

IQSU

IQ Candriam ESG U.S. Large Cap Equity ETF

Analyst Report

IQSU tracks a proprietary index of large-cap US stocks selected by ESG criteria and weighted by market capitalization.

ESG Themes and Scores

6.94/10

ESG Rate

69.19%

Global Percentile

83.12%

Peer Percentile

Performance Data

	IQSU	ETF Database Category Average	Factset Segment Average
1 Month	4.90%	4.51%	2.73%
3 Month	3.22%	1.91%	0.96%
YTD Return	25.47%	20.62%	9.33%
1 Year Return	20.10%	16.20%	7.71%
3 Year Return	10.55%	5.11%	3.63%
5 Year Return	N/A	7.19%	2.58%

Top 5 Holdings

Symbol	Holding	% Assets
MSFT	Microsoft Corporation	10.03%
AAPL	Apple Inc.	10.01%
AMZN	Amazon.com, Inc.	4.68%
NVDA	NVIDIA Corporation	4.27%
GOOGL	Alphabet Inc. Class A	2.96%

Vitals

Issuer	New York Life
Brand	IndexIQ
Structure	ETF
Expense Ratio	0.09%
Inception	Dec 17, 2019
Index Tracked	IQ Candriam ESG US Equity Index

ETF Database Themes

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

FactSet Classifications

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

