

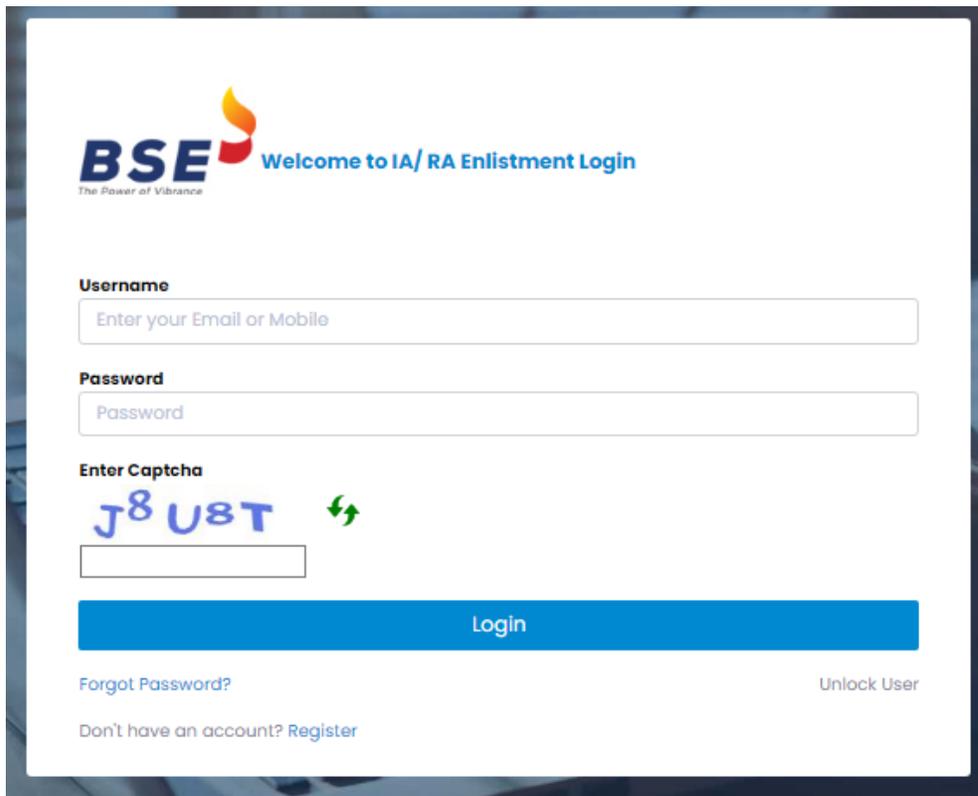
## USER MANUAL FOR SUBMISSION OF PERIODIC REPORTING RESEARCH ANALYST

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1. Login into BSE RAIA Membership Portal using your credentials in the link given below.

<https://membershipraia.bseindia.com/>

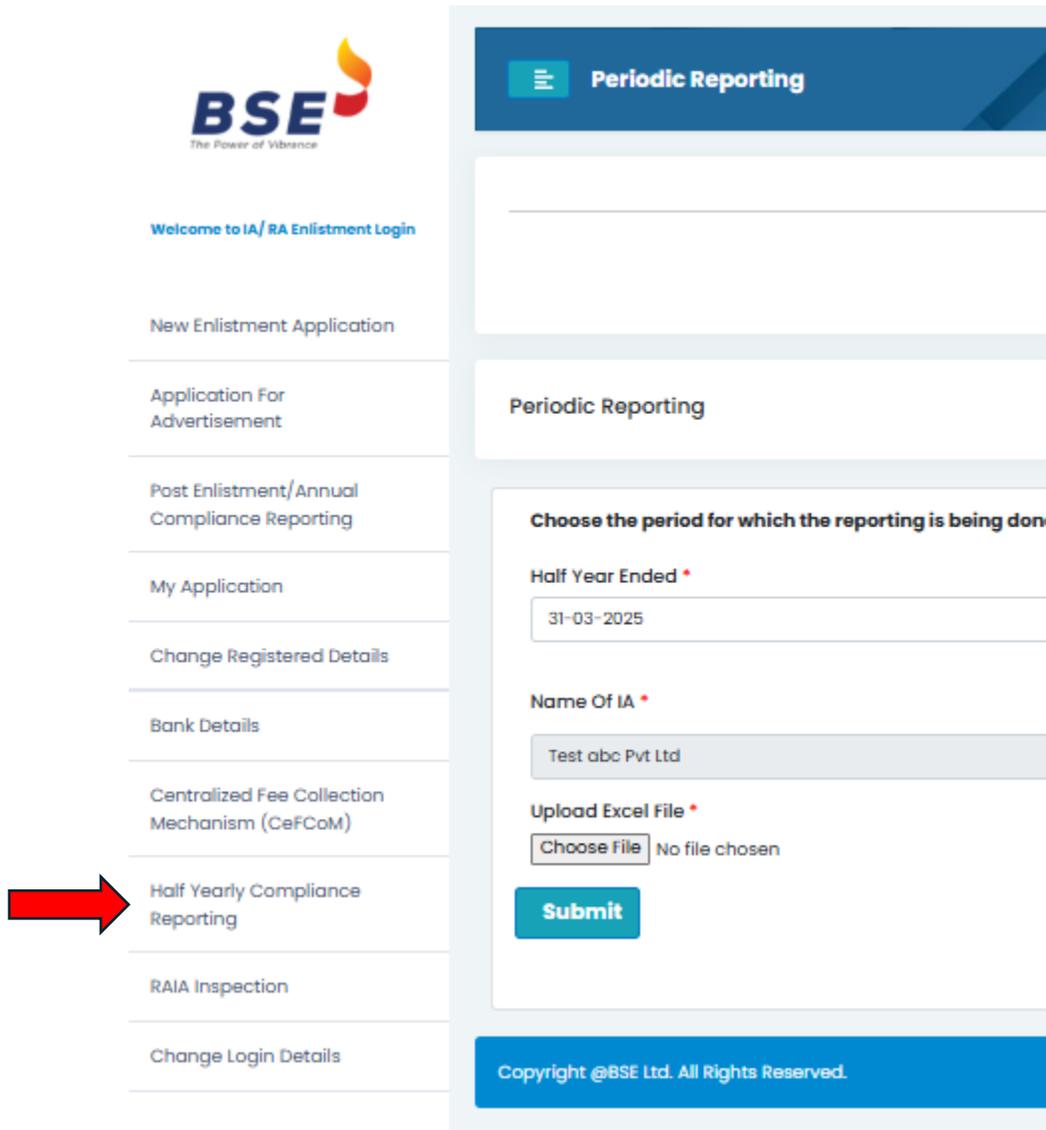
2. Enter your credentials which you have created while submitting your registration application and click on login. In case if you are not aware of your credentials then mark mail to [iara.compliance@bseindia.com](mailto:iara.compliance@bseindia.com) with Subject link (RA LOGIN required for periodic submission). Please do not create new login.



The screenshot shows the BSE RAIA Enlistment Login page. At the top left is the BSE logo with the tagline "The Power of Vibrance". To the right of the logo is the text "Welcome to IA/ RA Enlistment Login". Below this, there are three input fields: "Username" with a placeholder "Enter your Email or Mobile", "Password" with a placeholder "Password", and "Enter Captcha" with a captcha image showing "J8 U8T" and a refresh icon. Below the captcha field is a blue "Login" button. At the bottom left, there are links for "Forgot Password?" and "Don't have an account? Register". At the bottom right, there is a link for "Unlock User".

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3. Click on “Half Yearly Compliance Reporting”.



The screenshot shows the BSE portal interface. On the left is a navigation sidebar with the BSE logo and the tagline 'The Power of Vibrance'. Below the logo is the text 'Welcome to IA/ RA Enlistment Login'. The sidebar contains several menu items: 'New Enlistment Application', 'Application For Advertisement', 'Post Enlistment/Annual Compliance Reporting', 'My Application', 'Change Registered Details', 'Bank Details', 'Centralized Fee Collection Mechanism (CeFCoM)', 'Half Yearly Compliance Reporting' (highlighted with a red arrow), 'RAIA Inspection', and 'Change Login Details'. The main content area has a blue header with a hamburger menu icon and the text 'Periodic Reporting'. Below this is a section titled 'Periodic Reporting' containing a form. The form has a heading 'Choose the period for which the reporting is being done'. It includes a 'Half Year Ended' field with a red asterisk and a date input field containing '31-03-2025'. Below that is a 'Name Of IA' field with a red asterisk and a text input field containing 'Test abc Pvt Ltd'. The next section is 'Upload Excel File' with a red asterisk, a 'Choose File' button, and the text 'No file chosen'. At the bottom of the form is a blue 'Submit' button. The footer of the page contains the text 'Copyright @BSE Ltd. All Rights Reserved.'

4. Below page shall appear once you click on “Half Yearly Compliance Reporting”

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Welcome to IA/ RA Enlistment Login

New Enlistment Application

Application For Advertisement

Post Enlistment/Annual Compliance Reporting

My Application

Bank Details

Centralized Fee Collection Mechanism (CeFCoM)

Half Yearly Compliance Reporting

RAIA Inspection

Change Login Details

Half Yearly Compliance Reporting

**RA Periodic Report**

Half Year Ended: --- Select Period ---

Name of registered RA: test abc pvt ltd

SEBI registration no.: INH1256987453

BSE Enlistment No.: 6405

Upload the XML file

Choose File No file chosen

**Submit**

[Download RA Periodic Report](#)

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5. Now Click on 'Download periodic excel utility' as shown below.

Welcome to IA/ RA Enlistment Login

New Enlistment Application

Application For Advertisement

Post Enlistment/Annual Compliance Reporting

My Application

Bank Details

Centralized Fee Collection Mechanism (CeFCoM)

Half Yearly Compliance Reporting

RAIA Inspection

Change Login Details

Half Yearly Compliance Reporting

**RA Periodic Report**

Half Year Ended: --- Select Period ---

Name of registered RA: test abc pvt ltd

SEBI registration no.: INH1256987453

BSE Enlistment No.: 6405

Upload the XML file

Choose File No file chosen

**Submit**

[Download RA Periodic Report](#)

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6. Please read carefully below section for instructions to be followed before downloading the excel file.
  - a) The version of Microsoft Excel in your system should be Microsoft Office Excel 2007 and above.
  - b) The system should have a file compression software to unzip excel utility file.
  - c) Make sure that you have downloaded the latest Excel Utility from BSE Membership portal to your local system.
  - d) You need to save this downloaded file in C or D drive. Then close the file.
  - e) Right Click on Workbook File in your C or D drive - Goto Properties - General tab ensure that you check the Unblock box in the Security section then Click on Apply. Now open the workbook again, and the error message should disappear.
  - f) You are required to check whether the macros are enabled in your system. Please refer Enable Macro – Manual for the same and in case if the said settings are not enabled in your system, then follow the manual to enable the macros. Once the setting as per user manual is done all the functionalities of Excel Utility shall work. In case if you still face issues with macros, please contact on Email ID: [xbri.helpdesk@microvistatech.com](mailto:xbri.helpdesk@microvistatech.com) Helpline: 9316749660.
7. Post ensuring the system configuration is done, start filling the excel sheet.
8. Four Steps for Filing
  - A. **Fill up the data:** Navigate to each field of every section in the sheet to provide applicable data in correct format. (Formats will get reflected while filling data.)  
Use paste-special command (Alt +E+S+V) to paste data from another sheet.
  - B. **Validating Sheets:** Click on the "Validate" button to ensure that the sheet has been properly filled and also data has been furnished in proper format. If there are some errors on the

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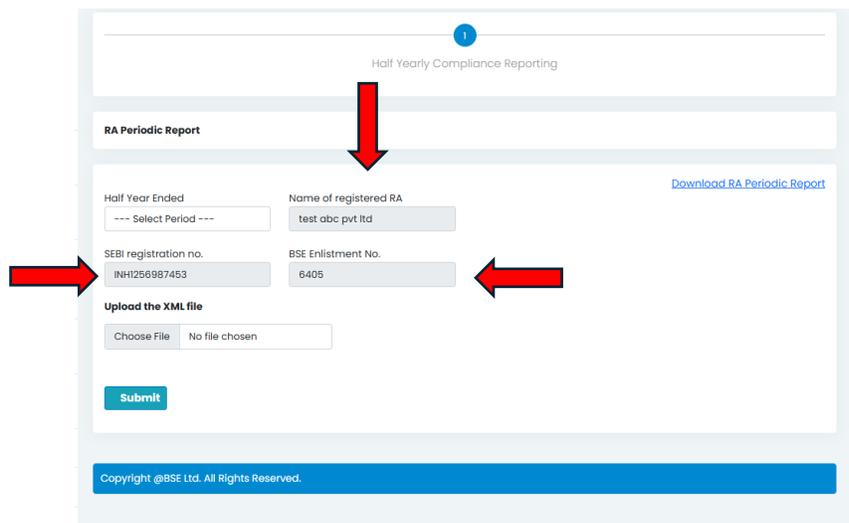
sheet, excel utility will prompt you about the same.

- C. **Validate All Sheets:** Click on the "Validate All Sheet" button to ensure that all sheets have been properly filled and validated successfully. If there are some errors on the sheet, excel utility will prompt you about the same and stop validation at the same time. After correction, once again follow the same procedure to validate all sheets.  
Excel Utility will not allow you to generate XML until you rectify all errors.
- D. **Generate XML:** Excel Utility will not allow you to generate XML unless successful validation of all sheets is completed. Now click on 'Generate XML' to generate XML file.  
- Save the XML file in your desired folder in local system. "
9. Fill the General Details, Client Details and Complaint Details sheets. While filling details in the General Details sheet, certain data which needs to be provided in single/multiples are to be given in additional sheets.
10. Click on "Yes" option from the dropdown provided against fields if you have details to be added w.r.t that field and click on "Add Option" provided.
11. "Add Option" on which you will be redirected to respective additional sheets.
12. Add the number of rows to be added and post filling the details click on "VALIDATE".
13. Once all the additional sheets along with General details page is filled, validate the general details sheet by clicking on "VALIDATE".
14. Similarly, complete filling Complaint Details and Client Details sheets.
15. Ensure that all sheets are validated.
16. Once all the sheets are validated go General details sheet and click on "VALIDATE ALL" option then click on 'GENERATE XML' option. XML file will be generated which needs to be saved.

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17. Now on portal, select the half year for which the filing is being done. Please note that the period selected on this page should match with the half year period mentioned in excel file.

18. BSE Enlistment No., Name of RA & SEBI Registration No will be auto populated as per last approved registration case.



The screenshot shows a web form titled "Half Yearly Compliance Reporting" with a sub-section "RA Periodic Report". The form contains the following fields and elements:

- Half Year Ended:** A dropdown menu with the text "--- Select Period ---".
- Name of registered RA:** A text field containing "test abc pvt ltd". A red arrow points down to this field from the "Half Yearly Compliance Reporting" title.
- SEBI registration no.:** A text field containing "INH256987453". A red arrow points left to this field from the left edge of the form.
- BSE Enlistment No.:** A text field containing "6405". A red arrow points right to this field from the right edge of the form.
- Upload the XML file:** A section with a "Choose File" button and the text "No file chosen".
- Submit:** A blue button at the bottom of the form.
- Download RA Periodic Report:** A blue link located to the right of the "Name of registered RA" field.
- Footer:** A blue bar at the bottom with the text "Copyright @BSE Ltd. All Rights Reserved."

19. Now upload the duly filled Excel sheet & XML file in the portal in the tabs as shown below and submit the application.

# USER MANUAL FOR SUBMISSION OF PERIODIC REPORTING RESEARCH ANALYST

1

Half Yearly Compliance Reporting

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**RA Periodic Report**

[Download RA Periodic Report](#)

Half Year Ended: --- Select Period ---  
Name of registered RA: test abc pvt ltd

SEBI registration no.: INH1256987453  
BSE Enlistment No.: 6405

**Upload the XML file** 

Choose File: No file chosen

**Submit**

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20. Once the application is submitted check the status of your application under My Application.

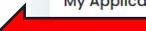
Browser tabs: Cymmetri - Dashboard, Task #141535: Upload SEBI regi, My Applications

URL: testadmin.bseindia.com/RAIA\_Membership/MyApplication.aspx

**BSE** The Power of Vibrance

**Research Analyst (RA)** Welcome Krishna Pandey Logout

**My Applications**

Welcome to IA/ RA Enlistment Log 

New Enlistment Application

Application For Advertisement

Post Enlistment/Annual Compliance Reporting

My Application 

Case Id:  **Submit** 

Case ID	Applicant Name	Application Submission Date	Application Status	Entity Type	Application Type	Date Of Approval	Action	Action	Download BSE Enlistment Letter
99375		27/03/2025	Draft	Partnership	New		<a href="#">Details</a>		
99374		27/03/2025	Draft	Partnership	New		<a href="#">Details</a>		

**USER MANUAL FOR SUBMISSION OF PERIODIC REPORTING  
RESEARCH ANALYST**

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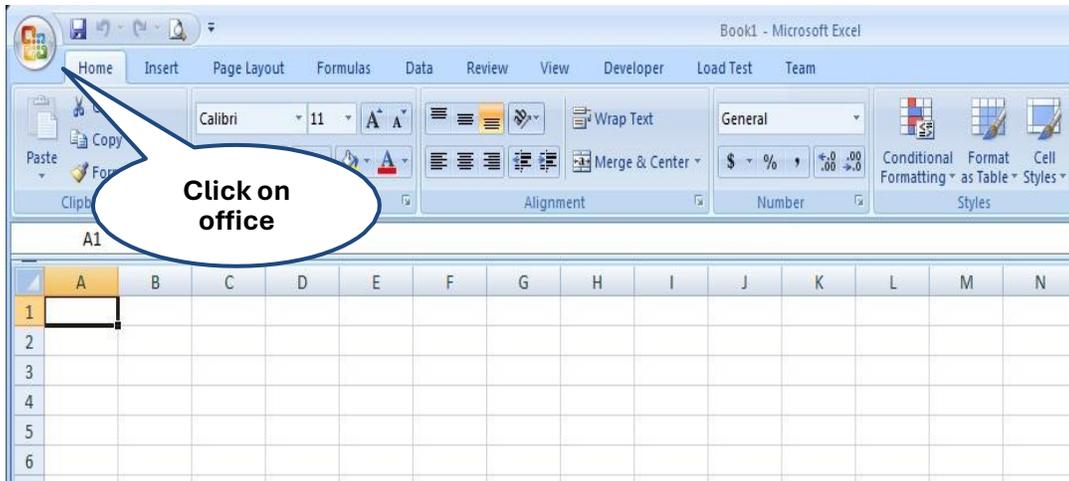
## **User Guide for Enabling Macro - Microsoft Excel**

1. <i>Steps to Enable Macro Microsoft Excel 2007</i> .....	2
2. <i>Steps to Enable Macro Microsoft Excel 2010</i> .....	6
3. <i>Steps to Enable Macro Microsoft Excel 2013 &amp; above</i> .....	9

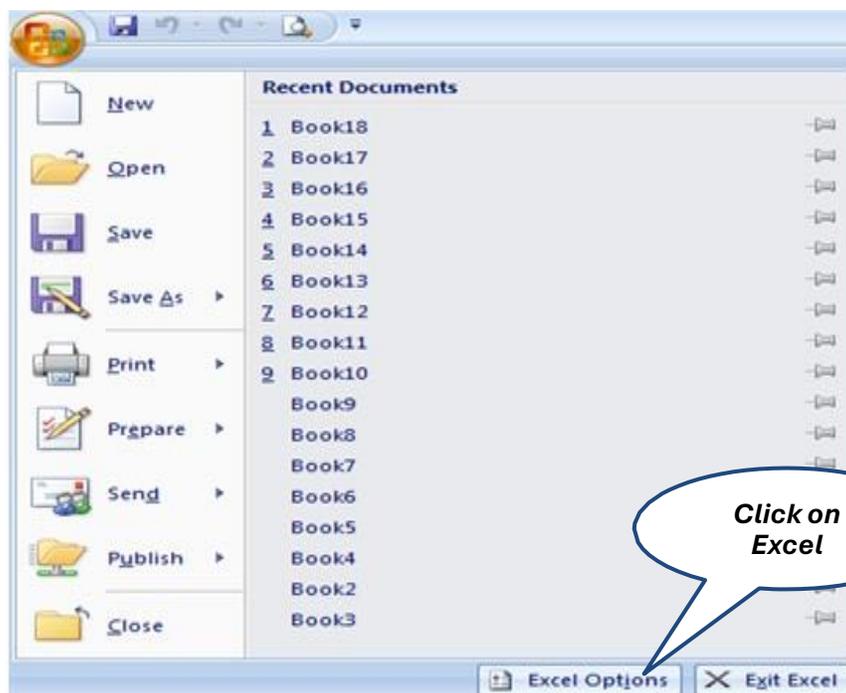
# USER MANUAL FOR SUBMISSION OF PERIODIC REPORTING RESEARCH ANALYST

## 1. Steps to enable macro Microsoft Excel 2007

**Step 1.** Open Excel 2007 & click on Office button. The Office button located in the upperleft corner of the screen.

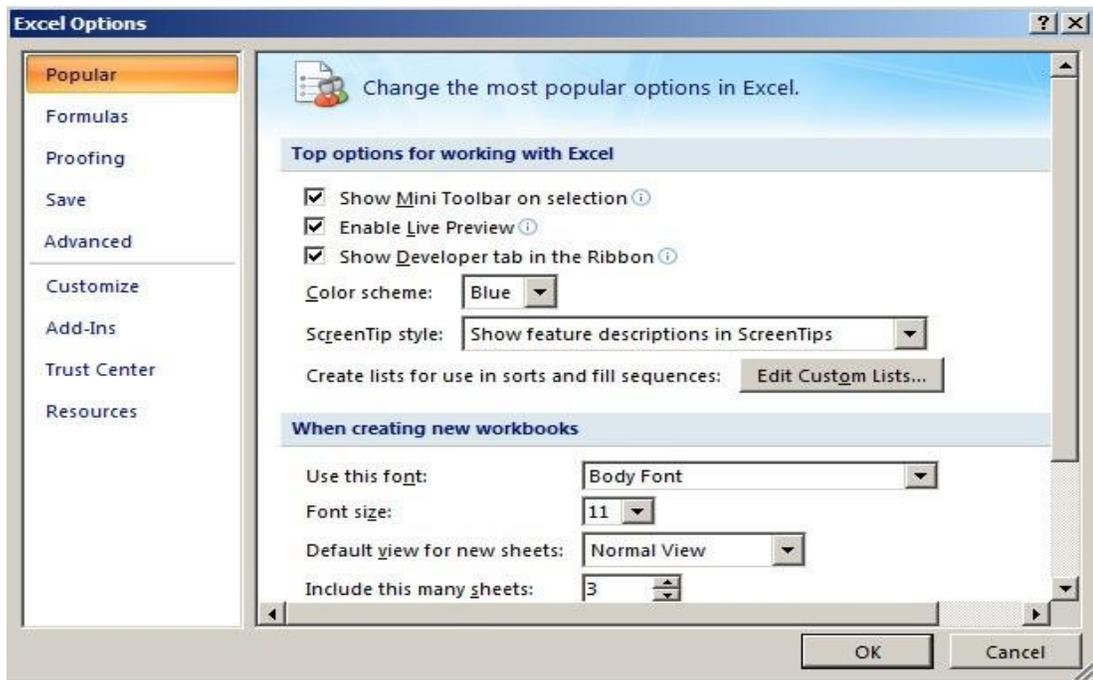


**Step 2.** Click on **Excel Options** button, located at the bottom of this menu.



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**Step 3.** Now you can see this window there is more option

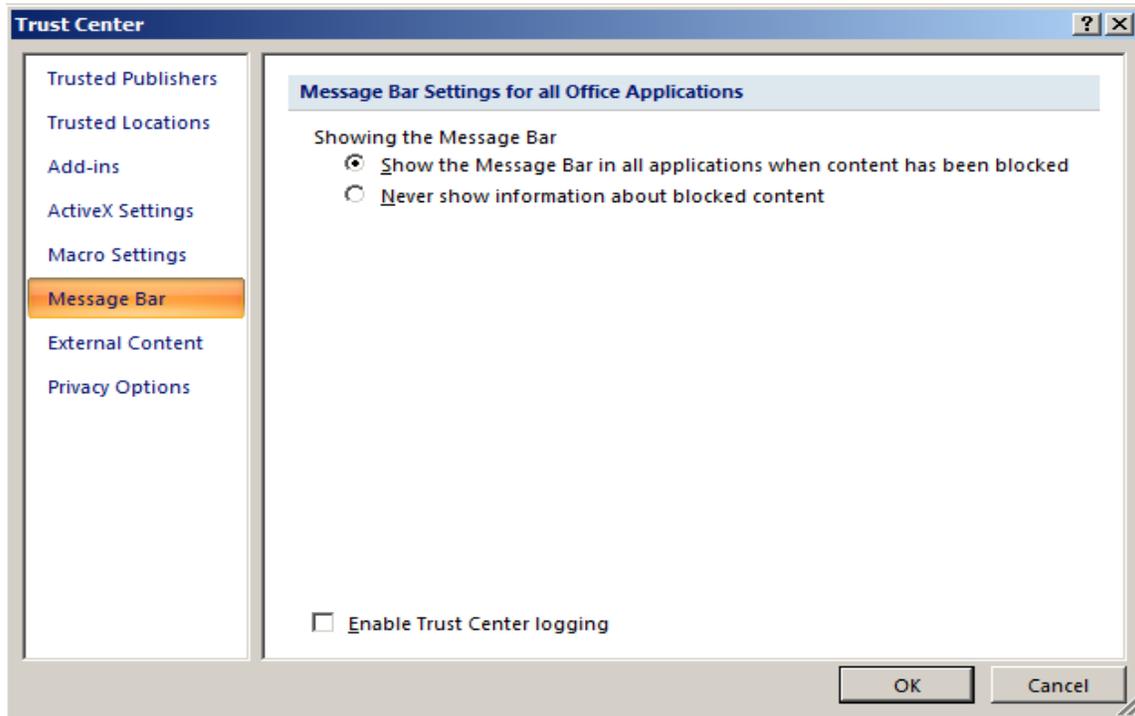


**Step 4.** Now click on the Trust center button so you see this window & click on the Trust center settings.

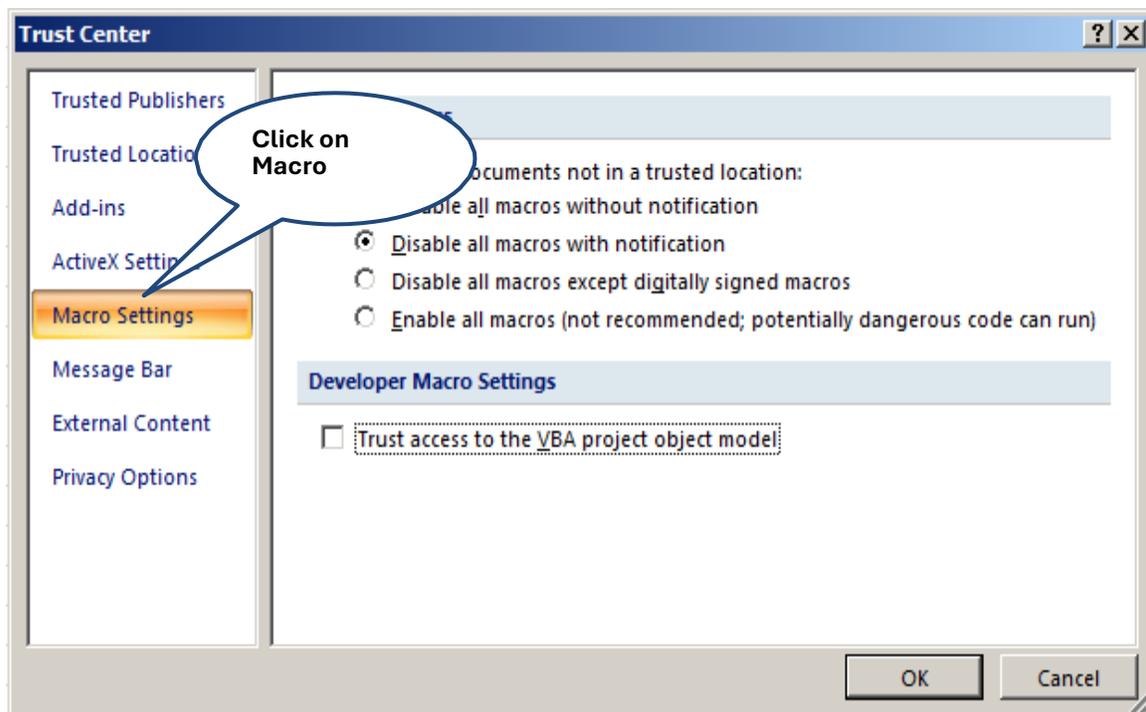


# USER MANUAL FOR SUBMISSION OF PERIODIC REPORTING RESEARCH ANALYST

*Step 5.* Trust Centre window will be open.



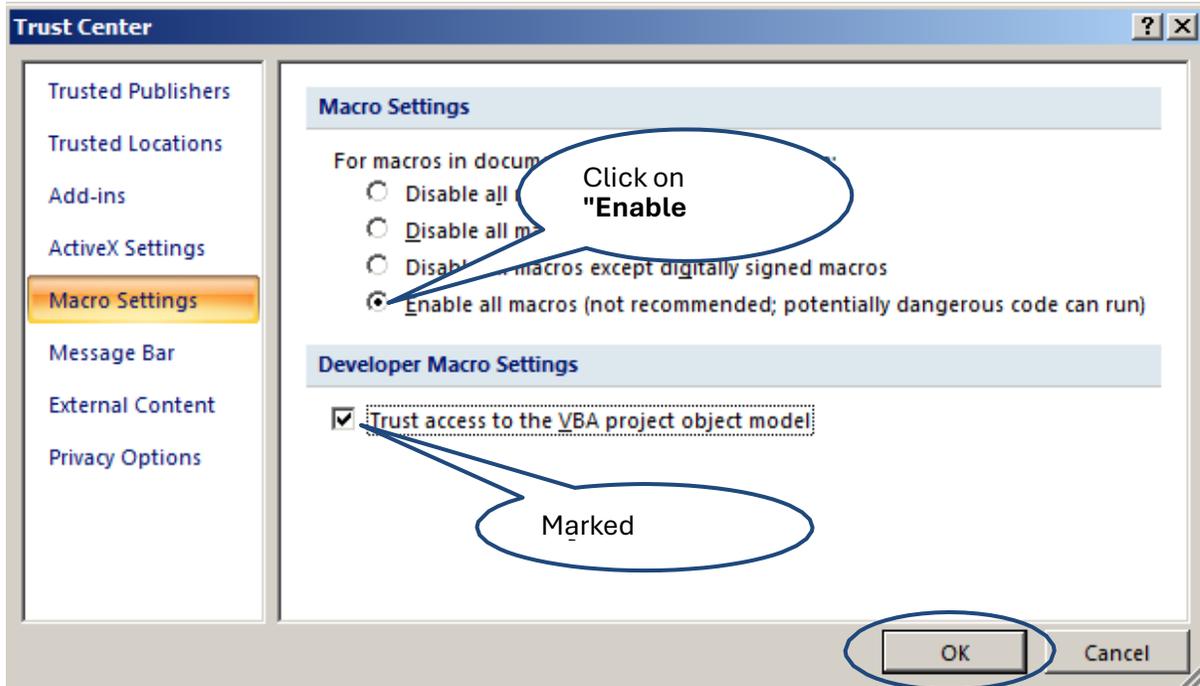
*Step 6.* Now Click on **Macro Settings** So New windows will appear like given bellow.



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**Step 7.** To Enable Macro settings, select the Option Button Enable All Macros & And select the check box given bellow

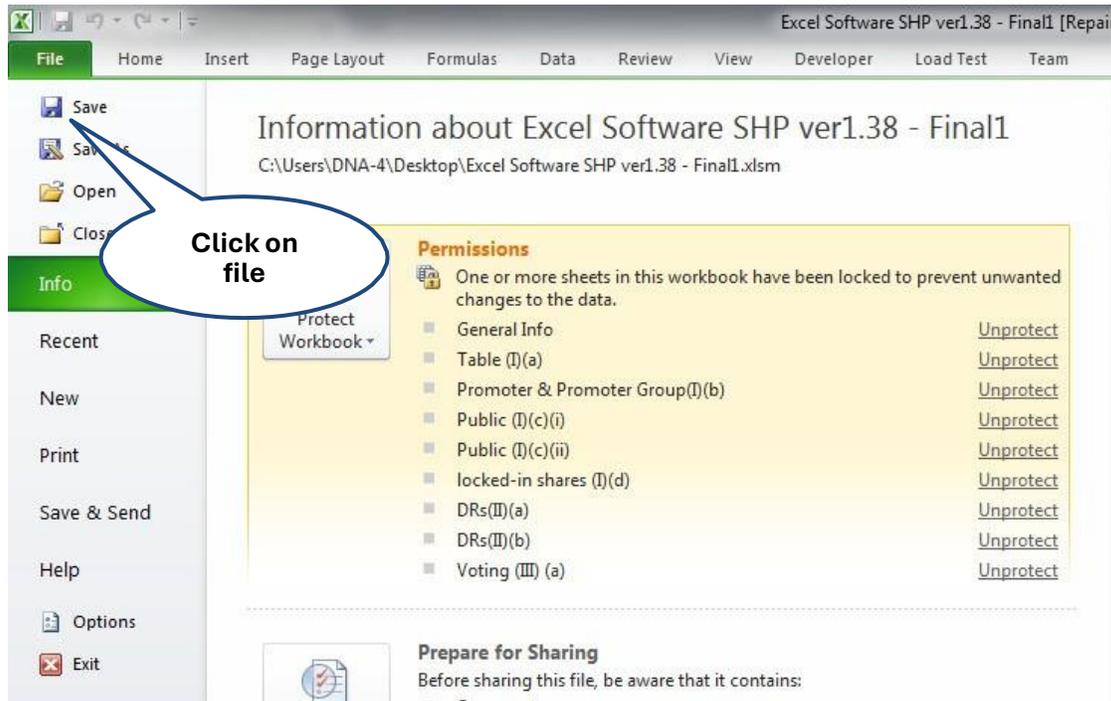
Trust access to the VBA project object model and give "OK"



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## 2. Steps to enable macro-Microsoft Excel 2010

**Step 1.** Open Excel 2010 & click on File menu, Office button located in the upper left corner of the screen.



**Step 2.** Click on **Excel Options** button, located at the bottom of this menu.

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Excel Software SHP ver1.38 - Final1 [Repair]

File Home Insert Page Layout Formulas Data Review View Developer Load Test Team

Save  
Save As  
Open  
Close

Info

Recent

New

Print

Save & Send

Help

Options  
Exit

### Information about Excel Software SHP ver1.38 - Final1

C:\Users\DNA-4\Desktop\Excel Software SHP ver1.38 - Final1.xlsm

#### Protect Workbook

#### Permissions

One or more sheets in this workbook have been locked to prevent unwanted changes to the data.

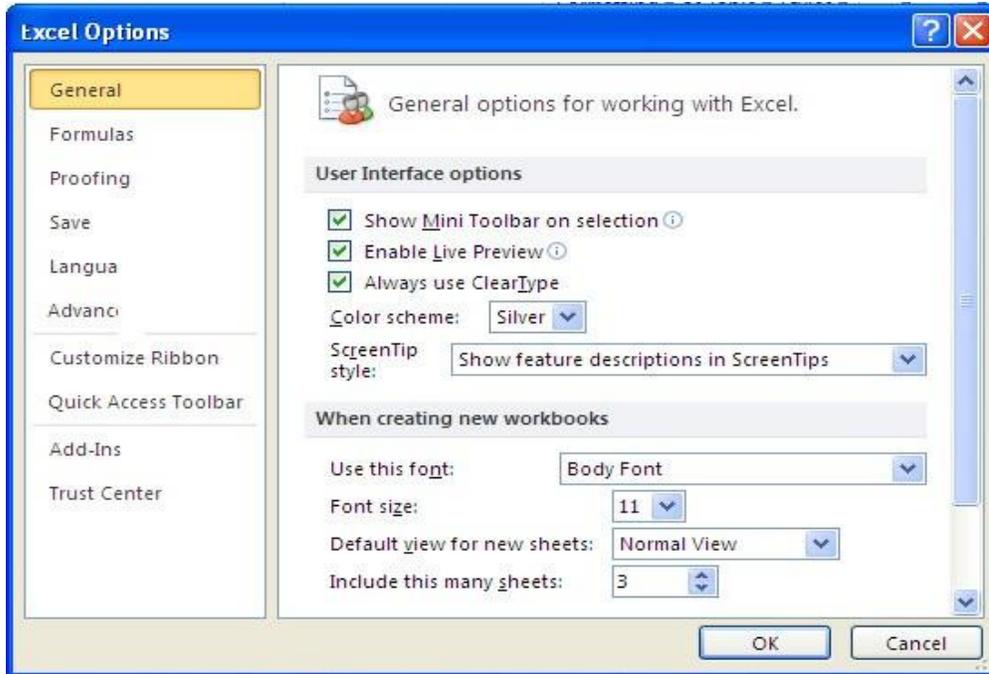
<input type="checkbox"/> General Info	<a href="#">Unprotect</a>
<input type="checkbox"/> Table (I)(a)	<a href="#">Unprotect</a>
<input type="checkbox"/> Promoter & Promoter Group(I)(b)	<a href="#">Unprotect</a>
<input type="checkbox"/> Public (I)(c)(i)	<a href="#">Unprotect</a>
<input type="checkbox"/> Public (I)(c)(ii)	<a href="#">Unprotect</a>
<input type="checkbox"/> locked-in shares (I)(d)	<a href="#">Unprotect</a>
<input type="checkbox"/> DRs(II)(a)	<a href="#">Unprotect</a>
<input type="checkbox"/> DRs(II)(b)	<a href="#">Unprotect</a>
<input type="checkbox"/> Voting (III) (a)	<a href="#">Unprotect</a>

Click on

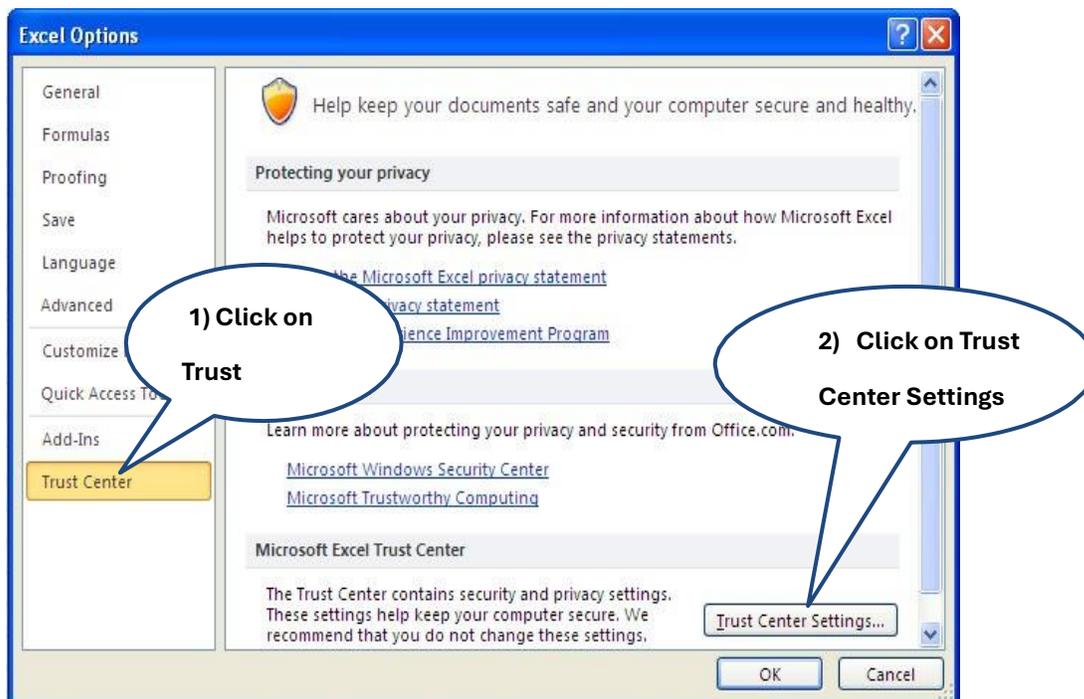
ing  
file, be aware that it contains:

# USER MANUAL FOR SUBMISSION OF PERIODIC REPORTING RESEARCH ANALYST

**Step 3.** Now new window will appear

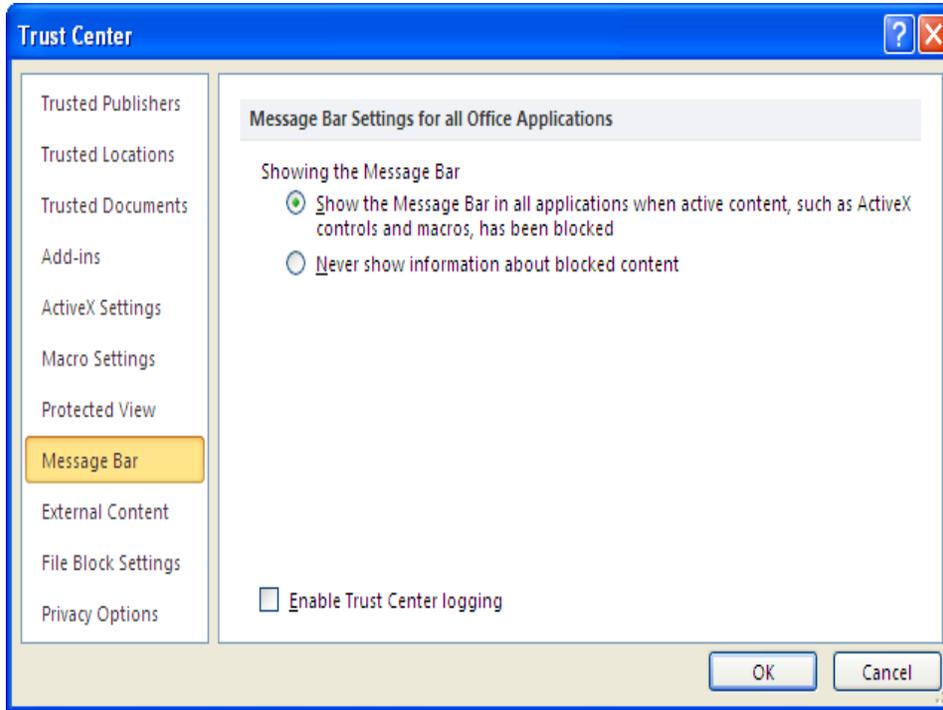


**Step 4.** Click on the **Trust center** button so you see this window & click on the **Trust center settings**.

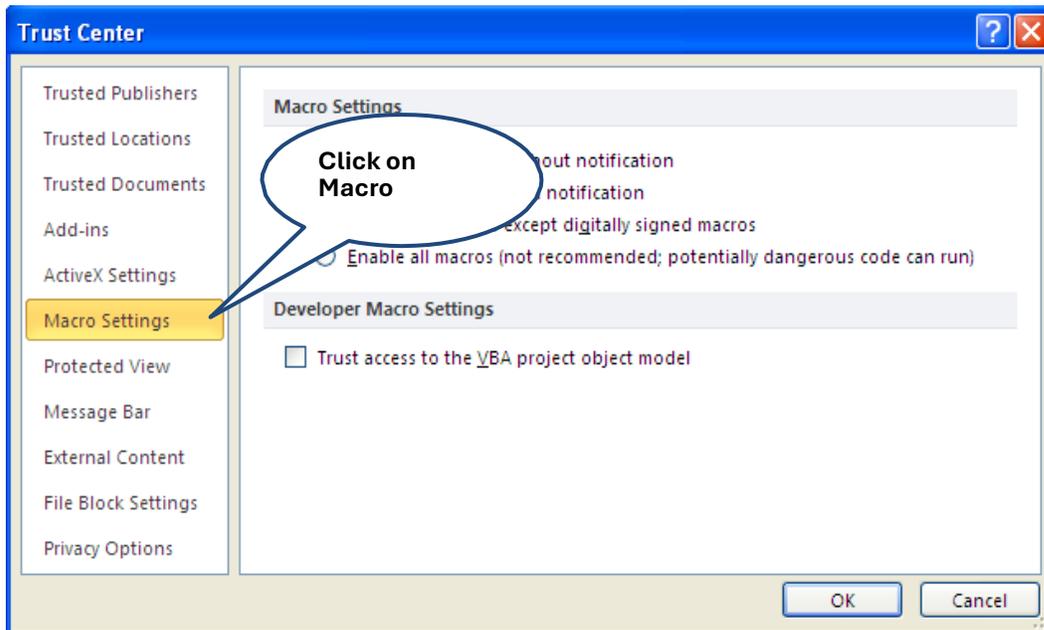


# USER MANUAL FOR SUBMISSION OF PERIODIC REPORTING RESEARCH ANALYST

**Step 5.** Once you click "Trust Center Setting ". This window will appear.



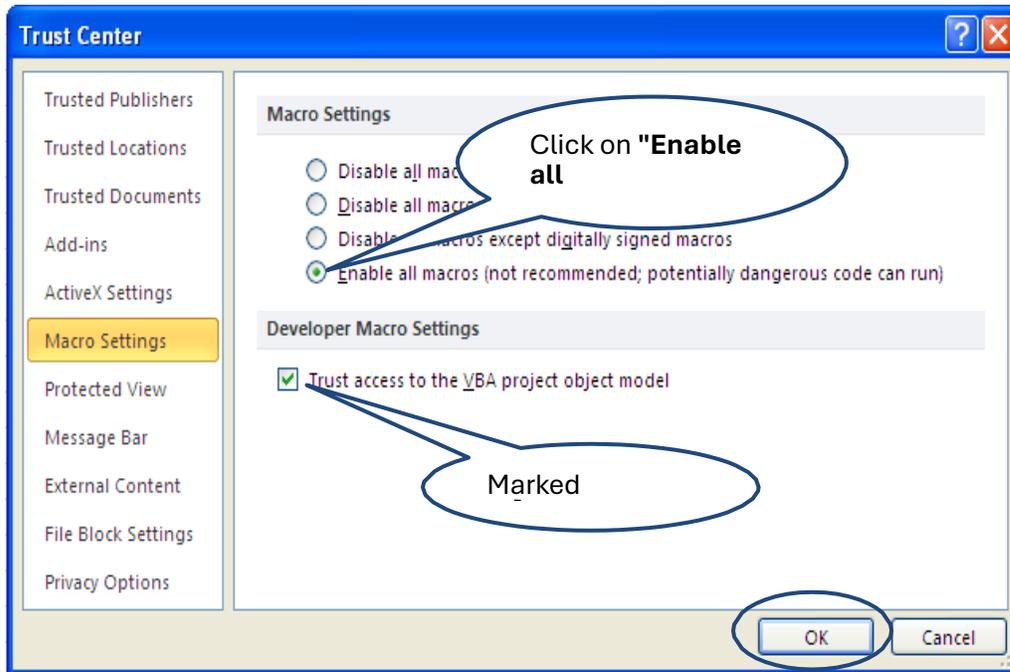
**Step 6.** Now Click on **Macro Settings**.



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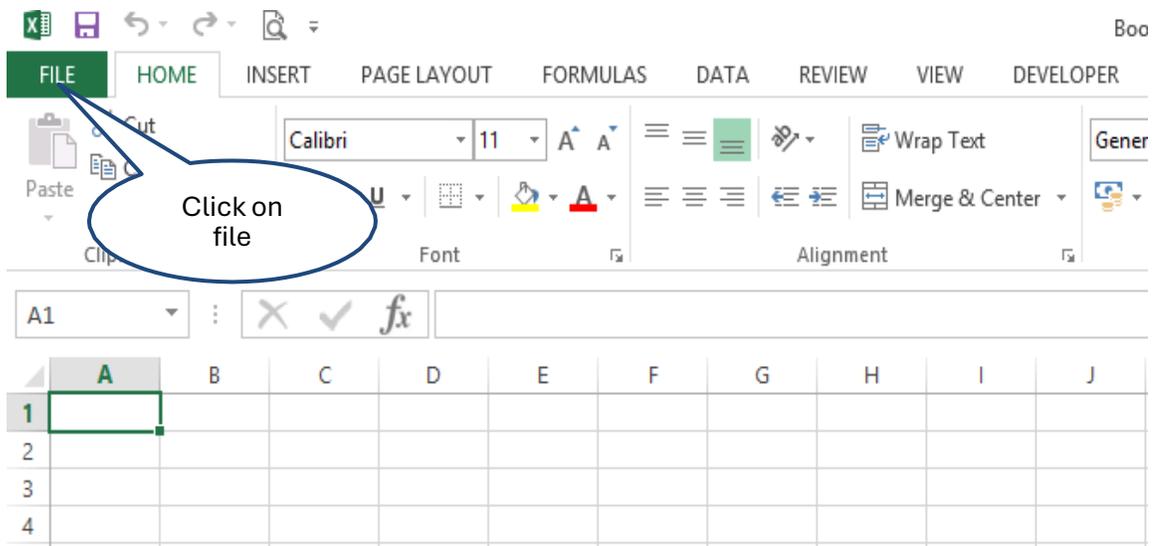
**Step 7.** To Enable Macro settings, select the Option Button "**Enable All Macros** & and Select the check box given bellow

Trust access to the VBA project object model and give "OK"



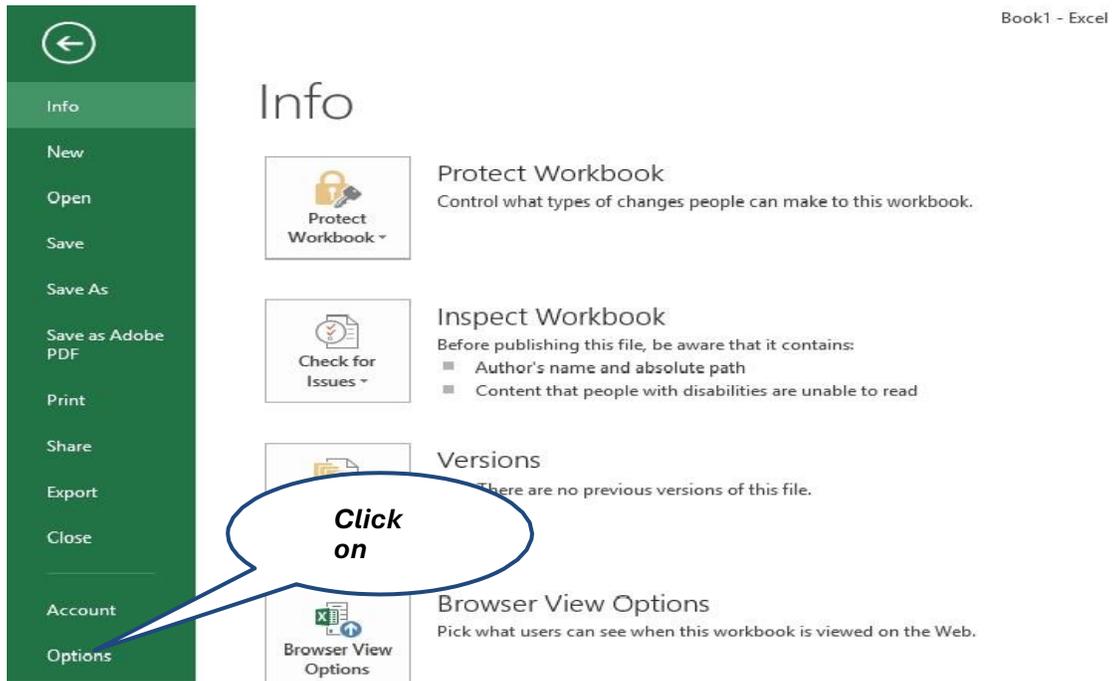
## 3. Steps to enable macro Microsoft Excel 2013 and above

**Step 1.** Open Excel 2013 & click on File menu The Office button located in the upperleft corner of the screen.

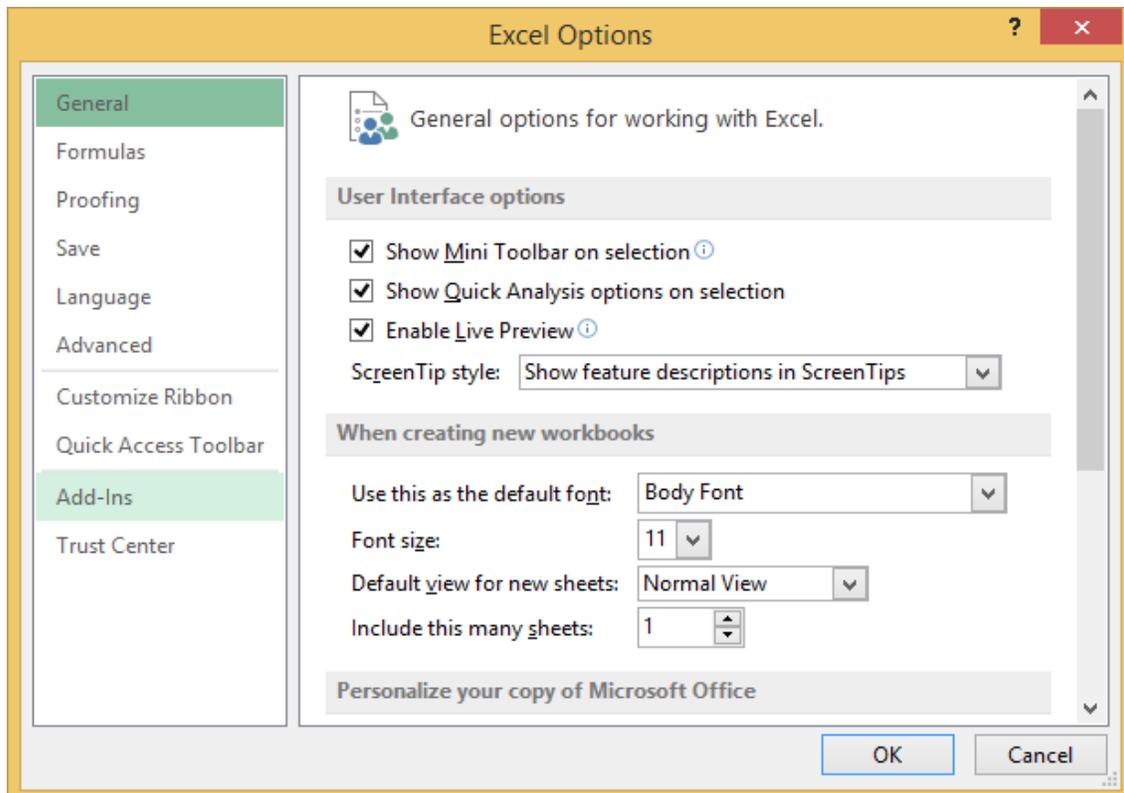


# USER MANUAL FOR SUBMISSION OF PERIODIC REPORTING RESEARCH ANALYST

**Step 2.** Click on **Excel Options** button, located at the bottom of this menu.

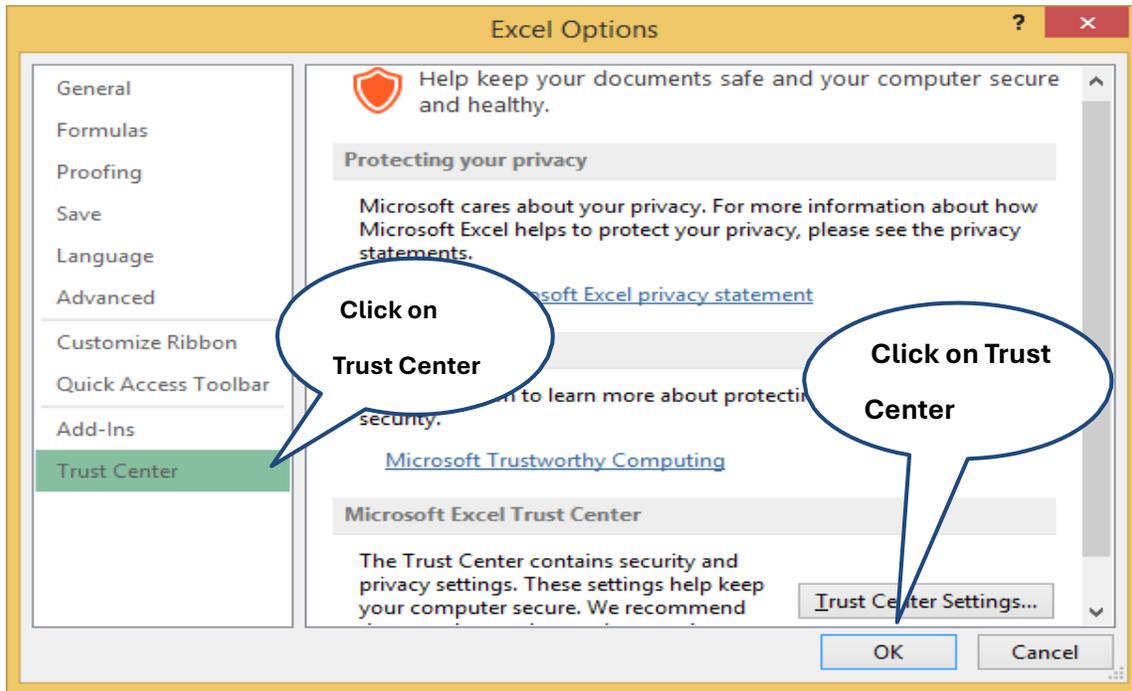


**Step 3.** Now you can see this window there is more option

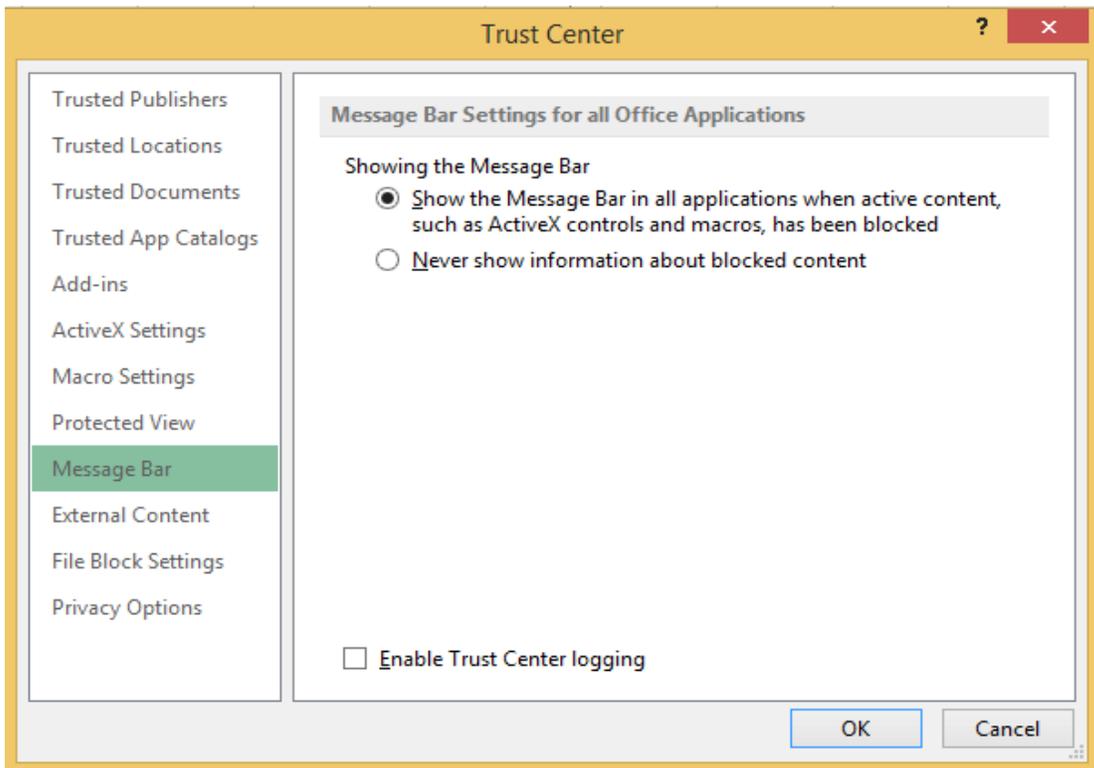


# USER MANUAL FOR SUBMISSION OF PERIODIC REPORTING RESEARCH ANALYST

**Step 4.** Now click on the **Trust center button** so you see this window & click on the **Trust center settings**.

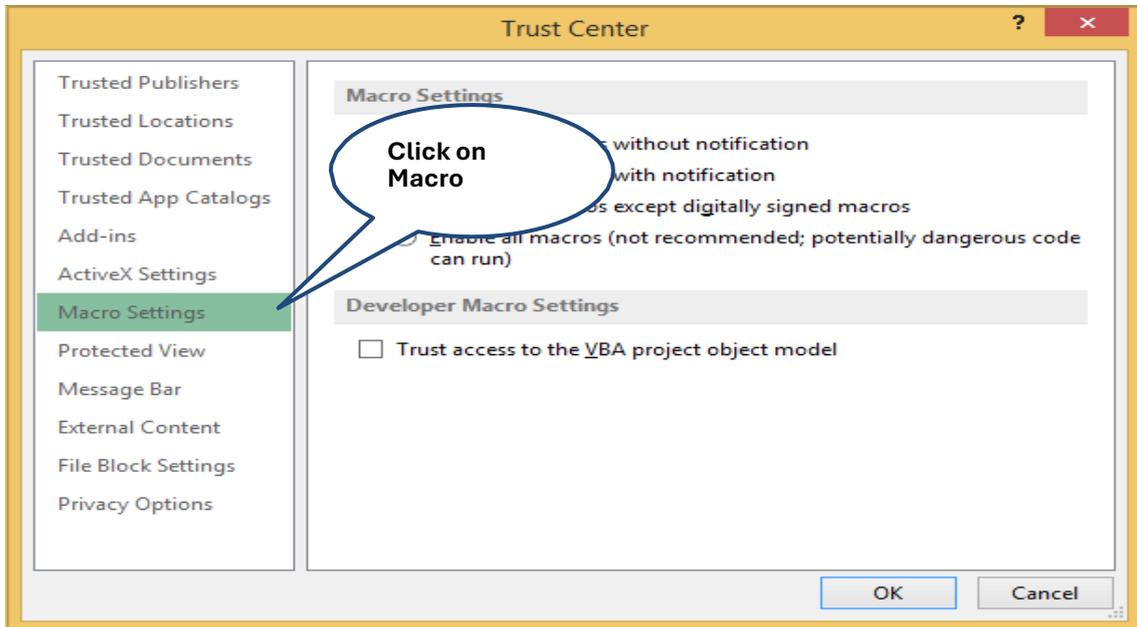


**Step 5.** Then after this window will comes



# USER MANUAL FOR SUBMISSION OF PERIODIC REPORTING RESEARCH ANALYST

**Step 6.** Now Click on **Macro Settings** So new windows will appear like given bellow.



**Step 7.** To enable Macro settings, select the Option Button Enable All Macros & and select the check box given bellow

- Trust access to the VBA project object model and give "OK"

