

# EAOR

## iShares ESG Aware 60/40 Balanced Allocation ETF Analyst Report

EAOR is an index-tracking fund-of-funds that provides moderately aggressive risk exposure to global stocks and bonds with positive ESG characteristics.

### ESG Themes and Scores

7.19/10

ESG Rate

78.12%

Global Percentile

97.88%

Peer Percentile

### Performance Data

	EAOR	ETF Database Category Average	Factset Segment Average
1 Month	1.29%	2.23%	0.90%
3 Month	2.86%	1.65%	1.32%
YTD Return	1.05%	2.26%	1.20%
1 Year Return	16.63%	15.22%	8.81%
3 Year Return	13.26%	12.54%	5.05%
5 Year Return	6.25%	3.35%	1.42%

### Top 5 Holdings

Symbol	Holding	% Assets
EAGG	iShares ESG Aware US Aggregate Bond ETF	39.19%
ESGU	iShares ESG Aware MSCI USA ETF	37.68%
ESGD	iShares ESG Aware MSCI EAFE ETF	12.75%
ESGE	iShares ESG Aware MSCI EM ETF	6.45%
ESML	iShares ESG Aware MSCI USA Small-Cap ETF	3.83%

### Vitals

Issuer	BlackRock, Inc.
Brand	iShares
Structure	ETF
Expense Ratio	0.18%
Inception	Jun 12, 2020
Index Tracked	BlackRock ESG Aware Balanced Allocation

### 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	ESG
Weighting	Fixed

