

# AOM

## iShares Core 40/60 Moderate Allocation ETF

### Analyst Report

This ETF is a one stop shop for investors seeking a moderate strategy that falls between its aggressive (AOA) and conservative (AOK) counterparts. It should be noted, however, that risk tolerance concepts and objectives vary from investor to investor, so using a "one size fits all" approach might not be advisable. AOM maximizes simplicity, but many investors will want to use other products to fine tune the risk/return portfolio this fund offers.

### ESG Themes and Scores

6.25/10

ESG Rate

43.3%

Global Percentile

41.87%

Peer Percentile

### Performance Data

	AOM	ETF Database Category Average	Factset Segment Average
1 Month	0.66%	1.24%	0.89%
3 Month	5.25%	7.21%	5.24%
YTD Return	6.92%	7.70%	4.95%
1 Year Return	8.47%	9.15%	6.29%
3 Year Return	7.36%	8.45%	3.99%
5 Year Return	4.89%	3.68%	2.52%

### Top 5 Holdings

Symbol	Holding	% Assets
IUSB	iShares Core Total USD Bond Market ETF	48.43%
IVV	iShares Core S&P 500 ETF	25.32%
IDEV	iShares Core MSCI International Developed Markets ETF	11.06%
IAGG	iShares Core International Aggregate Bond ETF	8.54%
IEMG	iShares Core MSCI Emerging Markets ETF	4.53%

### Vitals

Issuer	BlackRock, Inc.
Brand	iShares
Structure	ETF
Expense Ratio	0.15%
Inception	Nov 04, 2008
Index Tracked	S&P Target Risk Moderate

### ETF Database Themes

Category	Diversified Portfolio
Asset Class	Multi-Asset
Asset Class Size	Multi-Cap
Asset Class Style	Blend
Region (General)	Developed Markets
Region (Specific)	Broad

### FactSet Classifications

Segment	Asset Allocation: Global Target Risk
Category	Asset Allocation
Focus	Target Risk
Niche	Moderate
Strategy	Fixed Asset Allocation
Weighting	Fixed

