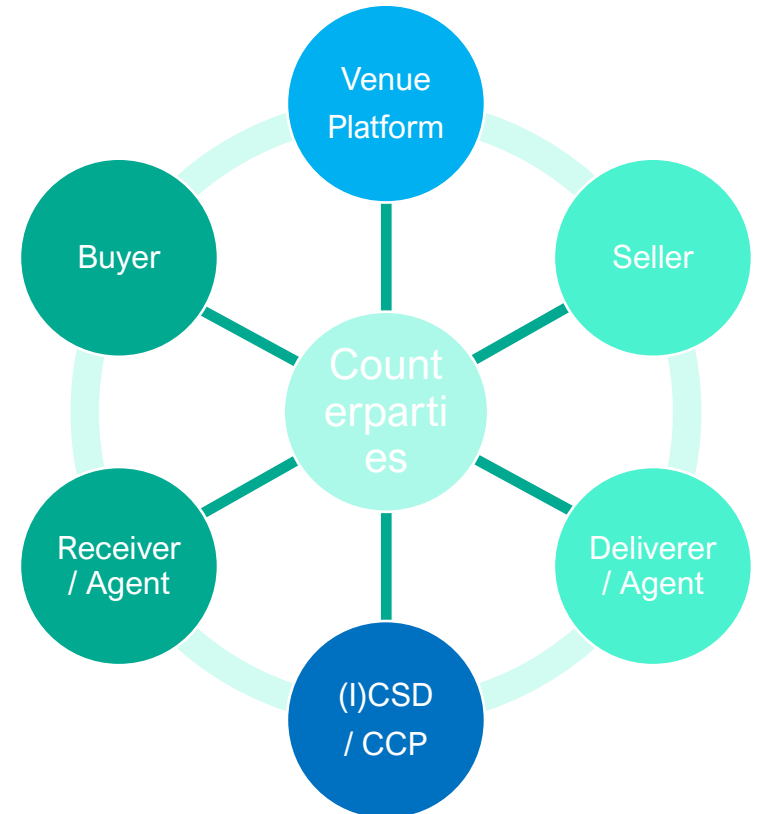
Provides more settlement information **reciprocally between counterparties**

### Speed

Enables parties with **settlement data** and status information earlier

### Certainty

Improves **consensus** and precision of **settlement likelihood**



## Securities View and the case for the UTI

80+

Firms subscribed  
and using  
**Securities View**  
since 30 January 2023

150+

Representing more  
than 150 BICs

50+

BIC's sending Swift  
messages  
with UTI through  
**Securities View**

**Discussion paper on the case of the UTI**  
published with the support of DTCC, AFME, ISSA,  
ISDA, SIFMA, ISITC and the SMPG

Published the **UTI market guidelines  
and implementation Summary to generate  
and communicate the UTI** for securities trades  
(next iteration will include collateral, lending  
and borrowing transactions)

**Major vendors** are getting ready for the UTI.

**DTCC ITP & Swift** are collaborating to support  
industry goals and are aligned with the usage and  
generation of the UTI



# Unique Transaction Identifier (UTI) Implementation & Market practice






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# The Unique Transaction Identifier (UTI)

ISO 23897:2020 definition  
 Up to 52 alphanumeric characters, **(A to Z and 0 to 9 only)**.  
 First **20 characters** (18!c and 2!n:fixed length)  
 the legal entity identifier of the generating entity, as represented in ISO 17442 – aka LEI  
 Subsequent **up to 32 characters** (32c:maximum length)  
 a unique identifier assigned to the transaction by the generating entity without separators.

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<h3>Unique</h3> <p>52 characters, with first 20 to be the LEI of the generating body (FI / platform / service provider)</p> 	<h3>Standard</h3> <p>Standardised and structured ISO-registered format (ISO 23897:2020)</p> 	<h3>Trusted</h3> <p>Already used today for reporting of financial transactions to any authority in any jurisdiction</p> 	<h3>Persistent</h3> <p>Can be carried as a reference across disparate systems and processes</p> 	<h3>Unambiguous</h3> <p>Can be referenced unambiguously by all parties involved or interested in that transaction</p> 
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Applied to a securities post trade settlement workflow, a UTI identifies a securities transaction obligation:

- Between a buyer and seller
- For an agreed instrument and quantities
- Allocated to settlement accounts and parties

Industry standards and best practice on UTI generation and communication:

- [IOSCO](#)
- [ESMA](#)
- [ISDA](#)
- [GFMA](#)

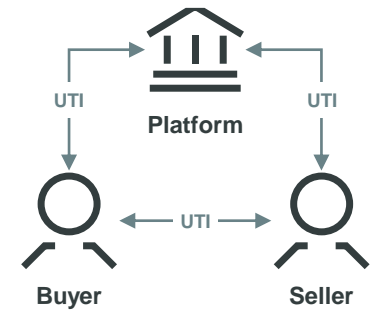
# UTI flow through the settlement lifecycle for securities trades

## Generation, exchange and communication

### Generation and exchange

Between **buyers** and **sellers** occurs as part of post-trade allocation / confirmation process via:

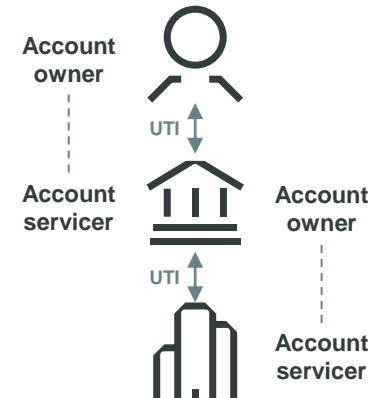
- Central generation by trade venues / matching platforms
- Bi-lateral generation by instructing / executing party or their service provider



### Communication

Between **account owners** and **account servicers**




- **Persist** UTI from received instructions / confirmation process down settlement chain
- **Echo** UTI on settlement 'status and confirmation' response messages to account owners






# UTI generation and communication guidelines: Summary

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## In case of a trade with allocation:

	Via a <b>UTI-ready</b> central platform 	Via a <b>non UTI-ready</b> central platform 	Bilaterally 
The UTI generator & communicator is...	<ul style="list-style-type: none"> <li>The central platform*</li> </ul>	<ul style="list-style-type: none"> <li>The instructing party or their service provider</li> </ul>	<ul style="list-style-type: none"> <li>The instructing party or the service provider</li> </ul>

## In case of a trade without allocation:

	Via a <b>UTI-ready</b> venue 	Via a <b>non UTI-ready</b> venue 	Bilaterally 
The UTI generator & communicator is...	<ul style="list-style-type: none"> <li>The venue</li> </ul>	<ul style="list-style-type: none"> <li>The executing party or their service provider</li> </ul>	<ul style="list-style-type: none"> <li>The executing party or their service provider</li> </ul>

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Exceptional cases (\*):

- If trades are executed and allocated over a central platform but instructing parties or their service providers wish to generate the UTI in **all** their trades, then the central platform should (only) be used to communicate the UTI to the executing party.
- If a central platform/venue is not supporting UTI-generation yet but it does generate a shared common reference, then the instructing **and** executing party can derive a same UTI from this reference.



## UTI generation and exchange for Institutional Flow

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### UTI exchange via

#### allocation

Via a **UTI-ready**  
central platform



Via a **non UTI-ready** central  
platform



Bilaterally



The UTI generator & communicator is...

- The central platform\*

- The instructing party or their service provider

- The instructing party or the service provider

### Supported allocation messages

Format	Message Name	Field Name	Link
FIX	[AllocationInstruction]	Tag1903	<a href="#">more info</a>
SWIFT	MT 514	Field 20a (Option U)	<a href="#">more info</a>
XML (CTM)	Trade Detail	<AllocationUTI>	<a href="#">more info</a>

## UTI continuance across settlement transactions life cycle events

- ❑ **The UTI remains the same**  
across its whole settlement life cycle  
e.g.: status updates, cancellation, replacement, partial settlement...
  
- ❑ **Exception:**  
Some activities may require the initiation of a new transaction with a new UTI  
e.g. bilateral netting
  - Recommendation :  
Use the UTI of the last confirmed instruction that was part of the net - where the last instruction can be identified by sorting the UTI values alphanumerically.

# Leveraging a common trade reference

## The unique transaction identifier or UTI

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### UTI: Unique Transaction Identifier



ISO: Unique number/reference of a financial transaction to be allocated as agreed among the parties and/or within the initiative or regulatory system under which it is formed

```

:16R:GENL
:20C::SEME//MESSAGEREERENCE
:23G:NEWM
:16R:LINK
:20C::TRRF//1256356365
:16S:LINK
:16R:LINK
:20U::TRRF//1256356365ABCDEFEJKEJEKJEKJEKJEKE
:16S:LINK
:16S:GENL
    
```

**Example**

### Where to find an UTI in the MT54X?

541 Receive Against Payment (SR2021)			
General Information (A)	GENL	M	N
:16R: Start of Block	GENL	M	N
> :20C: Reference	:4lc//16x	M	N
> :23G: Function of the Message	4lc[/4lc]	M	N
> :98a: Date/Time		O	N
> :99B: Number Count		O	R
Linkages (A1)	LINK	O	R
:16R: Start of Block	LINK	M	N
> :22F: Indicator	:4lc[/8c]/4lc	O	N
> :13a: Number Identification		O	N
> :20u: Reference		M	N
> :36B: Quantity of Financial Instrument		O	N
:16S: End of Block	LINK	M	N
:16S: End of Block	GENL	M	N



Deal [TRRF]	1	Or	N
> :20C:	:4lc//16x		
> :20U:	:4lc//52x		
Qualifier	4lc	M	N
UTI Reference	52x	M	N

## UTI - in CTM example

### Allocation UTI Generation:

DTCC LEI + IM CTMDetailID + EB CTMDetailID

#### Example:

549300TXA3WBLB9JHZ8814939556931493955510

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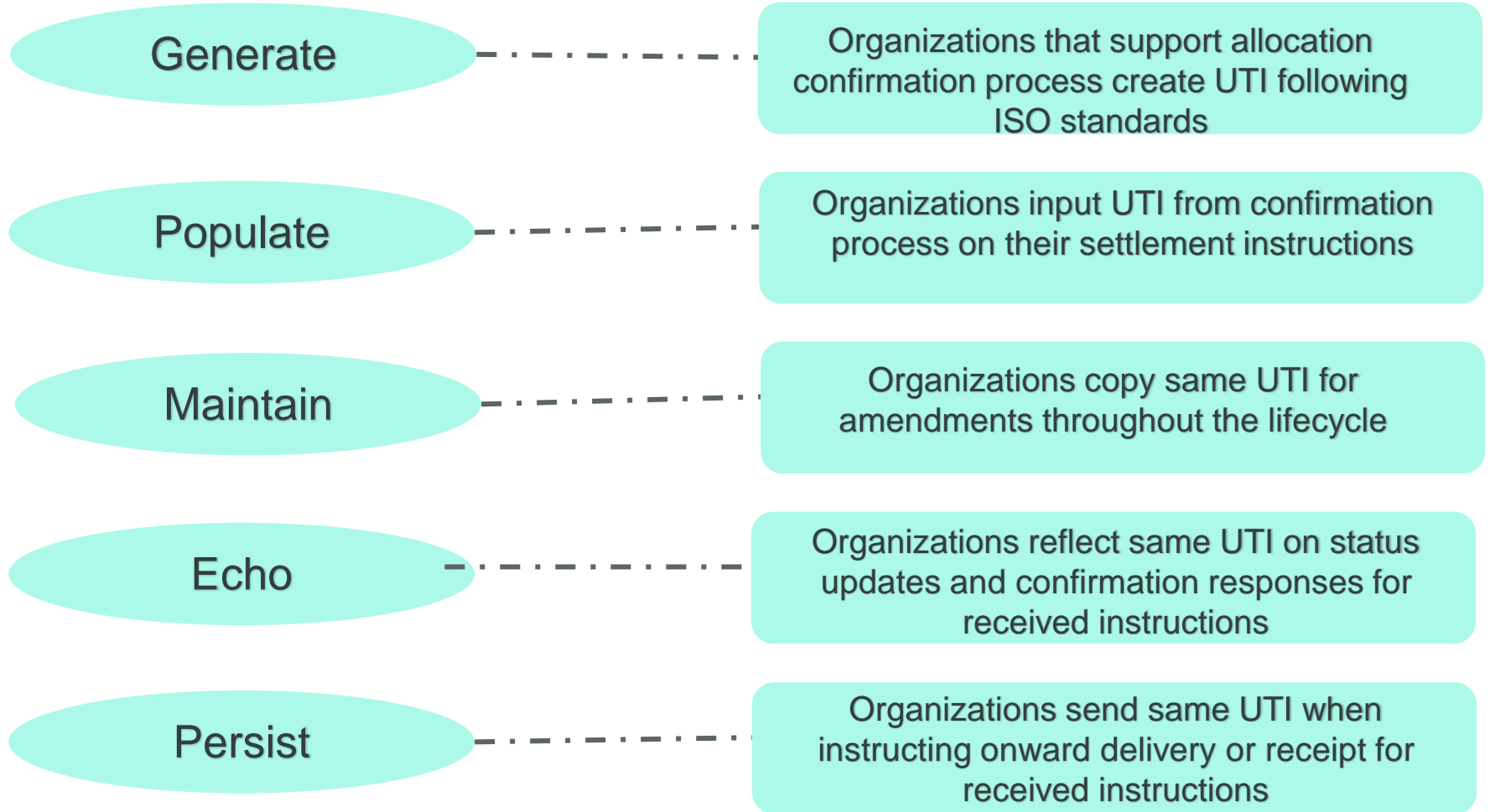
Trade Side Details									
Both Sides My Side Counterparty									
Master Ref	CTM Trade...	Block UTI	Match Agrd	Block Status	Exec Broker	TLPSET	Complete	Asset Clas	
IM20211125...	1527483255	549300TXA3WBLB9JHZ8815274832551527483261	NMAG	MACH	ITP LLC - CT...		INCP		E
EB20211125...	1527483261	549300TXA3WBLB9JHZ8815274832551527483261	NMAG	MACH	ITP LLC - CT...	DTCYUS33	INCP		E
Client Alloc Ref	Allocation UTI	Alloc Status	Qty Alloc	Acct ID ▲ 1	Trd Amt	Co			
001	549300TXA3WBLB9JHZ8815274832661527483264	MACH	50.0	0108	500.00				
001	549300TXA3WBLB9JHZ8815274832661527483264	MACH	50.0	0108	500.00				

```
<TradeDetailReferences>
  <ClientAllocationReference>002</ClientAllocationReference>
  <CTMTradeDetailID>1513469880</CTMTradeDetailID>
  <AllocationUTI>549300TXA3WBLB9JHZ8815134698731513469880</AllocationUTI>
</TradeDetailReferences>
```



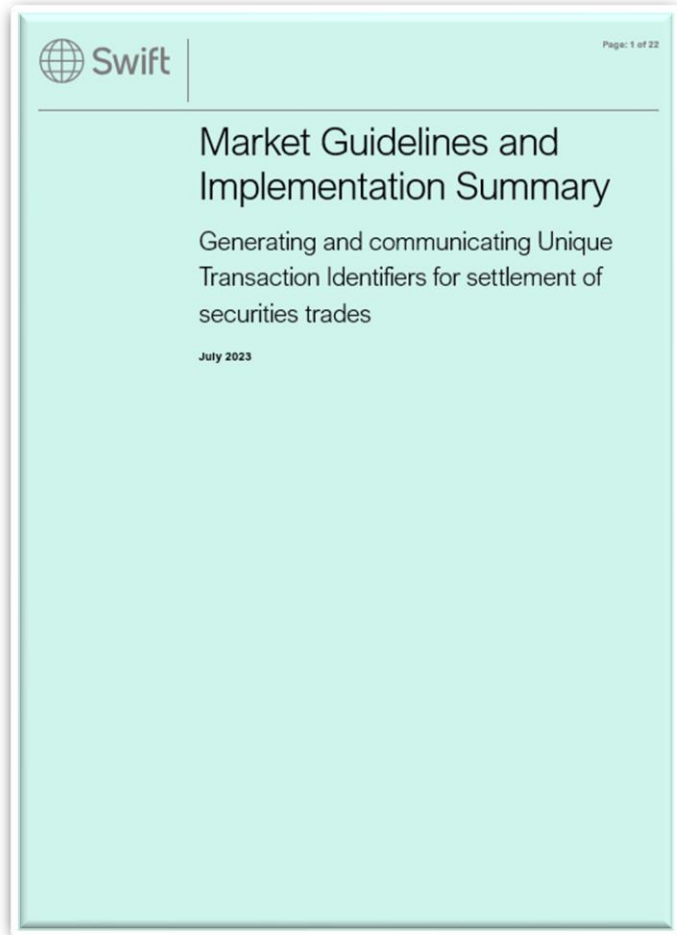
## UTI behaviours through the securities settlement lifecycle - Summary

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# The UTI – Market Guidelines and Implementation Summary

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- Everything you need to know about the UTI:
- how to capture it from a central matching platform
  - How and who to generate it in your bilateral trades
  - how to communicate it across your settlement parties

Available on [www.swift.com](http://www.swift.com) – UTI page

# Swift Securities View

## Solving the post trade settlement challenge

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## Time to tackle settlement inefficiencies!

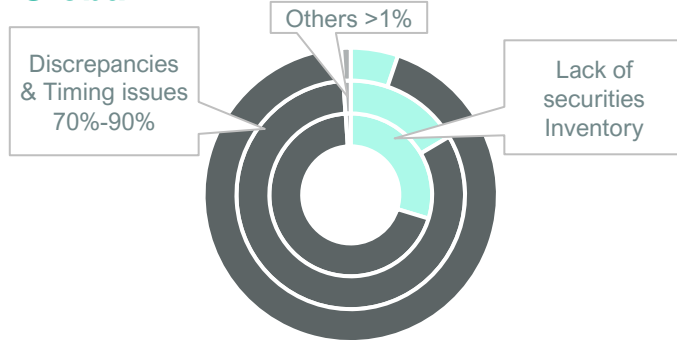
**~15%**  
of settlement instructions  
require manual intervention

### Key settlement issues:

- **Timing:** Counterparty instruction missing / on hold / pending  
NMAT:CMIS PEND:PRCY/PREA/PRSY
- **Discrepancies:** Counterparties have different economic or SSI data  
NMAT:DDAT/DQUA/DMON/SAFE
- **Inventory:** Settlement party(s) has insufficient securities (or cash) at time of settlement  
PENF:LACK/MONY/AWSH

### Pre-settlement Issues

#### Global



### Settlement Fails

#### Global



## Service Use Cases

### Community identified scenarios for operational efficiency improvements

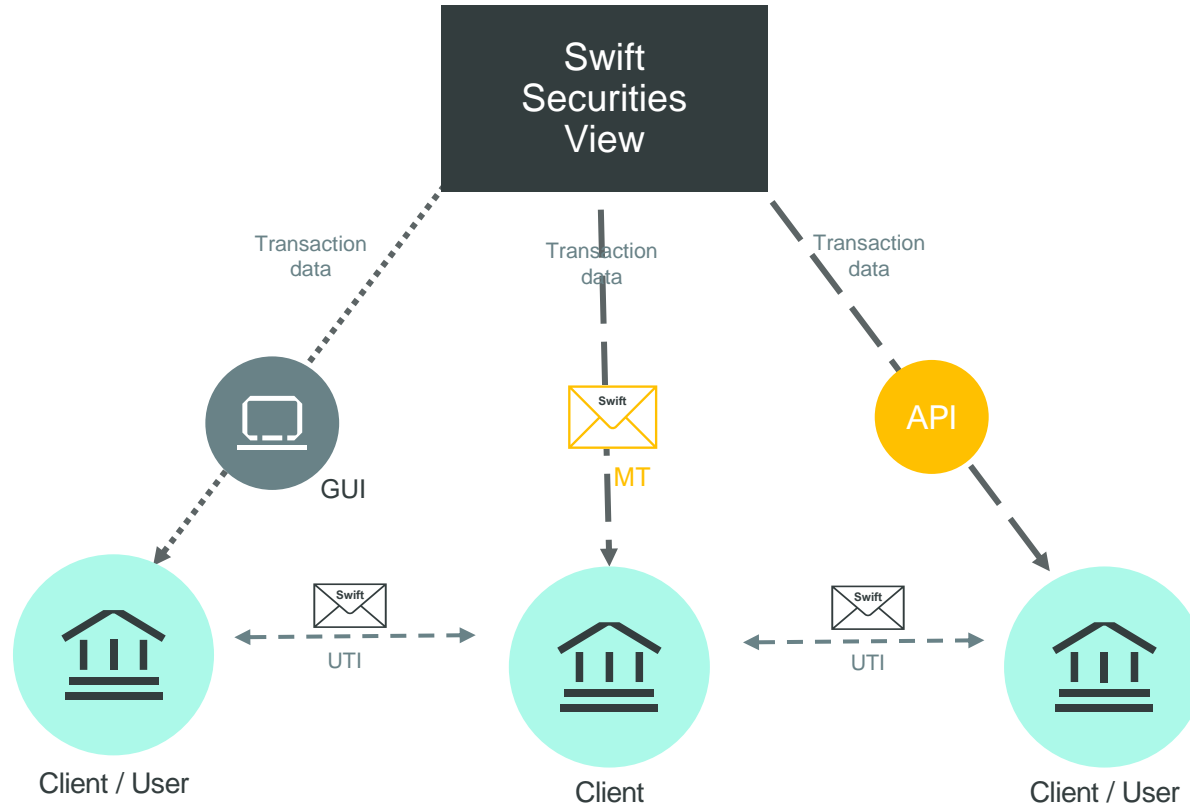
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Use Case	Description	Advantages
Real – time tracking	Improved transparency on own instructions upstream, downstream and visibility into counterparties progress	Improve timing gaps in custody network Transparency as a multi-party workflow
Allegation	Depository allegation messages do not (usually) include the original Buyer / Seller	Identify source of allegation with counterparty view and pair with own instruction
Counterparty missing	Current status has 3 potential scenarios <ul style="list-style-type: none"> <li>Counterparty not instructed / initiated</li> <li>Counterparty instruction in progress</li> <li>Counterparty has different settlement location</li> </ul>	Counterparty missing (CMIS) status is improved with clarity from counterparty view
Discrepancy & Resolution owner	Identify discrepancies between counterparty instructions and indicate which side has responsibility to resolve	Earlier awareness of settlement matching issues. Clarity on which party needs to take action
Feed data to exception platform	Automatically populate exception systems with data from both parties and latest status	Supplement existing feeds with additional data, and updates to drive resolution
Validation	Locally compare counterparty data to own data to identify SSI & business element issues	Identify when counterparty has your incorrect SSI, or different economics prior to instructing
Audit trail	Visibility on the history for a transaction for claim investigations and audit	Identify bottlenecks, and counterparty steps

# Service communication channels

## Integration and automation options

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# 2-sided Settled Transaction

🕒 Your time zone: GMT+1:00

## Securities transaction view

Mark as to do

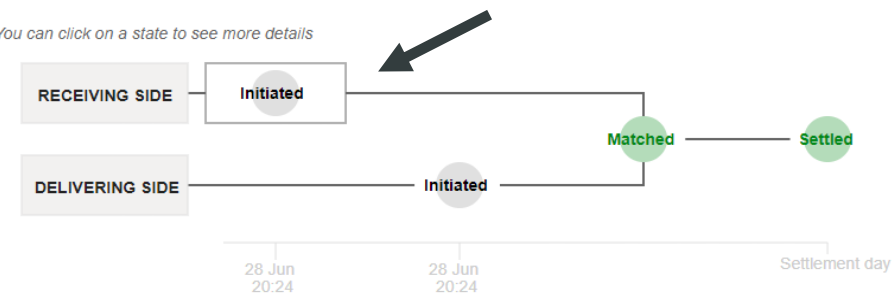
📌 Annotate

📄 Export view

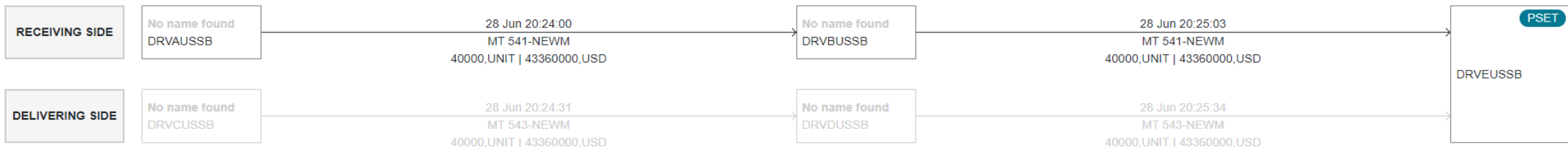
Latest transaction state	Instruction type	Financial instrument ID	Settled amount	Settled quantity	Settlement date	Trade date	Unique Transaction Identifier (UTI)
<b>Settled</b> 28 Jun 20:27	RVP				<b>30 Jun 2023</b>		
<b>Settled</b> 28 Jun 20:27	DVP	ISIN US3453708600	43,360,000.00 USD	40000, UNIT	Eff. settlement date <b>30 Jun 2023</b>	<b>28 Jun 2023</b>	F(iclVbquqC8.SzOZ2xky)XpCNUxmTze0PcT5oE7TJ.Nnn 1mWQY

✅ Latest state on both sides: Settled

You can click on a state to see more details



- Parties
- State details**
- Detailed history and export



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Your time zone: GMT+1:00

## Securities transaction view

Mark as to do

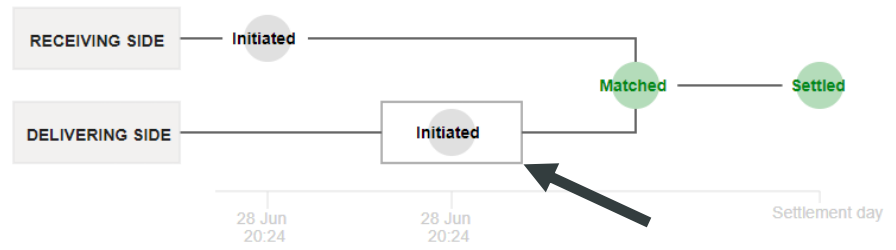
Annotate

Export view

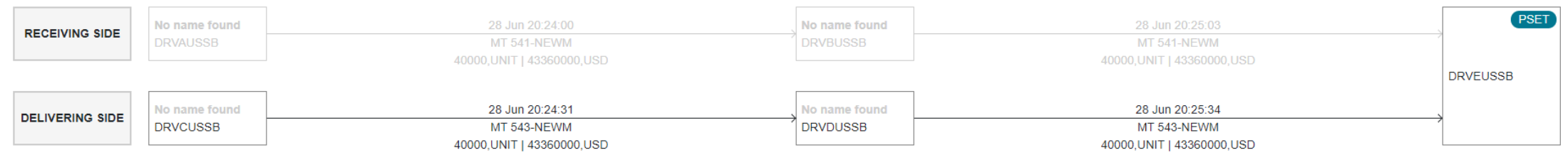
Latest transaction state	Instruction type	Financial instrument ID	Settled amount	Settled quantity	Settlement date	Trade date	Unique Transaction Identifier (UTI)
<b>Settled</b> 28 Jun 20:27	RVP	ISIN US3453708600	43,360,000.00 USD	40000, UNIT	30 Jun 2023 Eff. settlement date 30 Jun 2023	28 Jun 2023	F(iclVbquqC8.SzOZ2xky)XpCNUxmTze0PcT5oE7Tj.Nnn 1mWQY
<b>Settled</b> 28 Jun 20:27	DVP						

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- Parties
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Your time zone: GMT+1:00

## Securities transaction view

Mark as to do

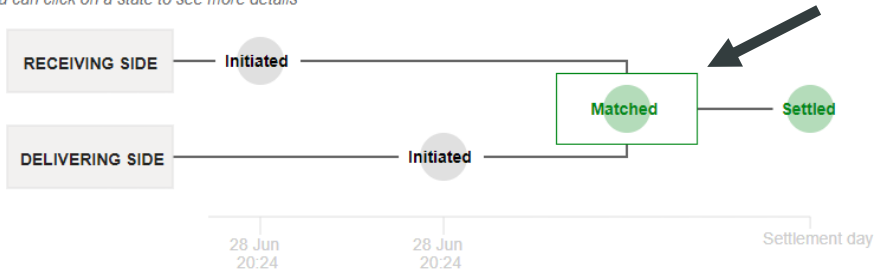
Annotate

Export view

Latest transaction state	Instruction type	Financial instrument ID	Settled amount	Settled quantity	Settlement date	Trade date	Unique Transaction Identifier (UTI)
<b>Settled</b> 28 Jun 20:27	RVP	ISIN US3453708600	43,360,000.00 USD	40000, UNIT	30 Jun 2023	28 Jun 2023	F(iciVbquqC8.SzOZ2xky)XpCNUxmTze0PcT5oE7Tj.Nnn 1mWQY
<b>Settled</b> 28 Jun 20:27	DVP				Eff. settlement date 30 Jun 2023		

Latest state on both sides: Settled

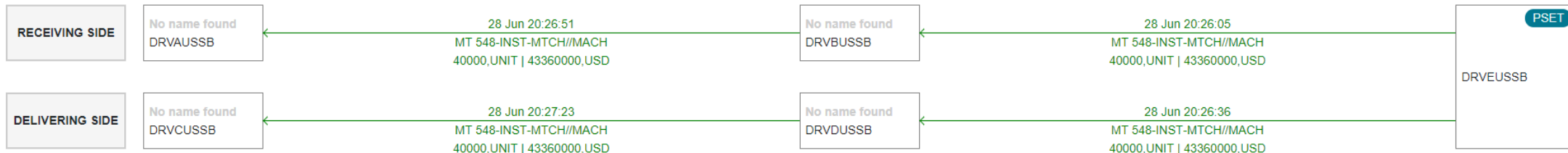
You can click on a state to see more details



Parties

State details

Detailed history and export



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Your time zone: GMT+1:00

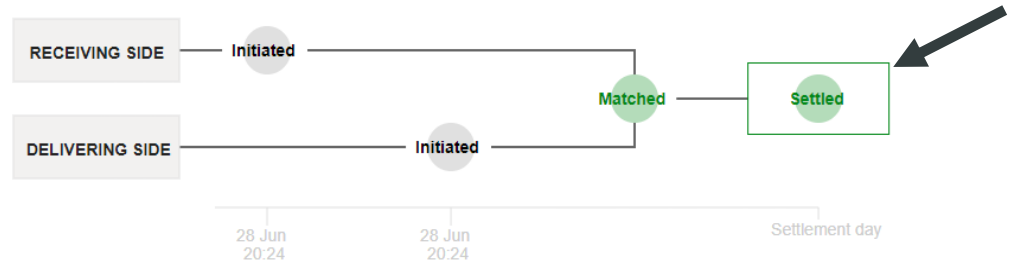
# Securities transaction view

Mark as to do [Annotate](#) [Export view](#)

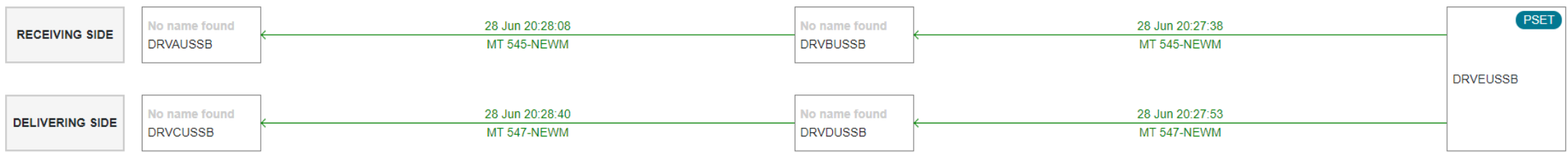
Latest transaction state	Instruction type	Financial instrument ID	Settled amount	Settled quantity	Settlement date	Trade date	Unique Transaction Identifier (UTI)
<b>Settled</b> 28 Jun 20:27	RVP	ISIN US3453708600	43,360,000.00 USD	40000, UNIT	<b>30 Jun 2023</b>	<b>28 Jun 2023</b>	F(iclVbquqC8.SzOZ2xky)XpCNUxmTze0PcT5oE7Tj.Nnn 1mWQY
<b>Settled</b> 28 Jun 20:27	DVP				Eff. settlement date <b>30 Jun 2023</b>		

Latest state on both sides: Settled

You can click on a state to see more details



Parties [State details](#) Detailed history and export



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# Securities transaction view

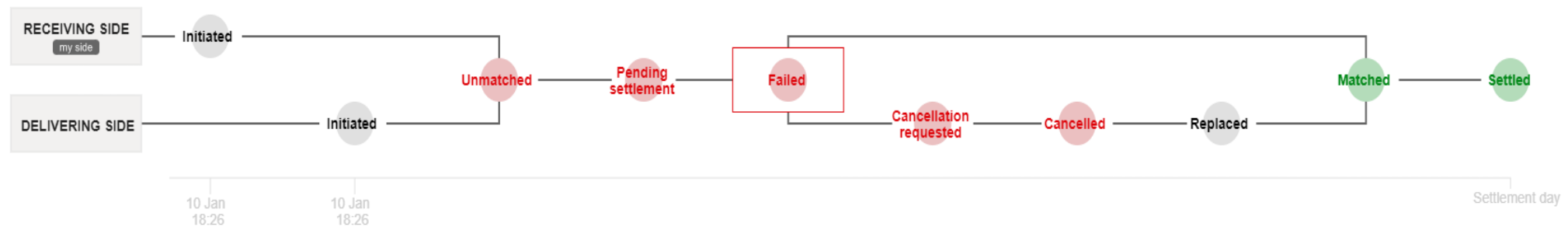
# Audit trail for a settled transaction

Mark as to do [Annotate](#) [Export view](#)

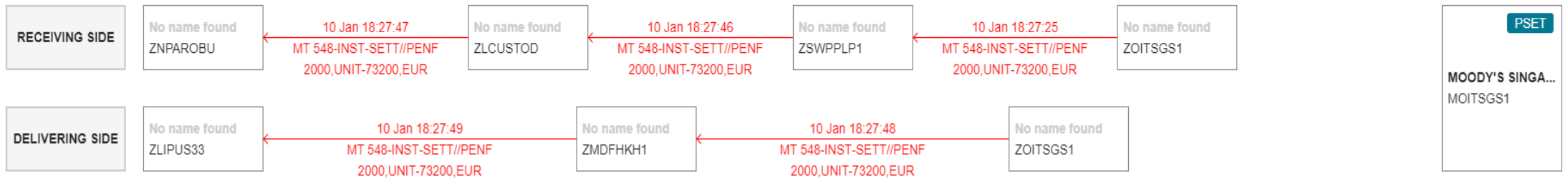
Latest transaction state	Instruction type	Financial instrument ID	Settled amount	Settled quantity	Settlement date	Trade date	Unique Transaction Identifier (UTI)
<b>Settled</b> 10 Jan 18:29 <span>my side</span>	RF	ISIN FR0000121262	73,200.00 EUR	2000, UNIT	15 Jan 2023	10 Jan 2023	TESTSCENARIO20230110172608
<b>Settled</b> 10 Jan 18:29	DF				Eff. settlement date		

Latest state on both sides: Settled - Originated by: ZOITSGS1 on 10 Jan 2023 18:29 on my side and by: ZOITSGS1 on 10 Jan 2023 18:29 on counterparty side

You can click on a state to see more details



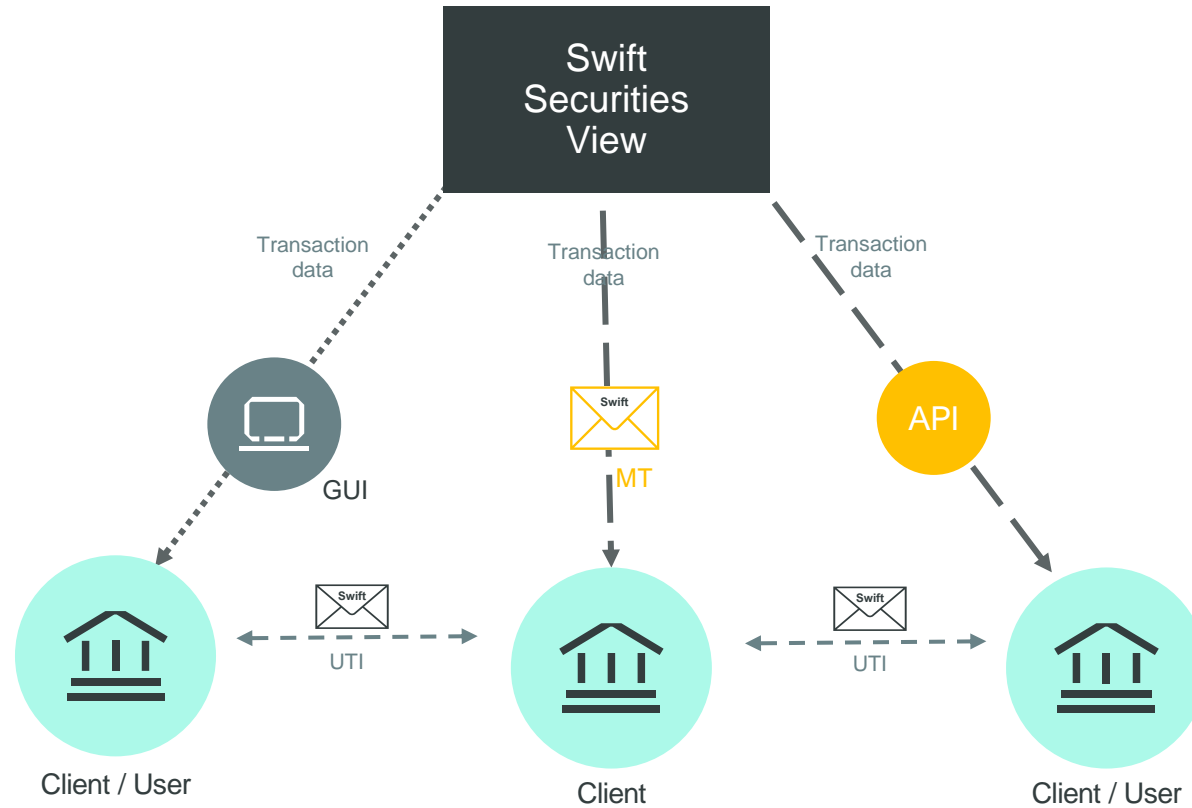
Parties [State details](#) Detailed history and export



# Service communication channels

## Integration and automation options

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## Automated Integration Channels

### Service API endpoints

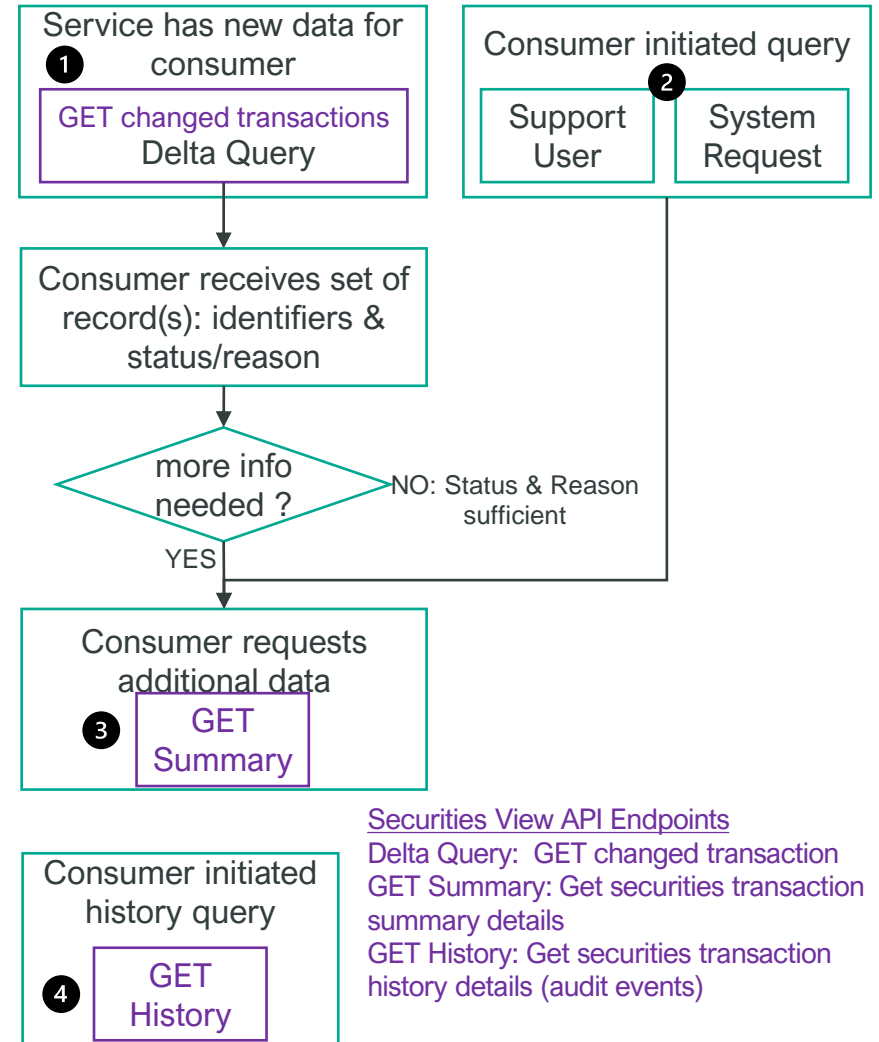
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API endpoints	Production	Purpose
<b>Get securities transaction summary details</b> 'get summary'	Live v1.0.4	A service user queries for <b>a specific record</b> . The service returns summary & current transaction details.
<b>Get securities transaction history details (audit events)</b> 'get history'	Live v1.0.4	A service user queries for <b>a specific record</b> . The service returns audit trail data for a transaction, including all instruction, status and confirmation records with corresponding timestamps and events.
<b>Get changed securities transactions (delta query)</b> 'get changes'	Dec 2023*  *target release	A service user can query for the <b>set of records</b> that have been modified (including created) since a given date and time

## Securities View API flow – sample integration logic

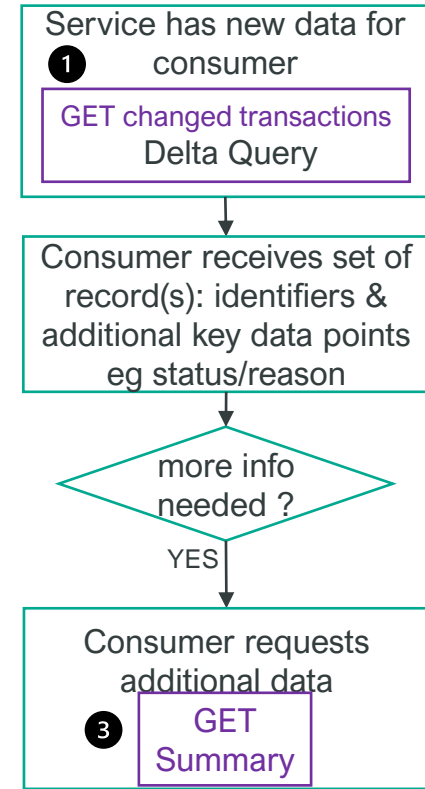
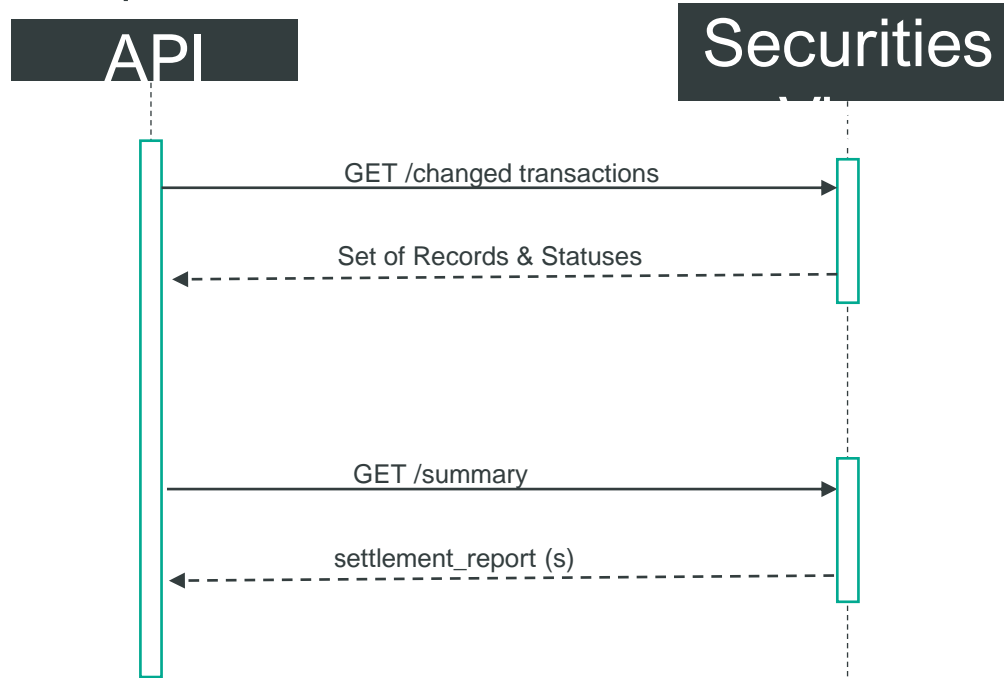
- 1 Client process to monitor for new information from the securities view service
- 2 Client also has internal triggers to request data from service:
  - A support user receives a client query and wants to check latest information
  - The clients system needs to check transaction details/status before releasing an instruction
- 3 Client uses a record reference (UTI / SEME) from to retrieve summary data from service
- 4 The history request may only be needed on demand by users for certain scenarios:
  - Investigating an interest claim
  - Client received a query



# Real – time tracking

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## The consumer polls (GETs) the service for data updates



## Transaction - Objects

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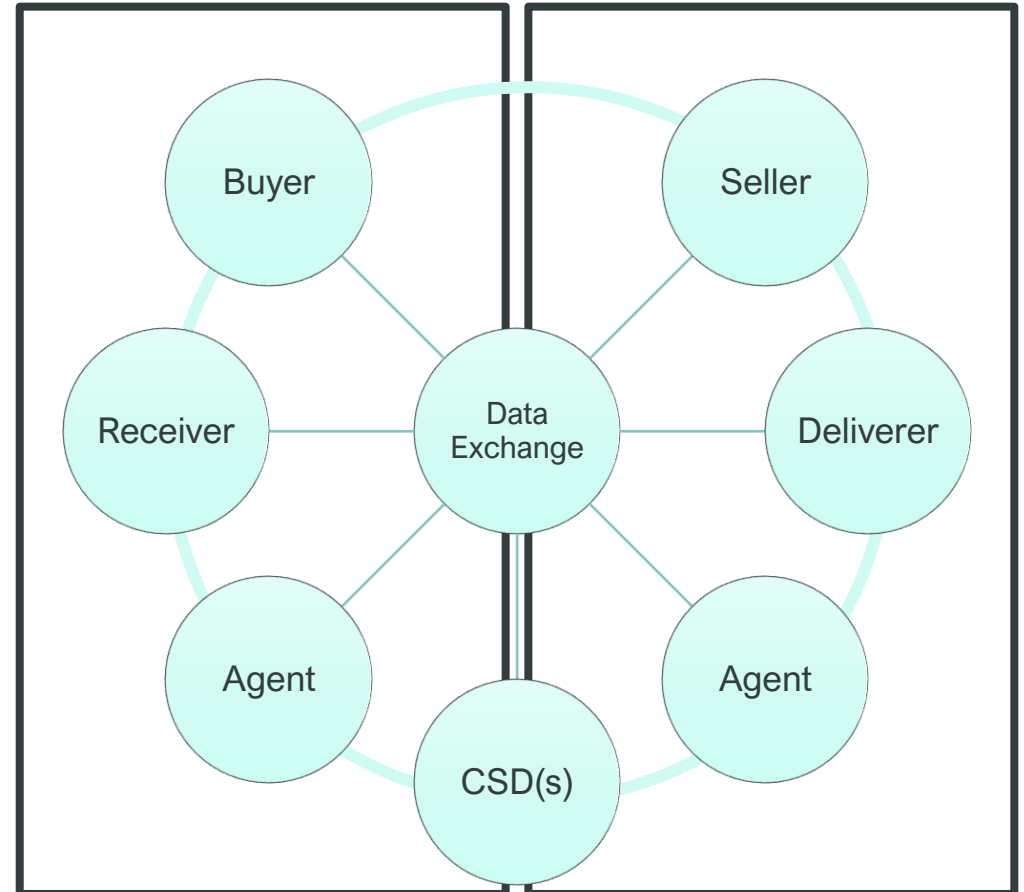
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Schema has 2 objects  
One for each side of the  
transaction

Service transaction :

MT message data consolidated via

- shared Unique Transaction Identifier (UTI) value,
- combination of sender/receiver, transaction values & references (SEME & RELA)
- data derived / enriched by the service





# Automated Integration Channels

## Transaction summary schema

September 2023

Swift Securities  
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JSToolNpp JSON Viewer

Refresh  Search

ROOT

- └ settlement\_report: [Array]
  - └ [0]: [Object]
    - └ securities\_settlement\_unique\_transaction\_identifier: "HB7FFAZI00MZ8PP8OE26BD"
      - └ settlement\_instruction: [Array]
        - └ [0]: [Object]
          - └ settlement\_type\_and\_condition: [Object]
            - └ securities\_movement\_type: "RECE"
            - └ payment: "APMT"
          - └ trade\_detail: [Object]
            - └ uti: "123400ABCDEFGHijkl1212345678901234567890123456789012"
            - └ trade\_date: [Object]
              - └ date: "2021-08-11"
            - └ settlement\_date: [Object]
              - └ date: "2021-08-16"
          - └ financial\_instrument: [Object]
            - └ financial\_instrument\_identification: [Object]
              - └ isin: "GB0987654321"
              - └ description: "Instrument Description"
            - └ settlement\_quantity: [Object]
              - └ quantity: [Object]
                - └ face\_amount: "4000000.00"
            - └ delivering\_settlement\_party: [Object]
              - └ depository: [Object]
                - └ party1: [Object]
                - └ party2: [Object]
                - └ party3: [Object]
                - └ party4: [Object]
                - └ party5: [Object]
              - └ receiving\_settlement\_party: [Object]
              - └ settlement\_amount: [Object]
                - └ amount: [Object]
                  - └ credit\_debit\_indicator: "DBIT"
              - └ settlement\_tracker\_status: [Object]
                - └ settlement\_tracker\_status: "MATCHED"
                - └ status\_issuer: "ISSUEBIC"
                - └ status\_update\_timestamp: "2022-08-18T11:55:37.736Z"

Securities Settlement Transaction Summary.json

```

1  {
2
3  "settlement_report": [{
4    "securities_settlement_unique_transaction_identifier": "HB7FFAZI00MZ8PP8OE26B
5    "settlement_instruction": [{
6      "settlement_type_and_condition": {
7        "securities_movement_type": "RECE",
8        "payment": "APMT"
9      },
10     "trade_detail": {
11       "uti": "123400ABCDEFGHijkl12123456789012345678901234567890123456789012",
12       "trade_date": {
13         "date": "2021-08-11"
14       },
15       "settlement_date": {
16         "date": "2021-08-16"
17       }
18     },
19     "financial_instrument": {
20       "financial_instrument_identification": {
21         "isin": "GB0987654321",
22         "description": "Instrument Description"
23       }
24     },
25     "settlement_quantity": {
26       "quantity": {
27         "face_amount": "4000000.00"
28       }
29     },
30     "delivering_settlement_party": {
31       "depository": {
32         "identification": {
33           "bic": "CRSTGB22"
34         }
35     }
36   }
37 }

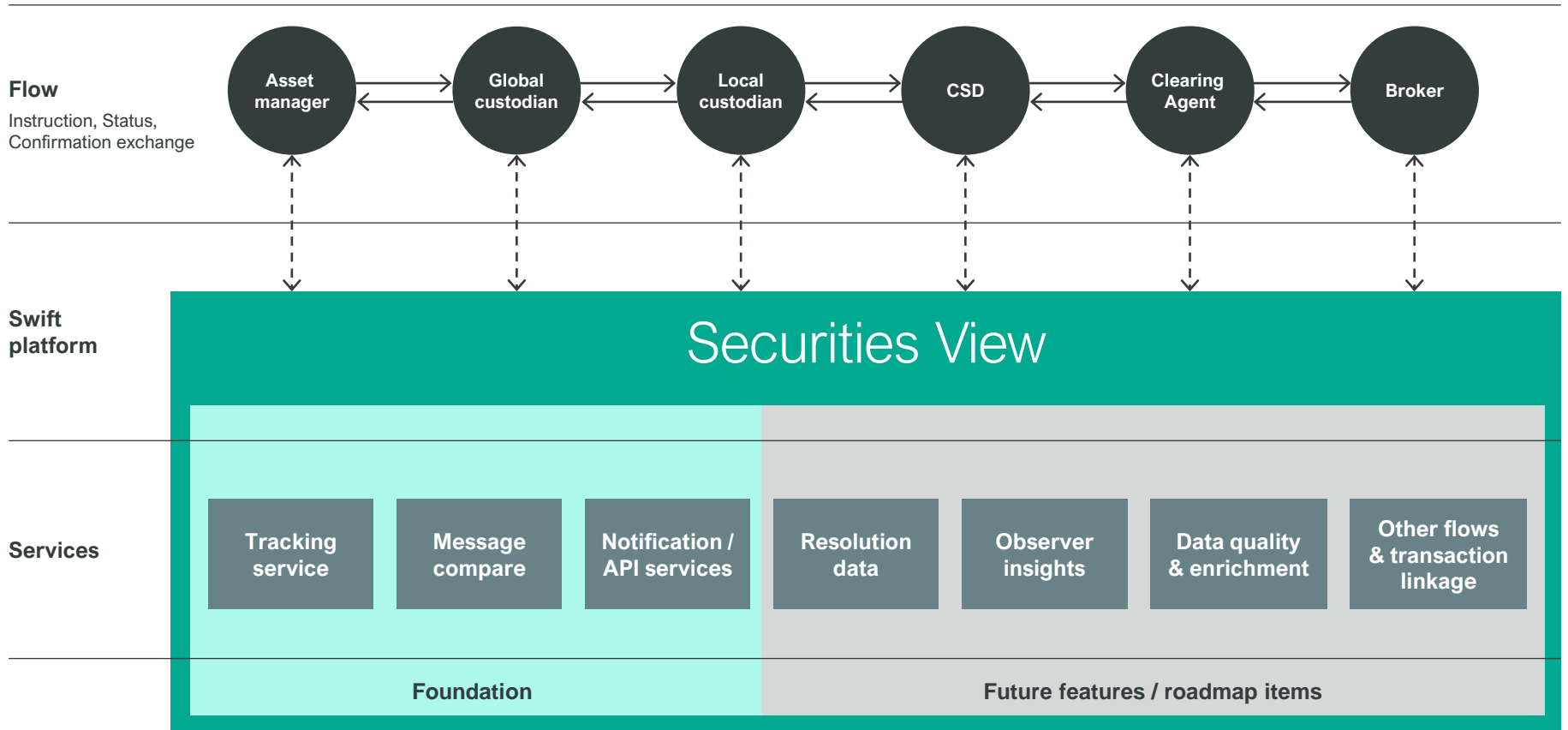
```



# Securities strategy

## Co-building Securities Service(s)

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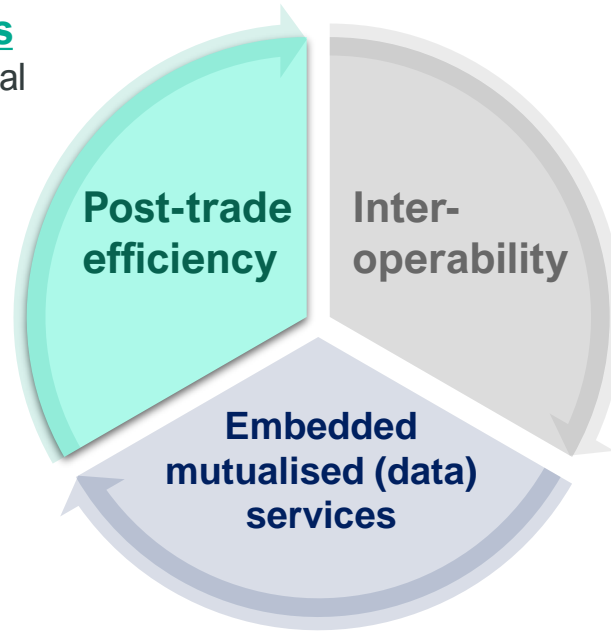


## Swift foundation and roadmap: Securities battles for today and tomorrow

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### Frictionless securities

Reduce friction and manual processes by addressing high and rising cost of exceptions, starting with settlement.



### Interoperability and interconnectedness

Facilitate interoperability between platforms across asset classes (incl. digital/tokenized) and flows (incl. payments) to remain the connector and channel of choice into all ecosystems.

### Smarter data through mutualisation and partnerships

Support business growth, cost-effective operational processes, risks management and enhanced customer experience by embedding new data-rich capabilities (incl. compliance and reference data) into securities services channels & front-end capabilities

# Platform Partner Programmes

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Global Webinar for  
Third-Party  
Providers  
/Complementors



## Platform partners

Creating and expanding Swift's platform ecosystem



Platform Partner Programmes

### **Value added services Enabler**

Embed Swift API value added services into the partner solution, e.g. Payments hub, TMS/ERP...

### **Business Connect Enabler**

Embed Swift messaging connectivity into the partner solution

### **Ancillary provider**

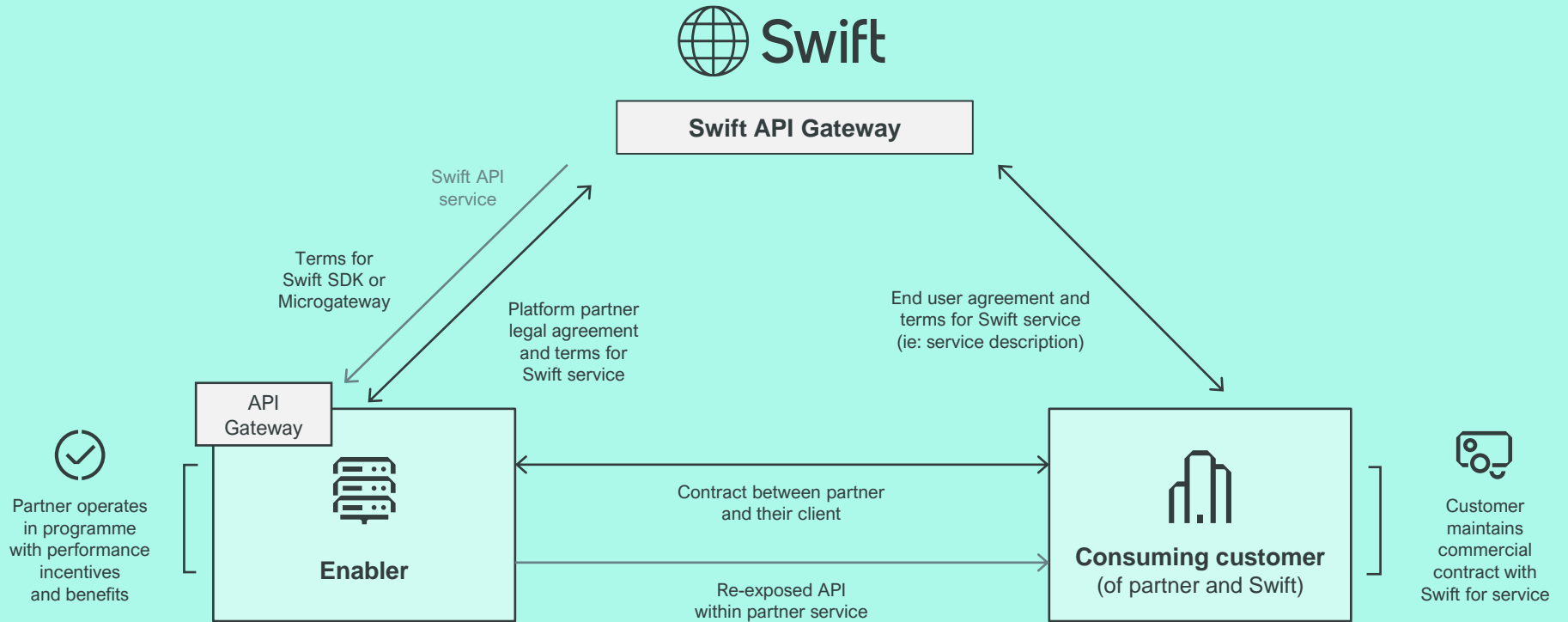
Extend the Partner API service to the global Swift community e.g. Trade document validation



**Swift**

# Value-Added Services Enabler programme

## Contractual and operational model





## Enablers programme Requirements

### Visibility

Share with Swift your solution topology/architecture and/or business application details for accreditation



### Growth

Agree on a go-to-market plan for Swift platform adoption, where achievements will lead to value-in-kind benefits and increased visibility



### Customer satisfaction & SLAs

Ensure the best quality experiences for our community



## Value-added services Enablers Benefits

### Build new product quickly

Build and monetize new products efficiently via Swift developer tools (e.g., SDK)



### Incentives

Achieve reduction on programme fees as you grow the business



### Community access

Raise awareness through community events and being featured in our Platform partner portal



### APIs & sandbox

Access to API specific documentation and tailored API resources



### Effortless customer experience

Offer a streamlined technical integration and functional support to Swift members



## Q&A and Call to Action

1. Assess current UTI support
2. Check Swift resources  
[Swift Securities View](#)  
[Swift Developer Portal | Securities View](#)  
[UTI - Market guidelines and implementation summary](#)
3. Contact your regional account manager and/or [securities@swift.com](mailto:securities@swift.com) for more information
4. For more information on the Enabler Programme please contact [james.moore@swift.com](mailto:james.moore@swift.com)

# Questions

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If you have any questions, please contact your Account Manager  
or raise a case via the **Support** page