Researching Shariah funds

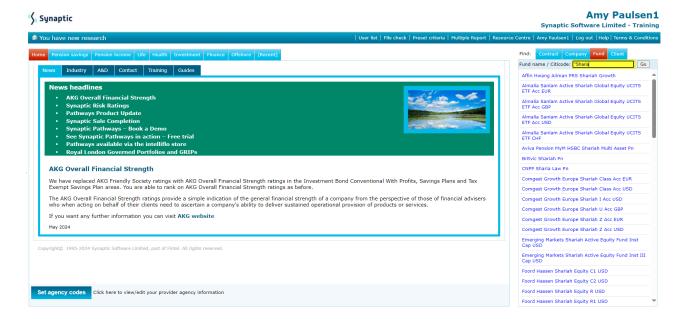
Last Modified on 24/05/2024 2:06 pm BST

For ethical funds, there is an ethical filter available when conducting research. This indicates that our fund data supplier has flagged this fund as ethical. Please also see Do you have Ethical funds on the system?

We don't have a specific feature filter for Shariah funds (only the ethical flag) from our fund data supplier.

Ways to locate Shariah funds are to:

1. Use the fund search on the right hand side of the home page. Put an asterisks in the fund search box followed by the word Sharia E.g. *Sharia. This will return a list of funds named as Sharia or Shariah from which you can click the link to view a fund fact sheet.



2. For comparison purposes rather than just an individual fact sheet, go to the Investment tab and select Manual fund list (under Fund data heading).

Synaptic

Amy Paulsen1

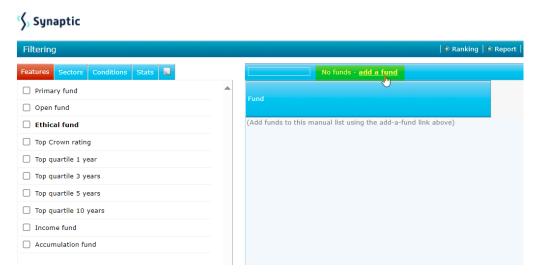
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A You have new research	User list File check Preset criteria Mult	iple Report Resourc	e Centre Amy Paulsen1 Log out Help Terms &	
Home Pension savings Pension income Life Health Investment Finance Offshore [Recent]			Find: Contract Company Fund Client	
Adviser Platforms			Fund name / Citicode: *Sharia	
Adviser Platforms	28 contracts 23	providers	Affin Hwang Aliman PRS Shariah Growth	
Child Trust Funds		,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	Almalia Sanlam Active Shariah Global Equity UC ETF Acc EUR	
Child Trust Funds	Personal presets 4	providers	Almalia Sanlam Active Sharlah Global Equity UC	
Fund data	Past performance data up to 30,	04/2024	ETF Acc GBP	
Investment trusts	6	38 funds	Almalia Sanlam Active Shariah Global Equity UC ETF Acc USD	
Unit trusts/OEICs	12,5	50 funds		
Life funds	8,3	81 funds	funds Almalia Sanlam Active Shariah Global Equity UC ETF CHF	
Pension funds	18,4	18,402 funds		
Offshore funds	107,328 funds		Aviva Pension MyM HSBC Shariah Multi Asset Pn	
IC sectors			Britvic Shariah Pn	
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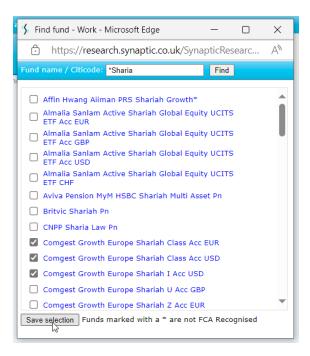
Select a client or skip client entry:

Synaptic				
Enter client data				
Client entry Skip client entry				
2	Client 1 Load		Client 2 (optional) Load	
First name:]
Last name:]
Date of birth:	(dd/mm/yyyy)		(dd/mm/yyyy)	
Sex:	Male 🗸		Female 🗸	
Smoker:	O Yes		O Yes	
	O No		O No	
Occupation:		Search		Search
Annual earnings:]
Start research				

From the features screen (middle section) click on 'add a fund'



In the fund name box use the same search function as above *Sharia to return all funds named as Sharia. You will need to tick the funds required (or all of them) and save selection.



This will list all those funds in a research grid for your to conduct fund research on as normal.

tic		Fund da Manual fund
g	€ Ranking € Report Change title Availability Portfol	io Save as PDF Delete Copy Send Not shared Help Terms & Cond
25 Sectors Conditions Stats	Showing 1 to 21 of 21 funds - add a fund	Factsheets Graph Optic
mary fund		
en fund	Fund	
ical fund	Comgest Growth Europe Shariah Class Acc EUR	
ical fund	Comgest Growth Europe Shariah Class Acc USD	
Crown rating	Comgest Growth Europe Shariah I Acc USD	
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	Comgest Growth Europe Shariah Z Acc EUR	
quartile 3 years	Foord Hassen Shariah Equity C1 USD	
quartile 5 years	Foord Hassen Shariah Equity C2 USD	
quartile 10 years	© Foord Hassen Shariah Equity R USD	
	Franklin Franklin Shariah Global Multi-Asset Income Fund W Acc GBP	
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	Manulife Shariah Progress	

We would recommend changing the title of the research (option in top ribbon) to something that will enable you to distinguish this manual fund list from others you create for future reference (otherwise they are all called manual fund list).

