

# LCAP

## Principal Capital Appreciation Select ETF

### Analyst Report

LCAP is an actively managed fund of US companies of any size, but tilts to large-cap stocks. It seeks long-term capital growth.

### ESG Themes and Scores

6.51/10

ESG Rate

48.69%

Global Percentile

59.4%

Peer Percentile

### Performance Data

	LCAP	ETF Database Category Average	Factset Segment Average
1 Month	-0.28%	-1.02%	1.27%
3 Month	8.35%	7.31%	8.03%
YTD Return	9.78%	5.63%	8.17%
1 Year Return	23.89%	13.11%	15.75%
3 Year Return	N/A	1.25%	9.70%
5 Year Return	N/A	0.12%	4.42%

### Top 5 Holdings

Symbol	Holding	% Assets
NVDA	NVIDIA Corporation	7.44%
AAPL	Apple Inc.	6.19%
GOOGL	Alphabet Inc. Class A	5.55%
MSFT	Microsoft Corporation	4.37%
GVMXX	State Street Institutional Investment Trust US	4.31%

### Vitals

Issuer	Principal
Brand	Principal
Structure	N/A
Expense Ratio	0.29%
Inception	Mar 25, 2025
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. - Total Market
Category	Size and Style
Focus	Total Market
Niche	Broad-based
Strategy	Active
Weighting	Proprietary

