

# HEAT

## Touchstone Climate Transition ETF

### Analyst Report

HEAT is an actively managed fund that invests in equity and equity-related securities of three categories tied to climate transition: solution providers, transition leaders, and adaption opportunities.

### ESG Themes and Scores

7.36/10

ESG Rate

84.19%

Global Percentile

95.86%

Peer Percentile

### Performance Data

	HEAT	ETF Database Category Average	Factset Segment Average
1 Month	-0.79%	0.28%	-0.02%
3 Month	2.51%	3.29%	2.89%
YTD Return	0.16%	5.32%	-0.70%
1 Year Return	-6.21%	7.79%	-4.12%
3 Year Return	N/A	-0.41%	-3.31%
5 Year Return	N/A	2.37%	0.94%

### Top 5 Holdings

Symbol	Holding	% Assets
NVDA	NVIDIA Corporation	3.78%
NEE	NextEra Energy, Inc.	3.60%
TSM	Taiwan Semiconductor Manufacturing Co., Ltd. Sponsored	2.97%
Other	U.S. Dollar	2.83%
URI	United Rentals, Inc.	2.55%

### Vitals

Issuer	Western & Southern Mutual Holding Co.
Brand	Touchstone
Structure	ETF
Expense Ratio	0.69%
Inception	May 02, 2023
Index Tracked	N/A

### ETF Database Themes

Category	Global Equities
Asset Class	Equity
Asset Class Size	Large-Cap
Asset Class Style	N/A
Region (General)	Global
Region (Specific)	Broad

### FactSet Classifications

Segment	Equity: Global Environment
Category	Sector
Focus	Theme
Niche	Environment
Strategy	Active
Weighting	Proprietary

