

IWY

iShares Russell Top 200 Growth ETF

Analyst Report

This ETF is linked to the Russell Top 200 Growth Index, which offers exposure to large-cap companies within the growth sector of the U.S. equity market. Investors with a longer-term horizon ought to consider the importance of growth stocks and the diversification benefits they can add to any well-balanced portfolio. Companies within the growth segment offer tremendous profit potential since they are still in the early stages of their life cycle, which in turn also raises the risk level associated with this asset class. Growth stocks may also appeal to those seeking capital appreciation versus dividend income, as these companies re-invest earnings. IWY is linked to an index consisting of roughly 130 holdings and exposure is tilted most heavily towards technology, while industrials, energy, and consumer goods receive equal weightings. Viable alternatives with comparable holdings include SPYG and RPG, while SCHG is the cheapest option.

ESG Themes and Scores

6.57/10

ESG Rate

52.35%

Global Percentile

41.34%

Peer Percentile

Performance Data

	IWY	ETF Database Category Average	Factset Segment Average
1 Month	1.84%	2.91%	1.89%
3 Month	5.60%	4.94%	4.57%
YTD Return	2.65%	5.26%	3.87%
1 Year Return	30.10%	24.92%	20.00%
3 Year Return	17.84%	11.58%	6.23%
5 Year Return	18.71%	9.93%	4.46%

Top 5 Holdings

Symbol	Holding	% Assets
AAPL	Apple Inc.	12.99%
NVDA	NVIDIA Corporation	12.11%
MSFT	Microsoft Corporation	11.43%
AMZN	Amazon.com, Inc.	7.72%
META	Meta Platforms Inc Class A	5.62%

Vitals

Issuer	BlackRock, Inc.
Brand	iShares
Structure	ETF
Expense Ratio	0.20%
Inception	Sep 22, 2009
Index Tracked	Russell Top 200 Growth Index

ETF Database Themes

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

FactSet Classifications

Segment	Equity: U.S. - Large Cap Growth
Category	Size and Style
Focus	Large Cap
Niche	Growth
Strategy	Growth
Weighting	Multi-Factor

