

INFO

Harbor PanAgora Dynamic Large Cap Core ETF Analyst Report

INFO is actively managed, seeking long-term total returns through investments in large-cap US stocks. The portfolio is maintained using a proprietary alpha modeling framework and optimization technique.

ESG Themes and Scores

6.4/10

ESG Rate

43.6%

Global Percentile

32.94%

Peer Percentile

Performance Data

	INFO	ETF Database Category Average	Factset Segment Average
1 Month	-1.38%	-4.26%	-0.59%
3 Month	14.07%	8.11%	11.29%
YTD Return	10.34%	4.69%	8.85%
1 Year Return	23.59%	10.02%	14.61%
3 Year Return	N/A	0.95%	8.98%
5 Year Return	N/A	0.11%	4.28%

Top 5 Holdings

Symbol	Holding	% Assets
NVDA	NVIDIA Corporation	7.91%
AAPL	Apple Inc.	7.75%
GOOGL	Alphabet Inc. Class A	6.54%
MSFT	Microsoft Corporation	4.58%
AMZN	Amazon.com, Inc.	3.15%

Vitals

Issuer	ORIX
Brand	Harbor
Structure	N/A
Expense Ratio	0.35%
Inception	Oct 08, 2024
Index Tracked	N/A

ETF Database Themes

Category	N/A
Asset Class	Equity
Asset Class Size	N/A
Asset Class Style	N/A

FactSet Classifications

Segment	Equity: U.S. - Large Cap
Category	Size and Style
Focus	Large Cap
Niche	Broad-based
Strategy	Active
Weighting	Proprietary

