

PUBLICATIONS

The New ISDA Protocol: What Investment Managers Need to Know

June 2013

Investment funds (or investment managers on their behalf) may now adhere to the ISDA March 2013 DF Protocol Agreement (Protocol 2.0). Protocol 2.0, as with the ISDA August 2012 DF Protocol, is an efficient means for swap dealers to comply with certain new Commodity Futures Trading Commission (CFTC) rules applicable to bilaterally negotiated swap transactions. Adherence to the Protocol 2.0 is in addition to, and not in lieu of, adhering to the August Protocol. Protocol 2.0 provides a mechanism for compliance with three separate CFTC rules. In this article, SRZ partner Craig Stein and former SRZ attorney Kristin Boggiano discuss the CFTC rule regarding trading documentation and reconciling trade data.

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