

IWR

iShares Russell Midcap 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. Mid cap stocks are appealing to many because they still have significant growth potential but they are less risky than their small and micro cap brethren. IWR offers exposure to a balanced portfolio of stocks, including close to 780 individual names, among the most in this particular Category. The expense ratio is pretty cheap, although there are several funds that do offer a lower cost. For those seeking other options in the space similar choices can be found in the MDY and IJH funds, the ultra-cheap FMM, and equal-weighted EWRM.

ESG Themes and Scores

6.58/10

ESG Rate

52.73%

Global Percentile

85.35%

Peer Percentile

Performance Data

	IWR	ETF Database Category Average	Factset Segment Average
1 Month	0.32%	-0.72%	-0.92%
3 Month	0.50%	-0.82%	-0.77%
YTD Return	3.95%	2.63%	2.06%
1 Year Return	18.01%	15.35%	11.51%
3 Year Return	8.34%	7.18%	5.64%
5 Year Return	9.79%	6.02%	4.99%

Top 5 Holdings

Symbol	Holding	% Assets
PLTR	Palantir Technologies Inc. Class A	1.75%
APP	AppLovin Corp. Class A	0.97%
AJG	Arthur J. Gallagher & Co.	0.65%
WMB	Williams Companies, Inc.	0.58%
BK	Bank of New York Mellon Corp	0.53%

Vitals

Issuer	BlackRock, Inc.
Brand	iShares
Structure	ETF
Expense Ratio	0.19%
Inception	Jul 17, 2001
Index Tracked	Russell Midcap Index

ETF Database Themes

Category	Mid Cap Blend Equities
Asset Class	Equity
Asset Class Size	Mid-Cap
Asset Class Style	Blend
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

