CSIMarket

Master Service Level Agreement

Common SLA and Product Schedule

Data distribution is managed by:
CSI MARKET FD
Ražanj 188, 22203 Rogoznica, Croatia, Europe

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Part A: Common SLA

1. Scope and structure

1.1 This Service Level Agreement ("SLA") applies to every paid CSIMarket subscription. It sets the common rules. Each subscription's numbers (availability target, support response times, service credits, limits) are set in that subscription's **Addendum**, so the common terms stay the same across plans.

1.2 Data distribution is managed by:

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1.3 The SLA package has four parts:

Part	What it covers	Where it lives
Common SLA (Part A)	Definitions, measurement, maintenance, data freshness, support process, security, credits, responsibilities, confidentiality	This document
Subscription Addendum	The service levels and limits for one plan: Individual, Professional, Enterprise, or a custom licence	Separate addendum file per plan (A Individual, B Professional, C Enterprise, D Custom licence) · api.csimarket.com
Product Schedule	Links to the live product and plan pages that define datasets, endpoints and entitlements	csimarket.com/products · Schedule 1 of this document
Terms of Use	Licence terms, OEM / white-label / embedded licensing, AI licensing, liability, governing law	Terms of Use · OEM licensing · AI licensing

1.4 **Order of precedence** (highest first): (1) a signed order form or custom agreement; (2) the Subscription Addendum; (3) this Common SLA; (4) the Terms of Use. For service levels, this SLA replaces the Terms of Use's "as available" wording to the extent the Addendum commits to a level.

1.5 **Products and entitlements.** Datasets, endpoints and fields are described on the live product pages linked in the Product Schedule. The subscriber's dashboard and entitlement endpoint (`csimarket_my_access` on MCP) identify the features currently enabled for their subscription.

1.6 CSIMarket may add datasets, endpoints, fields and features without requiring an SLA amendment. Material reductions or removals of paid entitlements are subject to the applicable Subscription Addendum, signed agreement and notice provisions. Custom or expressly contracted entitlements may only be changed in accordance with the applicable agreement.

2. Definitions

2.1 In this SLA the following terms have these meanings:

Term	Meaning
Service	The CSIMarket REST API (`api.csimarket.com`), MCP server and subscriber web access covered by the subscription
Production Endpoint	A generally available API endpoint or MCP tool listed for the subscriber's plan. Beta, preview or "New"-labelled features are excluded until generally available.
Availability	The share of minutes in a calendar month in which the Service is Up, excluding Excluded Minutes
Up	The status endpoint returns healthy, a valid, in-scope request to a Production Endpoint returns a non-5xx response, and an MCP tool call returns data

Term	Meaning
Excluded Minutes	Minutes affected by the exclusions in clause 3.3
Business Day	Monday to Friday, excluding Croatian public holidays
Business Hours	09:00 to 17:00 Central European Time on Business Days
Incident	An unplanned interruption or degradation of the Service, or a material data error
Severity	The priority given to an Incident under clause 6.2
Data Freshness	Time from a filing's SEC EDGAR acceptance timestamp to the moment its data is available through the API and MCP, measured as set out in clause 5.2
Service Credit	A credit against future subscription fees, as set in the Addendum

3. Availability

3.1 **Commitment.** CSIMarket will meet the monthly Availability target stated in the subscriber's Addendum. Where the Addendum states no target, CSIMarket uses reasonable efforts to keep the Service available.

3.2 **Measurement.**

(a) Availability = (total minutes in the month − Excluded Minutes − minutes not Up) ÷ (total minutes in the month − Excluded Minutes).

(b) CSIMarket monitors the MCP `/health` and `/version` endpoints plus a representative production API request and an MCP tool execution that returns data, at least every 5 minutes. The Service is Up only if all three checks succeed. A failed check counts the minutes until the next successful check.

(c) CSIMarket's monitoring records are the reference. A subscriber may submit its own logs with a credit claim, and both are considered.

3.3 **Exclusions.** The following do not count against Availability:

(a) scheduled maintenance announced under clause 4;

(b) requests rejected because the subscriber exceeded its rate or export limits (HTTP 429), lacks the scope (403), or sent invalid or unsigned requests (4xx);

(c) suspension for non-payment, credential misuse or breach of the Terms of Use;

(d) outages of SEC EDGAR or other upstream public sources (the Service stays Up; only Data Freshness is affected);

(e) failures of the subscriber's network, systems, AI client or model provider;

(f) beta or preview features, and the website's public (non-subscriber) pages;

(g) force majeure: events beyond CSIMarket's reasonable control that reasonable precautions could not have prevented, such as natural disasters, war, government action or failures of the public internet backbone. Outages of CSIMarket's hosting provider (OVH) count as downtime unless they are themselves caused by such an event;

(h) emergency security actions to protect the Service or its users, limited to the time needed.

4. Maintenance and change notice

4.1 **Scheduled maintenance** is announced at least the notice period stated in the Addendum, by email and on the status endpoint, and scheduled outside US market hours (09:30 to 16:00 New York time) where possible. Monthly maintenance is capped at the limit in the Addendum; minutes above the cap count as downtime.

4.2 **Emergency maintenance** may happen without notice to fix a security issue or prevent data corruption. CSIMarket notifies affected subscribers as soon as practicable.

4.3 **Breaking API changes.** CSIMarket gives at least 90 days' notice before a breaking change to, or removal of, a Production Endpoint, MCP tool or field on paid plans. Versioned paths (`/api/v1/…`) stay available during the notice period.

4.4 **Non-breaking changes.** New endpoints, tools, fields and datasets may be added without notice and appear on the product pages in the Product Schedule.

4.5 **Methodology changes** are published as a new methodology version with its date, available from the methodology endpoint.

5. Data freshness and corrections

5.1 **Freshness.**

(a) New SEC filings are processed on a rolling basis. The Data Freshness target is stated in the Addendum.

(b) Industry and sector aggregates are recalculated daily after the US market close.

(c) Each dataset's update cadence and time model (point-in-time, restated history, snapshot, event) is published in its dataset metadata (`/api/datasets/{id}`). That metadata, not this SLA, defines what a dataset contains.

(d) An SEC EDGAR outage pauses ingestion. Freshness is measured from when EDGAR makes the filing available again.

5.2 **How Data Freshness is measured.** Each filing passes four timestamps. Only the time between T1 and T4 counts against the Data Freshness target.

Timestamp	Meaning	Source
T1 SEC acceptance	The acceptance date-time on the filing in SEC EDGAR	EDGAR filing index
T2 Available to CSIMarket	When EDGAR makes the filing retrievable through its public feeds	CSIMarket ingestion log
T3 Processing complete	When CSIMarket has parsed, validated and loaded the filing	CSIMarket ingestion log
T4 Available to subscribers	When the filing's data is returned by the API and MCP	CSIMarket ingestion log

(a) If T2 is later than T1 because of an EDGAR delay or outage, the delay (T2 − T1) is excluded.

(b) Point-in-time records carry the SEC acceptance time (T1) as their knowledge time, so a delay in processing never changes what a point-in-time query returns for a past date.

(c) Filings that fail validation and are held for review are reported in the dataset metadata and count as late until released.

5.3 **Data accuracy.** Data is extracted and computed from public filings and may contain errors. CSIMarket does not warrant that the data is error-free; the accuracy disclaimer in the Terms of Use applies. Quality fields (completeness score, source quality flag, restatement flag) are published per record so subscribers can filter.

5.4 **Corrections.**

(a) Report a suspected data error to data.info@csimarket.com with the company, field, period and the filing it contradicts.

(b) CSIMarket acknowledges the report within the time stated in the Addendum and checks it against the source filing.

(c) Confirmed errors are corrected in the next processing cycle. In the Point-in-Time dataset the earlier value is kept as a prior version, so corrections never erase history.

(d) CSIMarket tells the reporter the outcome.

6. Support and incident handling

6.1 Channels.

Purpose	Channel
Technical faults and incidents	support@csimarket.com, or a tracked ticket from the dashboard support form
Data errors	data.info@csimarket.com
Plans, billing, quotes	sales@csimarket.com
Licensing, redistribution, AI rights, DPAs	data.info@csimarket.com
Privacy requests	privacy@csimarket.com
Legal notices	data.info@csimarket.com

Support is in English, in writing. Response times apply in Business Hours unless the Addendum says otherwise.

6.2 Severity levels.

Severity	Definition	Examples
S1 Critical	Service unavailable, or all requests failing, for the subscriber	API or MCP returns 5xx for every request; sign-in impossible
S2 Major	A Production Endpoint, MCP tool or dataset is failing or stale beyond its freshness target, with no workaround	One dataset not updated for 48 hours; bulk export jobs failing
S3 Minor	Partial degradation with a workaround, or a single-company data error	Slow responses; wrong value for one filing
S4 Request	Question, documentation issue or feature request	How to use an endpoint

The subscriber proposes the severity when reporting; CSIMarket may reclassify it with a reason.

6.3 Response and resolution.

(a) First response means a human acknowledgement with an initial assessment, within the time in the Addendum.

(b) Updates follow the cadence in the Addendum until the Incident is resolved or downgraded.

(c) Resolution means the Service is restored or a workaround is in place. Root-cause fixes may follow later.

(d) For S1 Incidents affecting all subscribers, CSIMarket notifies subscribers by email and publishes status on the status endpoint.

6.4 Incident report. For any S1 Incident, Enterprise subscribers receive a written summary within 5 Business Days: timeline, cause, impact and actions taken.

7. Security and data protection

7.1 These commitments restate the controls in the Privacy Policy and Licensing page. CSIMarket's controls are aligned with ISO/IEC 27001 principles and its operational resilience framework is DORA-aligned; CSIMarket holds no certification.

7.2 **Hosting:** servers and databases hosted by OVH in Canada.

7.3 **Encryption in transit:** TLS on all Service endpoints.

7.4 **Credentials:** API keys stored as SHA-256 hashes; MCP tokens stored hashed; secrets redacted from logs. MCP access tokens expire after 30 minutes and refresh tokens after 90 days.

7.5 **Access control:** licence status and scopes checked on every request; rate and export limits enforced automatically; HMAC request signing and IP whitelisting where the Addendum provides them.

7.6 **Logs:** retention follows section 9 of the Privacy Policy: API and MCP request logs are kept at most 12 months and authentication logs 12 months, then deleted by an automatic daily job. CSIMarket does not collect AI prompts or conversation history.

7.7 **Personal data breach:** CSIMarket notifies the supervisory authority within 72 hours where GDPR Art. 33 requires, and notifies affected subscribers without undue delay after confirming a breach that affects their account or credentials.

7.8 **Data processing agreement:** available on request where CSIMarket processes personal data on behalf of a subscriber and a DPA is legally required. The DPA forms part of the applicable contractual documentation.

7.9 **Sub-processors and transfers:** as listed in the Privacy Policy.

8. Service credits

8.1 **Eligibility:** only where the Addendum provides credits and the subscriber's account was in good standing during the month.

8.2 **Amount:** a percentage of that month's subscription fee, as set in the Addendum. For annual subscriptions, the monthly fee is the annual fee divided by 12.

8.3 **Claim:** email support@csimarket.com within 30 days after the end of the affected month, with the dates, times and affected requests.

8.4 **Form:** applied as a credit to the next invoice or renewal. Credits are not paid in cash and expire if the subscription ends without renewal.

8.5 **Cap:** total credits in a month cannot exceed the cap in the Addendum.

8.6 **Monthly reset:** Service Credits are calculated separately for each calendar month. Availability, credit entitlement and the cap reset at the start of each month, and shortfalls or unused cap do not carry over to later months.

8.7 **Sole remedy:** Service Credits are the subscriber's sole and exclusive remedy for failure to meet a service level, except for: (a) the termination right for repeated failure in the Addendum; (b) remedies for breach of the security, data-protection or confidentiality obligations; and (c) any liability that cannot be limited or excluded under applicable law.

9. Responsibilities, suspension and law

9.1 **Subscriber responsibilities.** The subscriber will:

(a) keep API keys, MCP sign-ins and passwords confidential, and out of client-side code and public repositories;

(b) report lost or misused credentials promptly ("rotate first, report second");

(c) use the Service within the plan's scopes, locations and rate and export limits;

(d) not probe, scan or test the Service for vulnerabilities;

(e) follow the applicable licence terms, including restrictions on redistribution, sublicensing and exposure of CSIMarket data to third-party AI systems. Additional rights for OEM, white-label, embedded distribution and AI applications require a separate written licence or agreement where applicable (OEM licensing, AI licensing). Such separately granted rights prevail over conflicting default-use restrictions.

9.2 Suspension and termination.

(a) Access stops immediately if the subscription lapses or payment fails.

(b) CSIMarket may suspend or terminate for credential misuse, unauthorised redistribution or material breach, with notice and a chance to remedy where practicable.

(c) On termination the licence ends: the subscriber must stop using the data and destroy copies. Derived outputs that cannot be used to recover CSIMarket data may be kept.

9.3 Liability and law.

(a) Liability is limited as set out in the Terms of Use, capped at the fees paid in the 12 months before the event.

(b) Croatian law applies, including applicable EU law; the competent courts of the Republic of Croatia have jurisdiction.

(c) CSIMarket may update this SLA by posting a new version with an effective date. A change that reduces a committed service level applies to an existing subscription only from its next renewal.

10. Confidentiality

10.1 **Confidential Information** means non-public information one party discloses to the other in connection with the Service, including: the subscriber's account information, API credentials and MCP sign-ins; the commercial terms of the subscription; customer-specific usage information; and CSIMarket's non-public technical information, such as security documentation and incident reports.

10.2 Each party will use the other's Confidential Information only to perform or receive the Service, protect it with at least reasonable care, and disclose it only to employees, contractors and advisers who need it and are bound by equivalent obligations.

10.3 These obligations do not apply to information that is or becomes public through no fault of the receiving party, was already lawfully known to it, is independently developed, or must be disclosed by law or a competent authority (with prompt notice to the other party where lawful).

10.4 CSIMarket will not disclose a subscriber's identity, usage or commercial terms to third parties, except to sub-processors as described in the Privacy Policy or with the subscriber's consent.

10.5 These obligations survive termination for three years, and indefinitely for credentials and security information.

Schedule 1: Product Schedule

This schedule links to the live pages that define each product, plan and licence. The pages change as products evolve; the version in force for a subscriber is the page as it stands on the date in question. The schedule only changes when a product is added or removed.

Products

Product	Product page	Dataset metadata (API)
Point-in-Time Fundamentals	point-in-time-fundamentals	`/api/datasets/point_in_time_fundamentals`
Industry Benchmarking Dataset	industry-benchmarking-dataset	`/api/datasets/industries`, `/api/datasets/sectors`
Quantitative Factor & Risk Dataset	quantitative-factor-risk-dataset	`/api/datasets/quant_factors`
Supply-Chain & Relationship Intelligence	supply-chain-relationships-dataset	`/api/datasets/relationships`
Company Fundamentals Dataset	company-fundamentals-dataset	`/api/datasets/company_fundamentals` and the three statement datasets
Institutional Ownership Dataset	company-ownership-dataset	`/api/datasets/institutional_ownership`, `/api/datasets/insider_transactions`
Total Market Dataset	total-market-dataset	
Screening & Bulk Dataset	screening-bulk-dataset	
Share Prices & Market Performance	share-prices-market-performance	
Business Segments & Geographic Exposure	business-segments-geographic-dataset	`/api/datasets/business_segments`
News & Corporate Events	news-events-dataset	
AI Training & RAG Datasets	ai-training-datasets	

All products: csimarket.com/products. Product page links are under csimarket.com/products/. Dataset metadata paths are relative to `https://api.csimarket.com`.

Plans, pricing and licences

Page	Defines
Pricing	Plan prices, rate limits, endpoint counts, bulk access
Subscription plans	Licence types and trial
Licensing	Who may use each plan, permitted use, OEM, marketplace, referral
AI licensing	AI training, embedding and RAG licences
Full API Access	API and MCP overview
Terms of Use	Liability, governing law, termination
Privacy Policy	Personal data, sub-processors, retention, DPA
Customer support	Support channels

What a subscriber has right now

The entitlement endpoint (`csimarket_my_access` on MCP, and the subscriber dashboard) returns the plan, status, expiry, included and excluded datasets, and the live rate-limit counter. Where a product page and the entitlement differ, the subscriber should report it to support@csimarket.com.