



APMI MEMBERSHIP

Enabling Long-Term Value Creation for the PMS Industry

Since its inception in May 2022, **APMI** has emerged as a key industry institution, driving standardization, strengthening compliance frameworks, and enabling collaborative growth across the PMS ecosystem, with strong support from the Board, Regulator, and APMI Members.

FINANCIAL YEAR 2026-2027

Advancing transparency, standardization, and trust in portfolio management through industry collaboration and regulatory alignment.



Why APMI Membership Matters

APMI Membership goes beyond access, it enables active participation in shaping the future of the PMS industry. Members benefit from:

- **Direct engagement** with the regulator
- Participation in **industry-level decision-making**
- Access to shared **infrastructure and cost efficiencies**
- Access to **data, insights, and regulatory developments**



APMI Empowering Member Advancement













Over the past four years, APMI has actively contributed to strengthening the PMS industry by focusing on compliance, governance, reporting standards, and industry-wide collaboration. Here's a summary of **why every PMS player must be part of APMI**:

A) Governance & Representation









Particulars	APMI Members	Non-Members
Voting Rights – Participate in electing the APMI Board of Directors	✓	✗
Nomination Eligibility – Eligibility for nomination to the APMI Board (as per rotation policy)	✓	✗
Participation in APMI Working Committees – Contribute to policy-making and best practices for PMS Industry	✓	✗
Participation in meetings with SEBI – Table Top exercises, Round Table conferences and Training sessions	✓	✗

B) Compliance & Regulatory Support









Particulars	APMI Members	Non-Members
Access to Compliance Sutra – With a facility to download the Compliance Sutra presentation under Member login	✓	✗
Access to Compliance Calendar – Stay updated on event-based & regular compliances required by Portfolio Managers	✓	✗
Access to Standardised CSCRF Policies	✓	✗
Invitation to attend Knowledge Sessions on PARAS Portal to reduce regulatory alerts	✓	✗





Particulars	APMI Members	Non-Members
Access to the Facilitation Framework towards compliance of SEBI Digital Accessibility Circular with special pricing		
Access to observation list generated by SEBI as part of their PMS Audits and Inspections		
Invitation to participate in Training Sessions conducted by NISM		
Access to APMI AML Services which is a centralized support framework designed to help APMI Members to meet AML compliances		
Access to download the Annual Declaration of Self Certification of APRN Holders – Distributors registered with APMI		
Avail special pricing from BSE MSOC – BluSapphire for MSOC & VAPT		

C) Data, Insights & Tools

Particulars	APMI Members	Non-Members
Member Desk Dashboard – With a facility to download AUM Movement, Performance & IA Charts		
Access to consolidated industry reports (Performance, Turnover, IA)		
Access to a centralized Query Management Module with real-time tracking and faster resolution timelines		
Access to PMS Distributor data , including EUIN details , APRN cancellation reports, and renewal-pending reports		

D) Community & Engagement

Particulars	APMI Members	Non-Members
Access to APMI WhatsApp Group & PMS Community – Get instant updates and industry interactions		
Invitation to participate in Annual PMS Conclave		
Participation in APMI Compendium under ' Member Voices ' section		
Participation in #IndustrySpeaks captured during our various events		

Particulars	APMI Members	Non-Members
Participation in the APMI Cricket Team		
Invitation to participate in PMS Manthan		



Upcoming Initiatives – Exclusive to APMI Members

APMI VISTA (Visual Industry Statistics & Trend Analytics)

A next-generation data intelligence platform enabling insight-led decision-making.

APMI - SRF (Single Registration Framework)

A unified registration framework to reduce duplication, improve onboarding efficiency, and enhance standardization.

APMI CBP (Capacity Building Program)

A structured capacity-building program designed to develop a future-ready talent pipeline for the PMS Industry.



Enabling Scale, Standardization, and Sustainable Growth in the PMS Ecosystem

With continued support and feedback from our Members and Working Committee participants, APMI is committed to launching more such initiatives. Some of the capital-intensive projects undertaken in the past four years include:

- Development of **APMI Website** with capacity for **Performance Data** upload by the PMS Industry
- Enhancing the **Member Registration** portal
- Building a user-friendly **Distributor Registration Portal**
- Industry-wide **query handling & grievance** redressal support
- Development of **APMI Insights portal** - An access point for industry data, analytics and actionable insights
- Launch of **APMI PMS Industry Compendium**
- Developing infrastructure for managing **SCORES**
- Developing infrastructure for managing **PARAS**
- Undertaken a **Global Benchmarking Study** on PMS across mature markets



Industry Engagement & Events

With continued support from our members and stakeholders, APMI organizes events that bring together key participants to foster collaboration, meaningful dialogue, and stronger industry linkages. Notable events include:

- Annual **APMI Meet**
- Celebration of '**3 Years of APMI**'
- **Regional Meets** - APMI conferences in Delhi, Bangalore, Ahmedabad, and more to come
- **APMI Office** Inauguration
- Annual **PMS Conclave**
- **PMS Manthan**

APMI is evolving into a more **robust and future-ready industry institution** - leveraging digital platforms, data intelligence, and collaborative frameworks to enhance transparency, streamline compliance and enable sustainable growth across the PMS sector.

Your participation as an APMI Member is integral to shaping a stronger, more transparent, and globally competitive PMS industry.

[Access the detailed Membership Fee Structure for FY 2026–27 here](#)

We encourage you to continue your association with APMI and renew your Membership for FY 2026-27 to fully leverage these benefits. For any queries, please reach out to us at apmi@apmiindia.org.

*Warm Regards,
Association of Portfolio Managers in India*

Let's build the future together.

Get in touch

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<https://www.apmiindia.org/apmi/welcome.htm>