**<<date>>**

**<<Client Name>>**

**Address: <<Address>>**

**Dear Sir / Madam,**

We take great pleasure in offering our Portfolio Management Services. Your PMS account details for Online access are given below, you can view your PMS investment 24 X7 from anywhere. It will be our endeavour to provide service with the highest levels of integrity and transparency.

Given below are your details in our record for future communication:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Date of Activation** | <<Date of Activation>> | | **PMS Account Code** | | | <<PMS Account Code>> |
| **Strategy Opted** | <<Strategy Opted>> | | | | | |
| **Strategy Bench Mark** | <<Strategy Bench Mark>> | | | | | |
| **Registered email id** | <<Registered email id>> | | **Registered Mobile No.** | | | <<Registered Mobile no.>> |
|  | | | | | | |
| **Introducers Detail:** | | | | | | |
| **Name of Introducer / Distributor** | | <<Name of Distributor>> | | | | |
| **Name of Relationship Manager** | | <<Name of RM>> | | | | |
| **Relationship Manager Email ID** | | <<RM email id>> | | **Mobile No.** | <<Mobile no.>> | |
| **Contact details of Portfolio Manager** | | 022 66322353 / 022 66322485 | | **Email ID** | [plpmsoperations@plindia.com](mailto:plpmsoperations@plindia.com) | |

|  |  |
| --- | --- |
| **Initial Corpus Received:** | |
| **Total Corpus Introduced** | <<Total Corpus>> |
| **Fund** | <<Fund>> |
| **Securities** | <<Securities>> |

In case of any further information, you may call on **022 66322353/022 66322485** or email us at**plpmsoperations@plindia.com**

We hope you have a pleasant and rewarding investing experience with us.

Assuring you of our best service, always!

Yours Truly,

**Prabhudas Lilladher Pvt. Ltd.**



**Authorised Signatory**

**Dear Sir/Madam,**

We take great pleasure in offering our Portfolio Management Services Online, which will give you access to your account information anytime, anywhere. It will be our endeavor to provide service with the highest levels of integrity and transparency.

Please find below your online account details:

|  |  |
| --- | --- |
| **Details of Web Access** | |
| **Web Site Address** | www.plindia.com |
| **Login Id** | <<Login Id>> |
| **Password** | <<pass>> |
| **Whatsapp Chatbot Number** | +91 7400432222 |

**Instructions for Login:**

Type the above link (www.plindia.com) **>** Click on Products **>>** Click on Portfolio Management Services **>>>** Click to PMS login and type user id and password.

**Features Portfolio Management Services Online**

1. **Home Page – Dashboard** (Will be available as on Previous Month end)
2. **One View** (Daily basis - Updated end of the day).
   1. Summary of Accounts
   2. Key Portfolio Action
3. **Holdings Direct Equity & Mutual Fund** (Will be available as on Previous Month end)
4. **Profit And Loss Reports** (Will be available as on Previous Month end)
   1. Realized Gain Loss
   2. Income Statement
   3. Fee Statement
   4. Expense Statement
   5. Balance Sheet
5. **Activity In Portfolio** (Will be available as on Previous Month end)
   1. Transaction Details
   2. Corporate Actions
   3. Capital Invested
   4. Bank Position

**We recommend to change your password after the first login.**

Feel free to contact your Relationship Manager for any queries/clarifications or mail us at **pmsdesk@plindia.com**

Yours Truly,

**Prabhudas Lilladher Pvt. Ltd.**



**Authorised Signatory**