

CARU

MAX Auto Industry 3X Leveraged ETN

Analyst Report

CARU is an exchange-traded note that tracks 3x the daily price movements of an index consisting of US-listed companies in the broader auto industry ecosystem. The index selects equities by market-cap and weights the resulting portfolio by liquidity.

ESG Themes and Scores

N/A

ESG Rate

N/A

Global Percentile

N/A

Peer Percentile

Performance Data

	CARU	ETF Database Category Average	Factset Segment Average
1 Month	-2.25%	-6.69%	-8.03%
3 Month	15.98%	22.90%	-3.51%
YTD Return	-21.30%	8.41%	-24.86%
1 Year Return	-14.81%	31.69%	0.33%
3 Year Return	-5.40%	14.96%	-0.28%
5 Year Return	N/A	2.55%	0.00%

Top 5 Holdings

No Holdings Data Available

Vitals

Issuer	BMO Financial Group
Brand	Max
Structure	ETN
Expense Ratio	0.95%
Inception	Jun 27, 2023
Index Tracked	Prime Auto Industry Index - Benchmark TR Net (-300%)

ETF Database Themes

Category	Leveraged Equities
Asset Class	Equity
Asset Class Size	Multi-Cap
Asset Class Style	N/A
Region (General)	North America
Region (Specific)	U.S.

FactSet Classifications

Segment	Leveraged Equity: U.S. Automobile Manufacturers
Category	Sector
Focus	Consumer Discretionary
Niche	Automobile Manufacturers
Strategy	Vanilla
Weighting	Liquidity

