

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

7.5/10

ESG Rate

86.6%

Global Percentile

98.37%

Peer Percentile

Performance Data

	HEAT	ETF Database Category Average	Factset Segment Average
1 Month	1.57%	3.15%	0.52%
3 Month	2.18%	2.35%	1.06%
YTD Return	20.60%	22.51%	10.72%
1 Year Return	19.67%	23.05%	10.48%
3 Year Return	N/A	13.50%	0.47%
5 Year Return	N/A	3.81%	-0.39%

Top 5 Holdings

No Holdings Data Available

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