

HDUS

Hartford Disciplined US Equity ETF

Analyst Report

HDUS is passively managed to invest in a broad portfolio of US large-cap stocks that target balanced exposures across value, momentum, and quality factors at lower volatility level, while controlling overall active risk factors.

ESG Themes and Scores

6.41/10

ESG Rate

47.7%

Global Percentile

34.84%

Peer Percentile

Performance Data

	HDUS	ETF Database Category Average	Factset Segment Average
1 Month	-7.11%	-5.06%	-4.31%
3 Month	-6.54%	-4.00%	-3.32%
YTD Return	-3.60%	-1.15%	-1.76%
1 Year Return	11.01%	7.73%	4.96%
3 Year Return	N/A	6.44%	4.05%
5 Year Return	N/A	7.46%	3.67%

Top 5 Holdings

Symbol	Holding	% Assets
MSFT	Microsoft Corporation	5.19%
AAPL	Apple Inc.	5.13%
NVDA	NVIDIA Corporation	5.08%
GOOGL	Alphabet Inc. Class A	3.99%
AMZN	Amazon.com, Inc.	3.54%

Vitals

Issuer	The Hartford
Brand	Hartford
Structure	ETF
Expense Ratio	0.19%
Inception	Nov 17, 2022
Index Tracked	Hartford Disciplined US Equity Index - Benchmark TR Gross

ETF Database Themes

Category	Large Cap Blend Equities
Asset Class	Equity
Asset Class Size	Large-Cap
Asset Class Style	Blend
Region (General)	North America
Region (Specific)	U.S.

FactSet Classifications

Segment	Equity: U.S. - Large Cap
Category	Size and Style
Focus	Large Cap
Niche	Broad-based
Strategy	Multi-factor
Weighting	Multi-Factor

