

# IJR

## iShares Core S&P Small-Cap ETF

### Analyst Report

This ETF is linked to an index which tracks the performance of small cap U.S. stocks. The investment thesis behind a small cap investment is the growth factor that comes along with these securities. While mega cap firms have already hit their peak, many of these companies may be well on their way to becoming the next large cap, and this product gives investors access to over 600 of them. The downside to small cap investing is that these companies carry a fair amount of risk; because they are so small, the slightest change in regulations or anything specific to an individual company could send share prices plummeting. While some exposure to these small companies is healthy for a portfolio, the allocation should be kept low as this ETF will likely exhibit a high amount of volatility as well as being incredibly risky. IJR tends to spread its investments across several market sectors, though it slightly favors the technology and industrial segments. This fund will make for a good investment for traders looking for growth and are aware of the risks that come along with investing in a small cap ETF.

### ESG Themes and Scores

5.66/10

ESG Rate

30.86%

Global Percentile

27.93%

Peer Percentile

### Performance Data

	IJR	ETF Database Category Average	Factset Segment Average
1 Month	3.98%	3.74%	3.19%
3 Month	8.58%	8.09%	6.35%
YTD Return	6.56%	8.09%	5.31%
1 Year Return	22.96%	20.19%	13.04%
3 Year Return	2.35%	0.95%	1.72%
5 Year Return	10.32%	6.00%	4.06%

### Top 5 Holdings

Symbol	Holding	% Assets
Other	U.S. Dollar	1.78%
MLI	Mueller Industries, Inc.	0.61%
CRS	Carpenter Technology Corporation	0.61%
ATI	ATI Inc.	0.59%
CMA	Comerica Incorporated	0.59%

### Vitals

Issuer	BlackRock, Inc.
Brand	iShares
Structure	ETF
Expense Ratio	0.06%
Inception	May 22, 2000
Index Tracked	S&P SmallCap 600 Index

### ETF Database Themes

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

### FactSet Classifications

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

