coinbase INTERNATIONAL EXCHANGE

Multi-Portfolio Guide

Coinbase International Exchange now allows users to have multiple portfolios (previously single portfolio) for their account, which is also called “organization”. Creation and updates on portfolios, and transfers from/to portfolios can be done through both the website and the API.

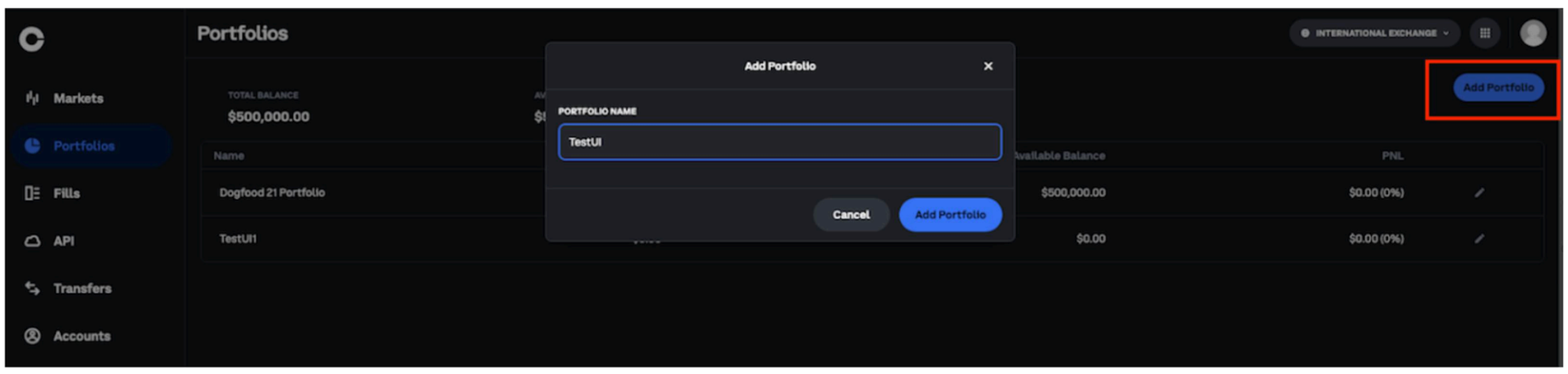
Key Details:

- Existing portfolio will be known as the “Primary Portfolio” and all API keys existing today will interact with just that portfolio
- Max number of portfolios: **20**
- API keys can be created to work with **one or more** portfolios
  - Portfolio(s) will be selected during the API key creation process on the direct access UI
- Transfers APIs (recently released) will work across all portfolios

Creating/Updating a Portfolio

How to create or update a portfolio on the website

1. View all current portfolios from the ‘Portfolios’ tab
2. To add a new portfolio, click ‘Add Portfolio’ and give it a distinct name



3. After creating a new portfolio, you will be able to select it when creating a new API key.

   Note: *For all new Portfolios, you will need to create a new API key*

How to create or update a portfolio using the API

- Creating a Portfolio: POST /api/v1/portfolios
  - {‘name’: ‘new portfolio name’}
- Updating a Portfolio: PUT /api/v1/portfolios/{portfolio_id}
  - {‘name’: ‘new portfolio name’}

Questions? Contact: intx.enquiries@coinbase.com

API Changes

Changes on FIX

Please get the latest FIX xml dictionaries and latest FIX API documentation

- When using an API key that has rights to multiple portfolios New Order Single (35=D) and Order Cancel (35=G) requests require you to specify the portfolio that you are targeting in the parties repeating group
  - Tag 448 Party ID = Portfolio UUID
  - Tag 452 Party Role = 24
- Execution Reports and Rejects will also contain the party repeating group (Order Entry and Drop Copy)

Changes on REST

Please review the latest reference docs for REST

- New Create, Update and GET APIs for Portfolios
- All Existing /v1/portfolios endpoints are updated to include a /v1/portfolios/{portfolio_id} option for portfolio specification.
  - Ex /v1/portfolios/{portfolio_id}/fills
- Order create & cancel API calls now require “Portfolio” field in the request body

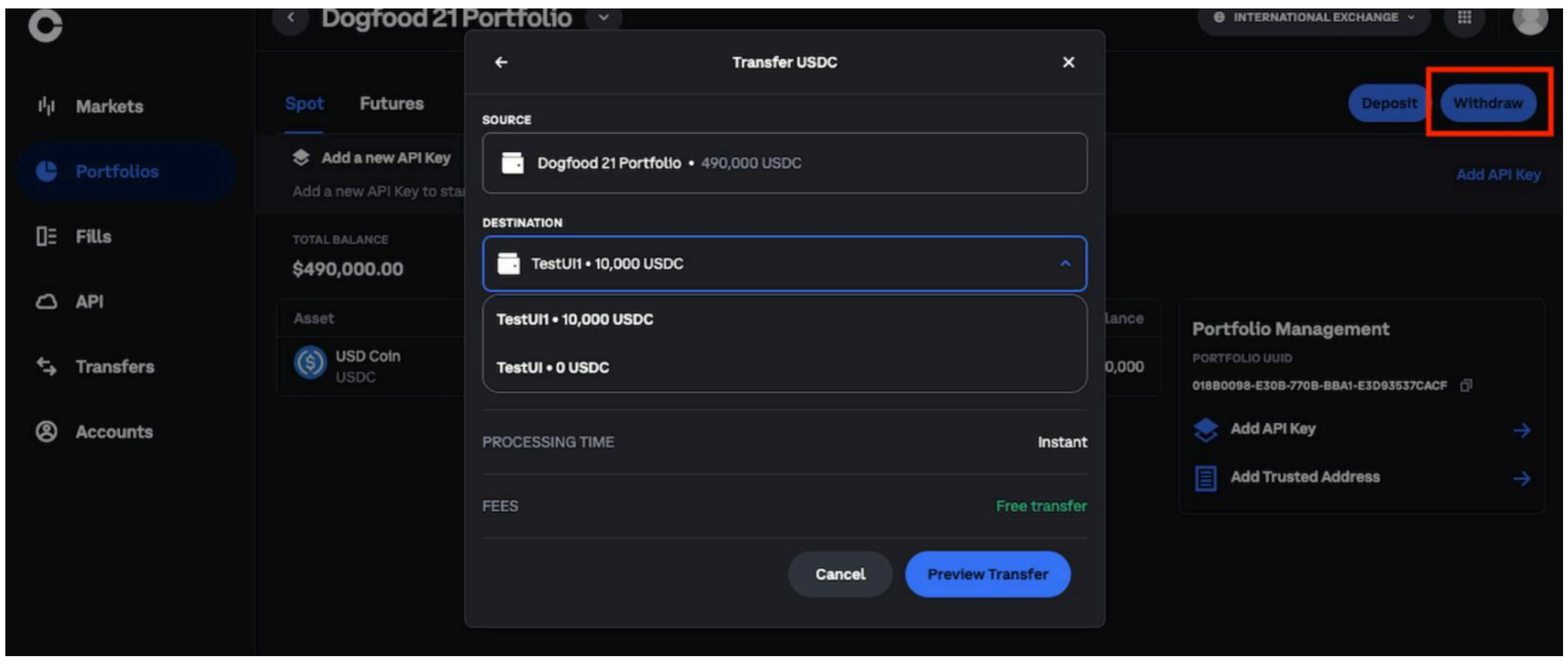
Transferring Funds

Transferring funds is available through the website and REST API for:

- Transferring funds from/to a portfolio to/from an external wallet
- Transferring funds from a portfolio to another portfolio within the same organization

How to transfer funds on the direct access UI?

1. Select the Portfolio you want to transfer funds out of and select “Withdraw”
2. Select your available portfolio using the drop down selector
3. Transfers should be instantly reflected



Note: Position transfers between portfolios are currently NOT supported

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