

Wise Capital Management

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Investment Philosophy Value Style

Nimble: As a small firm, we can buy virtually any attractive stock for our clients, while larger firms cannot. This has added higher returns over several years.

Price all available securities: Our investment team is trained in fundamental analysis; we study every opportunity and employ proprietary computer analysis to give us an advantage.

Global capabilities: Our firm covers global securities, enhancing our fundamental knowledge and perspective over our peers.

Well diversified: We hold securities in almost every sector, and have performed well under almost all market conditions.

Long-term view: We have demonstrated our conviction to stay with ideas that have paid off over time.



Institutional Investors

Institutional investors can get the detailed information they require at the following services: [Pavilion](#), [eVestment](#), [Global Manager Research](#), [InvestmentMetrics](#), [Mercer GIMD](#)



Private Client Services

For wealthy families and holding companies investing at least \$1 million with us, we mutually determine an asset mix and appropriate diversification based on personally getting to know the client's investment objectives and risk tolerance. We review each client's objectives with them annually or, more frequently, if there is a life-changing event.



Equity Products

Our three investment strategies have delivered superior returns to our clients and provide excellent diversification when used in combination: Wise Capital All Cap Canadian Equity, Wise Capital Global Diversified Equity and Wise Capital Global Small Cap Equity. Please see our [Product](#) and [Track Record](#) pages for more information. [Contact us](#) for detailed information.

Contact Us

info@wisecapitalmanagement.com

103--90 Eglinton Ave W, Toronto, ON M4R 2E4

[for map and office hours, click here](#)

416-483-1900

