

AOR

iShares Core 60/40 Balanced Allocation ETF

Analyst Report

This ETF offers one stop exposure for investors seeking to implement a growth strategy, investing in a number of other ETFs to effectively function as an entire portfolio within one ticker. Given its growth focus, AOR is tilted towards equities, making it potentially appropriate for those with a higher risk tolerance and longer time horizon. While this ETF offers an extremely simplified option for building a portfolio, there are potential drawbacks as well. Because each investor's risk tolerance and objectives will differ, it's unlikely the profile maintained by AOR is exactly appropriate for many investors--some fine-tuning may be required. Moreover, layered fees can increase costs; constructing a similar portfolio on your own would save you money over the long run.

ESG Themes and Scores

6.44/10

ESG Rate

49.42%

Global Percentile

36.9%

Peer Percentile

Performance Data

	AOR	ETF Database Category Average	Factset Segment Average
1 Month	-3.15%	-2.74%	-2.59%
3 Month	-2.80%	-3.60%	-4.55%
YTD Return	-2.41%	-2.49%	-2.88%
1 Year Return	6.88%	5.92%	2.49%
3 Year Return	4.63%	2.56%	1.17%
5 Year Return	7.70%	3.48%	1.95%

Top 5 Holdings

Symbol	Holding	% Assets
IUSB	iShares Core Total USD Bond Market ETF	35.16%
IVV	iShares Core S&P 500 ETF	32.23%
IDEV	iShares Core MSCI International Developed Markets ETF	17.41%
IEMG	iShares Core MSCI Emerging Markets ETF	6.29%
IAGG	iShares Core International Aggregate Bond ETF	6.13%

Vitals

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

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 Outcome
Category	Asset Allocation
Focus	Target Outcome
Niche	Income & Capital Appreciation
Strategy	Fixed Asset Allocation
Weighting	Fixed

