

SDVY

First Trust SMID Cap Rising Dividend Achievers ETF Analyst Report

SDVY tracks an equal-weighted index of small- and mid-cap US companies with historically increasing dividends and that meet various fundamental criteria.

ESG Themes and Scores

5.86/10

ESG Rate

29.77%

Global Percentile

3.32%

Peer Percentile

Performance Data

	SDVY	ETF Database Category Average	Factset Segment Average
1 Month	3.56%	4.07%	3.67%
3 Month	8.65%	13.60%	12.88%
YTD Return	12.53%	14.73%	14.54%
1 Year Return	25.11%	29.98%	20.92%
3 Year Return	18.38%	10.29%	7.22%
5 Year Return	10.08%	2.83%	1.98%

Top 5 Holdings

Symbol	Holding	% Assets
FIX	Comfort Systems USA, Inc.	1.24%
ENS	EnerSys	1.21%
NHC	National HealthCare Corporation	1.15%
PSMT	PriceSmart, Inc.	1.15%
WWD	Woodward, Inc.	1.14%

Vitals

Issuer	First Trust
Brand	First Trust
Structure	ETF
Expense Ratio	0.59%
Inception	Nov 01, 2017
Index Tracked	NASDAQ US Small Mid Cap Rising Dividend Achievers™ Index

ETF Database Themes

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

FactSet Classifications

Segment	Equity: U.S. - Extended Market
Category	Size and Style
Focus	Extended Market
Niche	Broad-based
Strategy	Fundamental
Weighting	Equal

