



Greetings from the Association of Portfolio Managers in India!

The changes that are brought forth with technology have forced many businesses to implement digital transformation. Organizations now are able to streamline their processes through digitalization, and are also exploring new avenues of growth by adopting 100% digitization- One such major change that has come into the financial services industry is- **digital client on-boarding**.

Clients on-boarding through the digital route is now a well-accepted way which provides scalability, efficiency and much more. Mutual Funds have been a clear example of how a seamless and fully digital client onboarding can help and expedite the client journey.

- **Taking the above forward:** Through this survey, APMI is reaching out to you for collecting views/thoughts and feedback on your journey and process of digital client onboarding.
- **The purpose of conducting this survey** is to collect feedback and data points, which can help us in strengthening our submission with SEBI on Digital Client On-boarding and find possible solutions.

Looking forward to hearing from you and getting your feedback by Thursday 20th July'23: https://docs.google.com/forms/d/1vLW8Y3Qjrp_bZgt1gTSuJ2f5SDjyROXUHve2lpeQK90/edit

Warm Regards,
Principal Officer
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