



# iShares Core S&P Mid-Cap ETF

## Analyst Report

This ETF is one of several ETFs available that offers exposure to mid cap U.S. stocks, an asset class that can make up a significant portion of long-term, buy-and-hold portfolios. As such, this ETF may be more appealing to those in the portfolio construction process as opposed to short term traders. IJH offers exposure to a balanced portfolio of stocks, including close to 400 individual names and spreading exposure relatively evenly. The expense ratio is competitive with the other options out there; in addition to cap-weighted choices such as this fund and MDY, there is the alpha-seeking FNX, ultra-cheap FMM, and equal-weighted EWRM.

## ESG Themes and Scores

6.11/10

ESG Rate

38.34%

Global Percentile

59.31%

Peer Percentile

## Performance Data

	IJH	ETF Database Category Average	Factset Segment Average
1 Month	-1.82%	-0.94%	-0.92%
3 Month	-0.84%	-0.52%	-0.77%
YTD Return	1.94%	3.20%	2.06%
1 Year Return	14.67%	16.78%	11.51%
3 Year Return	8.05%	8.26%	5.64%
5 Year Return	10.23%	7.27%	4.99%

## Top 5 Holdings

Symbol	Holding	% Assets
WSM	Williams-Sonoma, Inc.	0.92%
IBKR	Interactive Brokers Group, Inc. Class A	0.85%
EXE	Expand Energy Corporation	0.77%
PSTG	Pure Storage, Inc. Class A	0.73%
EME	EMCOR Group, Inc.	0.68%

## Vitals

Issuer	BlackRock, Inc.
Brand	iShares
Structure	ETF
Expense Ratio	0.05%
Inception	May 22, 2000
Index Tracked	S&P MidCap 400 Index

## ETF Database Themes

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

## FactSet Classifications

Segment	Equity: U.S. - Mid Cap
Category	Size and Style
Focus	Mid Cap
Niche	Broad-based
Strategy	Vanilla
Weighting	Market Cap

