



membership . <membership@apmiindia.org>

APMI Compliance Sutra Calendar- March'26

1 message

APMI India <apmi@apmiindia.org>
To: APMI India <apmi@apmiindia.org>
Bcc: membership@apmiindia.org

Fri, Mar 20, 2026 at 11:53 AM

To: The Compliance Officers & Principal Officers of APMI Members.

Greetings from APMI!

Dear All,

We deeply appreciate your continued support and participation in our Compliance Sutra initiative, which has been running successfully for over two years.

To ensure we continue delivering meaningful value, we are pleased to announce the last sessions for the FY 2025-26, which focus on one of our key areas: **Digital Onboarding**.

1. APMI has been actively focusing on accelerating the digital onboarding journey for investors and we have been working closely with various stakeholders to simplify and standardize processes for our Members.
2. Recently, we released Version 2 of our Digital Onboarding Circular and conducted two focused sessions with **Lyke Software regarding digital onboarding for non-individual investors**.
3. Building on this, this month's sessions will focus on digital onboarding for individual investors, exploring how Portfolio Managers can streamline processes, enhance customer experience, maintain robust compliance standards, and **achieve onboarding within a five-hour timeline**.
 - This initiative is another step in that direction, showcasing a model where digital onboarding for individual investors is completed within **five hours through a custodian-led framework**.

We look forward to your continued engagement and participation.

I: Digital Onboarding for Individuals in 5 Hours- Part I.

- **Day & Date:** Tuesday, 24th March 2026
- **Time:** 4:30 pm to 5:30 pm
- **Meeting link:** <https://meet.google.com/nkz-nejt-zcq>

II: Digital Onboarding for Individuals in 5 Hours- Part II.

- **Day & Date:** Monday, 30th March 2026
- **Time:** 4:00 pm to 5:00 pm
- **Meeting link:** <https://meet.google.com/ywr-cncn-cfc>

Please note that presentations from previous *Compliance Sutra* sessions are accessible through your Member Desk login. These sessions are specifically designed to address the unique needs of emerging PMS players. We look forward to your active participation and hope you will find these sessions engaging and valuable.

Please share your feedback and thoughts with us at feedback@apmiindia.org.

Kindly note that these sessions are only for APMI Members.

Thanks & Warm Regards
Association of Portfolio Managers in India

APMI: www.apmiindia.org

PMS Industry Compendium: <https://apmiindia.org/apmi/industryCompendium.htm?action=downloadNovember2025Compendium>

APMI INSIGHTS: <https://insights.apmiindia.org/dashboard>

APMI Compliance Sutra: <https://apmiindia.org/apmi/welcome.htm#>

#INDUSTRYSPEAKS: <https://apmiindia.org/apmi/industryspeaks.htm?action=industryspeak>

- *Please note that we have moved to our New Office.*
- *Our address is: 304- Madhava, C-4, E-Block, Bandra Kurla Complex, Bandra East, Mumbai - 400051.*