



Professional Wealth Management Solutions for Muslims



ShariaPortfolio Canada offers wealth management solutions that are aligned with your values. To help clients achieve their life goals, we take a long-term perspective and a highly disciplined approach to wealth management, providing a full range of halal investment solutions.

Canada's first and only licensed Portfolio Management firm fully dedicated to Sharia-compliant investing.

HOW DOES SHARIA-COMPLIANT INVESTING WORK?

ShariaPortfolio manages all portfolios in accordance with the rules determined by the Accounting and Auditing Organization for Islamic Financial Institutions (AAOIFI). Our investment choices are Sharia compliant, or halal, which means they are permissible under Islamic guidelines.

To be Sharia-compliant, companies and investments must pass several screens for permissible asset classes and business activities. Stocks and Islamic ETFs are eligible for Sharia-compliance consideration but preferred shares and interest-paying securities are not. A business activities screen excludes companies that derive more than five percent of their total income from non-compliant income sources.

NON-COMPLIANT INCOME SOURCES

- ✗ Tobacco
- ✗ Gambling
- ✗ Pork Products
- ✗ Adult Entertainment
- ✗ Weapons
- ✗ Music, Cinema or Broadcasting
- ✗ Highly Leverage Businesses
- ✗ Alcohol
- ✗ Interest-based Businesses

ACCOUNT TYPES

- ✔ Non-Registered Cash Accounts
- ✔ Tax Free Savings Account (TFSA)
- ✔ Registered Retirement Savings Plan (RRSP)
- ✔ Locked In Retirement Account (LIRA)
- ✔ Registered Retirement Income Fund (RIF)
- ✔ Registered Education Savings Plan (RESP)



Is your portfolio Sharia compliant?

Contact us to schedule your free consultation, and to learn how ShariaPortfolio can help achieve your investment goals.

YOU WANT TO BUILD A SECURE FINANCIAL FUTURE. BUT WHERE DO YOU START?

We have answers to your questions and we're ready to help you take the next step.



**ShariaPortfolio
ACCESS**

Our ACCESS service is for clients who need comprehensive wealth management services. A licensed financial advisor works with you to create a custom solution for accomplishing your financial goals.



**ShariaPortfolio
EXPRESS**

Our EXPRESS is designed for accounts starting with only \$1,000. It's a great way to begin your halal investing journey. This solution works well for clients who are starting off as investors with smaller portfolios.



**ShariaPortfolio
Institutional**

We offer institutional services for investment advisors who wish to partner with ShariaPortfolio in order to offer Sharia-compliant solutions to their clients. We also work with investment companies seeking experienced and successful Sharia-compliant investment advisors to manage their funds.

WHY SHARIAPORTFOLIO?



Value based

ShariaPortfolio Canada offers a disciplined approach to long-term investing, with a focus on value. We apply the same approach as our US Affiliate, ShariaPortfolio Inc, which has had years of experience managing client assets through a range of market cycles.



Fee only

As a registered Portfolio Management firm we can only charge management fees based on the size of the portfolio, and do not take commission from trades.



Fiduciaries

As fiduciaries, ShariaPortfolio Canada is obligated to serve in the best interest of investors.

Contact us to speak with a licensed representative about how we can put our experience and expertise to work for you.

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Visit ShariaPortfolio.ca to learn more.

ShariaPortfolio Canada Inc. is a Portfolio Manager registered in the Provinces of Ontario, Alberta and British Columbia. The information contained herein is for general information purposes only and is not intended to be a solicitation.

