

Install PMS Core or PMS Plus add-on

Prerequisites

We assume you have all prerequisites you may need, including:

1. [Get Access to Finmars](#)
2. [Link with Finmars ID](#)
3. You have the internet access

About PMS Core and PMS Plus add-ons

The **Portfolio Management Solution (PMS)** is a core Finmars add-on that enables asset managers, investors, and partners to manage, track, and analyze portfolios in one place.

It provides all essential tools for portfolio monitoring, transaction tracking, and performance reporting — available in a fully functional free version, with optional paid features for advanced analytics and automation.

For whom?

- **Asset Managers** finding insights for their portfolios
- **Investors** having control over their assets
- **Partners** developing and providing their solutions

What's Inside?

- **Fully functional** and **Developer friendly FREE Version** with **Paid Advanced options**
- **Configurable reports** Dashboards, Performance, PnL, Balance with **drill down into Transactions**
- **Comprehensive Layouts** for dashboards, reports and data view
- **Smart Import data via Excel** in Standard Format
- Helper functions to **analyze gaps in valuation data** and more
- Standard **Transaction** and **Instrument Types** support

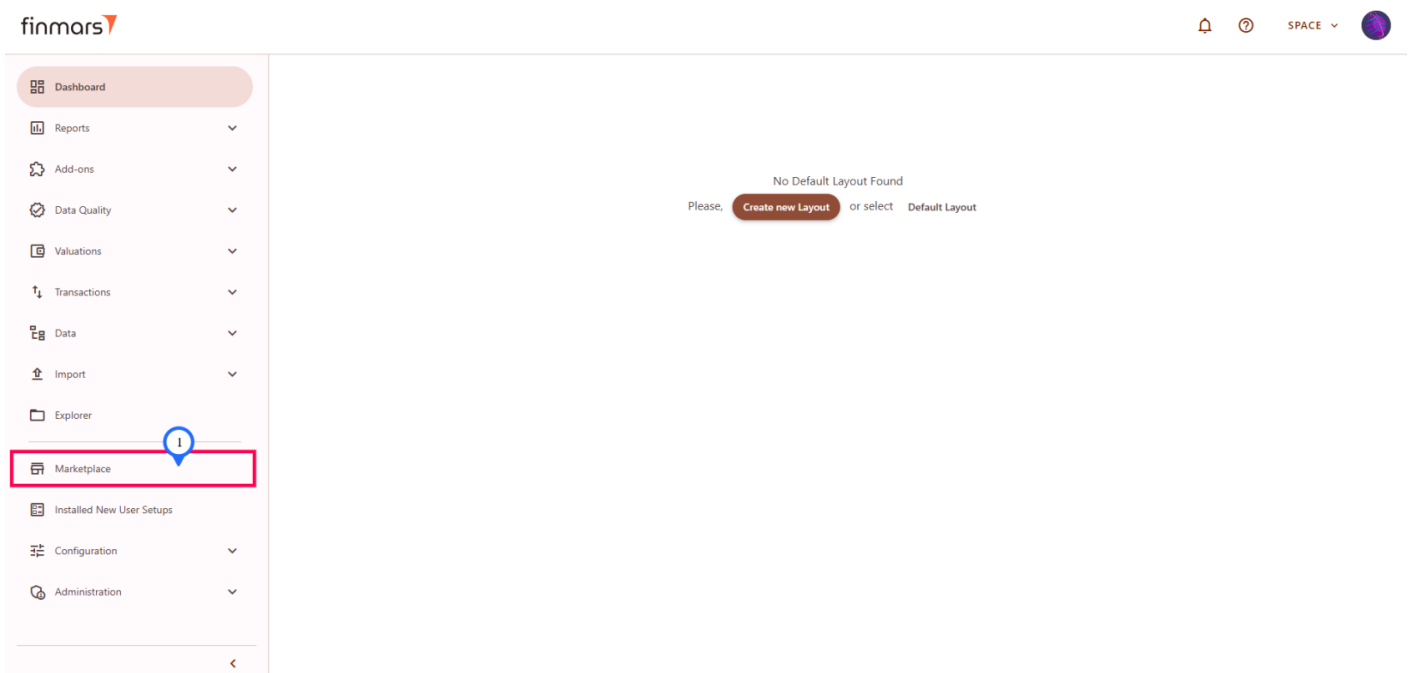
- Extensive **Python Functions** for developers

For more technical details see: [PMS Core and Plus](#)

Installing PMS Core or PMS Plus add-on

After getting access to Finmars Space in the beginning you won't have any add-ons installed. As of now add-ons are distributed via Marketplace which requires the Internet access.

Go to the Marketplace page in the sidebar menu

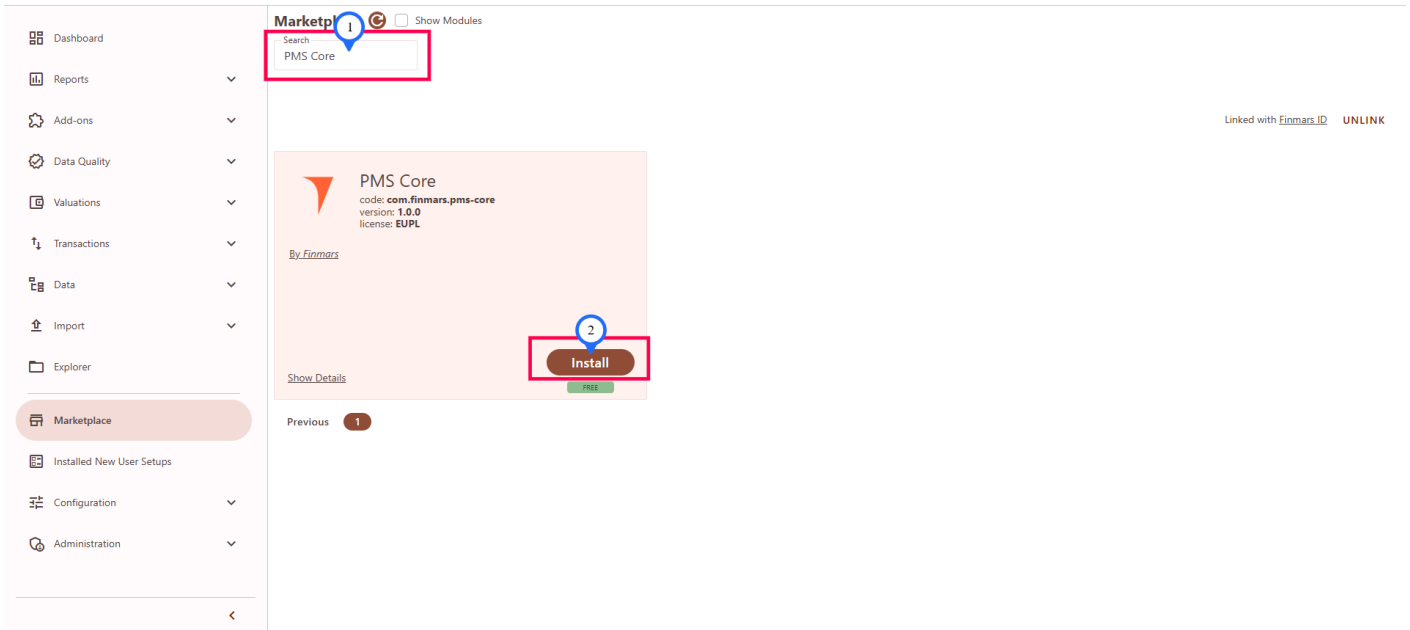


Then depending on your choice you can:

1. Install PMS Core add-on
2. Install PMS Plus add-on

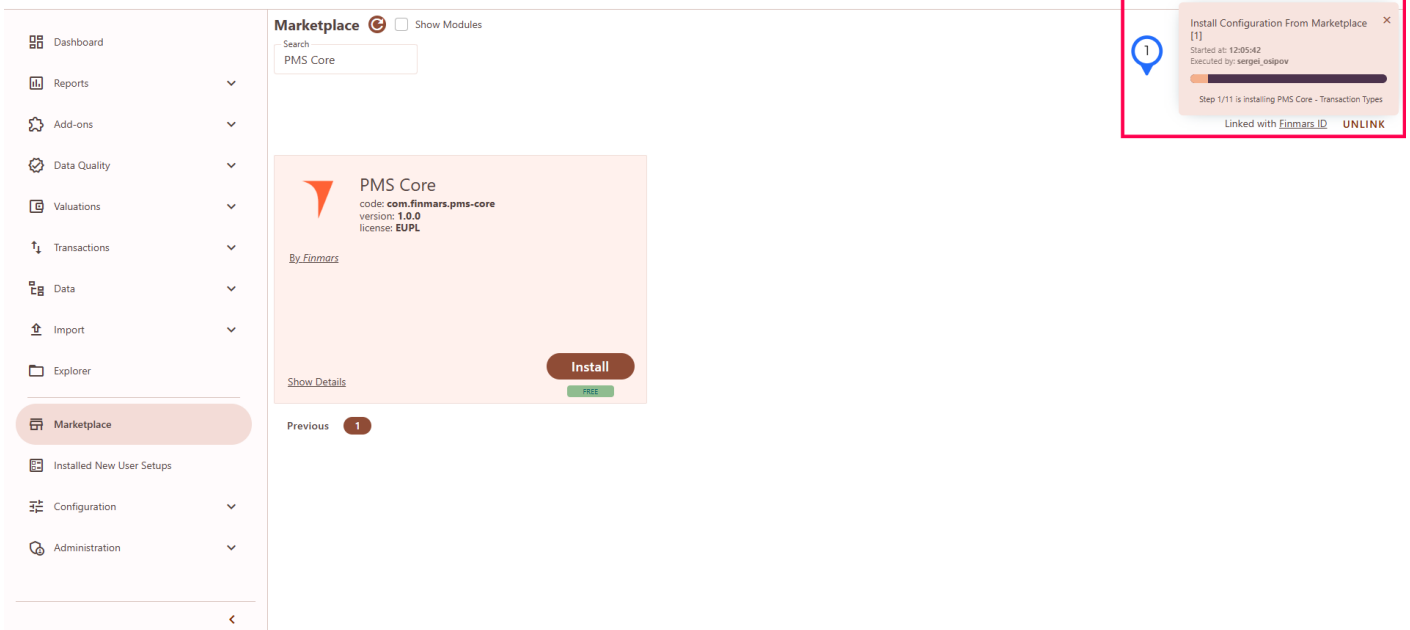
Installing PMS Core add-on

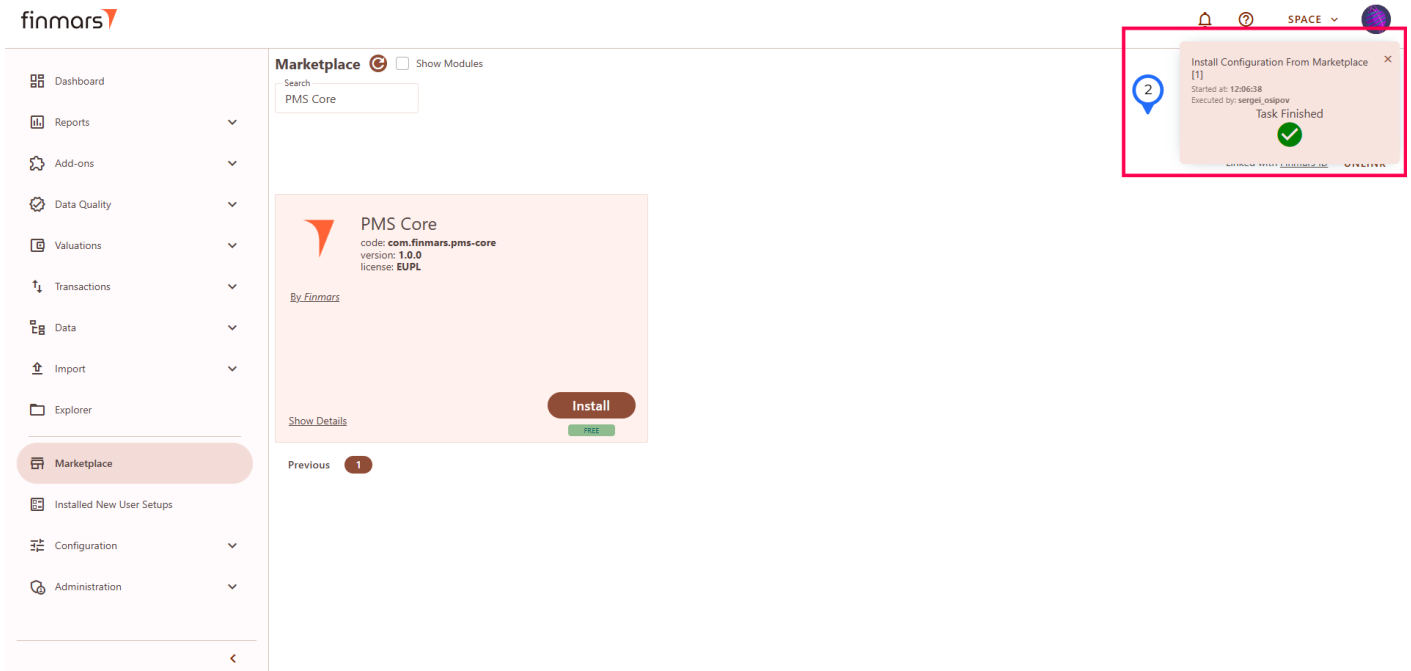
To install Free PMS Core add-on: Search "PMS Core" in the search bar and you will see [PMS Core](#) - Fully functional and Developer friendly FREE version which is subset of [PMS Plus](#)



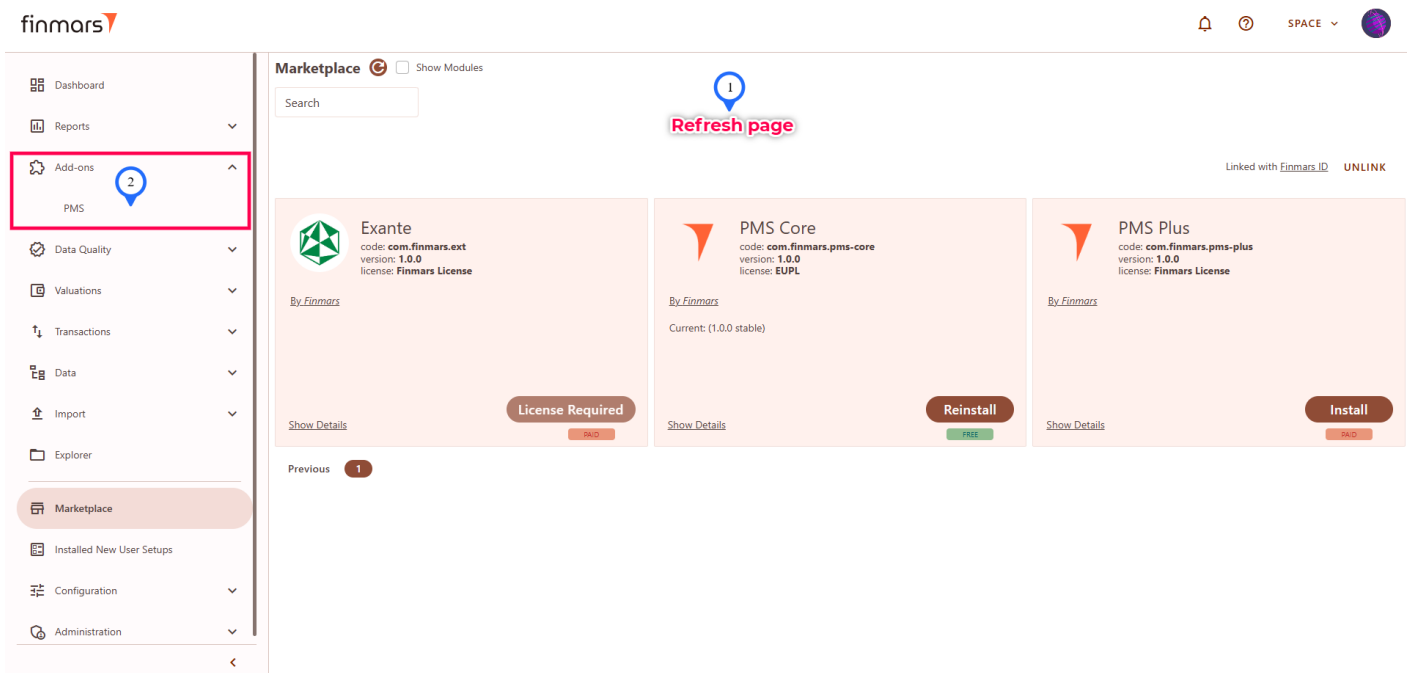
By clicking **Install** you will get the latest version of the PMS Core add-on. For details on the installation process follow [How to Install/Update add-on from Marketplace](#).

You will get progress window which will show you the progress and finish:





After the installation finished refresh the page and you can go to the sidebar menu **Add-ons** and see the "**PMS**" appeared in there.



Installing PMS Plus add-on

PMS Plus add-on **requires access by your license** for installation. Without it for paid add-ons you will see "License Required" button instead of the active "Install" button. To obtain license: [Get License for add-on](#).

Marketplace ☐ Show Modules

Search

Linked with [Finmars ID](#) [UNLINK](#)

Exante
code: `com.finmars.ext`
version: **1.0.0**
license: **Finmars License**
By [Finmars](#)
[Show Details](#)
License Required PAID

PMS Core
code: `com.finmars.pms-core`
version: **1.0.0**
license: **EUPL**
By [Finmars](#)
Current: (1.0.0 stable)
[Show Details](#) **Reinstall** FREE

PMS Plus
code: `com.finmars.pms-plus`
version: **1.0.0**
license: **Finmars License**
By [Finmars](#)
[Show Details](#) **Install** PAID

Previous **1**

After you obtain the license for PMS Plus you can go to the marketplace page, search for "PMS Plus" and click Install button as usual. The installation process will be the same as for PMS Core. And you can install PMS Plus over existing PMS Core.

Marketplace ☐ Show Modules

Search

Install Configuration From Marketplace ✕
[22]
Started at: 12:16:08
Executed by: wenger_osipow
Step 1/13 is installing PMS Core - Transaction Types
[Link with Finmars ID](#) [UNLINK](#)

Exante
code: `com.finmars.ext`
version: **1.0.0**
license: **Finmars License**
By [Finmars](#)
[Show Details](#) **License Required** PAID

PMS Core
code: `com.finmars.pms-core`
version: **1.0.0**
license: **EUPL**
By [Finmars](#)
Current: (1.0.0 stable)
[Show Details](#) **Reinstall** FREE

PMS Plus
code: `com.finmars.pms-plus`
version: **1.0.0**
license: **Finmars License**
By [Finmars](#)
[Show Details](#) **Install** PAID

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finmars

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PMS

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Valuations

Transactions

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Marketplace

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Marketplace

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Exante

code: `com.finmars.ext`
version: 1.0.0
license: Finmars License

By Finmars

Show Details

License Required

PMS Core

code: `com.finmars.pms-core`
version: 1.0.0
license: EUPL

By Finmars

Current: (1.0.0 stable)

Show Details

Reinstall

PMS Plus

code: `com.finmars.pms-plus`
version: 1.0.0
license: Finmars License

By Finmars

Show Details

Install

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Install Configuration From Marketplace [22]

Started at: 12:17:24
Executed by: sergei.osipov

Task Finished

finmars

Dashboard

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Refresh page

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Linked with Finmars ID UNLINK

Exante

code: `com.finmars.ext`
version: 1.0.0
license: Finmars License

By Finmars

Show Details

License Required

PMS Core

code: `com.finmars.pms-core`
version: 1.0.0
license: EUPL

By Finmars

Current: (1.0.0 stable)

Show Details

Reinstall

PMS Plus

code: `com.finmars.pms-plus`
version: 1.0.0
license: Finmars License

By Finmars

Current: (1.0.0 stable)

Show Details

Reinstall

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Revision #31

Created 2025-07-09 11:14:38 UTC by Oleg Greshnev

Updated 2025-11-20 16:59:31 UTC by Sergei Osipov