



To: **APMI Members & Non-Members**
From: APMI Principal Officer
Subject: **Steps for uploading the Client breakup details**

Steps for uploading the [Client breakup details](#)

- Log into APMI Portal <https://www.apmiindia.org/apmi/login.htm> using your login credentials.
- After clicking on the main menu button- depicted as 3 red horizontal bars on the left-hand side of the portal:
 - a. Click on '**Utilities**'
 - b. Select '**Monthly Client Breakup Utility**'.
 - i. Select '**Month and Year**' for which details are being uploaded.
 - ii. Select your '**Service Type**'.
 - iii. Fill the details in the relevant fields.
 - iv. Click on '**Submit**' button.
 - v. You will get a pop-up message on your screen- that your client breakup details have been submitted.

Regards,

Association of Portfolio Managers in India
10B121, WeWork- Enam Sambhav
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APMI

ASSOCIATION OF
PORTFOLIOMANAGERS
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