

IWB

iShares Russell 1000 ETF

Analyst Report

This ETF tracks the Russell 1000 Index, a benchmark consisting of some of America's largest companies. As a result, investors should think of this as a play on mega and large cap stocks in the American market. These securities are usually known as 'Blue Chips' and are some of the most famous and profitable companies in the country, including well known names such as ExxonMobil, Apple, IBM, and GE. The fund is probably one of the safest in the equity world as the companies on this list are very unlikely to go under unless there is an apocalyptic event in the economy. However, these securities are unlikely to grow very much either as they are already pretty large and have probably seen their quickest growing days in years past, but most do pay out solid dividends which should help to ease the pain of this realization. Overall, IWB is a quality choice for investors seeking broad mega and large cap exposure and it is more diversified than most, containing just under 1,000 securities in total. As a result, this fund could serve as a building block for many portfolios making it an excellent choice for many buy and holders.

ESG Themes and Scores

6.48/10

ESG Rate

48.93%

Global Percentile

24.42%

Peer Percentile

Performance Data

	IWB	ETF Database Category Average	Factset Segment Average
1 Month	1.94%	2.91%	1.39%
3 Month	3.62%	4.94%	2.41%
YTD Return	4.22%	5.26%	2.75%
1 Year Return	24.16%	24.92%	10.85%
3 Year Return	13.27%	11.58%	4.64%
5 Year Return	13.88%	9.93%	2.83%

Top 5 Holdings

Symbol	Holding	% Assets
AAPL	Apple Inc.	6.25%
NVDA	NVIDIA Corporation	5.83%
MSFT	Microsoft Corporation	5.50%
AMZN	Amazon.com, Inc.	3.72%
META	Meta Platforms Inc Class A	2.71%

Vitals

Issuer	BlackRock, Inc.
Brand	iShares
Structure	ETF
Expense Ratio	0.15%
Inception	May 15, 2000
Index Tracked	Russell 1000 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	Vanilla
Weighting	Market Cap

