



# Information for Education Policy





## Terminology

### Capitalized terms

**MDP** = Market Data Policies

**IMDP** = Indices Market Data Policies

**IDA** = Indices Data Agreement

**JDA** = JSE Data Agreement

**PSF** = Products and Services Form

**EOD** = End of Day





## Information for Education Policy

- Introduction, definition and application
- Conditions
- Regular access & Ad-hoc requests





## Introduction, definition and application





## Introduction, definition and application

“Educational Institution” means schools, universities, colleges and students thereof.





## Introduction, definition and application

Educational Institutions may, subject to the terms of this policy, submit a written request to the JSE for access to data for no consideration.





## Introduction, definition and application

The request must be submitted to the market data team via [mdclients@jse.co.za](mailto:mdclients@jse.co.za).





## Conditions





## Conditions

This policy applies only to delayed data, end of day data and historical data – live data is excluded.

The educational institution may only use the data provided in terms of this policy to support educational activities and may not use any data, directly or indirectly, for any other purpose whatsoever.

Unless otherwise stated in this policy, the customer is not responsible for any obligations of the educational institution.





## Conditions

The educational institution must provide the JSE with details of:

- a. The data required.
- b. The intended use of the data.
- c. How often it will receive the data.
- d. How the data is intended to be made available (e.g. through a terminal device at the educational institution, or through web based access).
- e. Such other details as the JSE may reasonably request.





## Regular access vs ad-hoc request - Examples





## Regular access vs ad-hoc request - Examples

An educational institution offering financial courses would like to expose its students to the volatility in the financial markets and would therefore like access to data on an ongoing basis.





## Regular access vs ad-hoc request - Examples

A student is doing a study on the impact of the weather on the risk appetite of commodity investors and needs data for a specific period to correlate against weather patterns. They would make a once off request for historic data.





## Request for Regular Access





## Request for Regular Access

The JSE will not provide data on a continuous basis directly to an educational institution. This type of data provision must be obtained from a customer (an example would include a market data vendor).





## Request for Regular Access

The educational institution will, prior to being allowed to use the data, be required to sign an education IP dispensation letter provided by the JSE that will govern inter alia the use of the data.





## Request for Regular Access

A customer must ensure that the conditions of this policy are complied with and must, before providing any data to an educational institution or student thereof, receive confirmation from the JSE that both the JSE and the educational institution have signed the educational institution dispensation Letter.





## Request For Ad-Hoc Access





## Request For Ad-Hoc Access

The student must provide reasonable proof that they are a current and legitimate student with an educational institution.





## Request For Ad-Hoc Access

The JSE may request access to the student's research/thesis paper upon completion, which may be used for the benefit of the JSE and/or JSE employees.





## Request For Ad-Hoc Access

Where required by the JSE, the student must sign a student dispensation letter directly with the JSE that will oblige the student to provide the research/thesis paper to the JSE, upon completion, for use by the JSE.





## Request For Ad-Hoc Access

The student dispensation letter requires the student to ensure that, to the extent allowed by law, the JSE is absolved of any liability arising from its access and reference to the data.





## Request For Ad-Hoc Access

If the cost and/or effort is too high for the JSE to provide the data at no consideration, the JSE will provide the student with a quote for the provision of the relevant data or direct the student to a customer that has access to such data to request such customer to provide such data to the student in accordance with this policy.





## Request For Ad-Hoc Access

Where a customer provides the data to a student, it must ensure that the conditions of this policy are complied with and must, before providing any data to any student, receive written confirmation from the JSE that both the JSE and the student have signed the student dispensation letter.





Thank you



JSE

MDClients@jse.co.za