

# SHDG

## Soundwatch Hedged Equity ETF

### Analyst Report

SHDG is an actively managed, fund-of-funds which seeks to hedge downside US equity market risk and long-term capital appreciation. The fund combines equity exposure with several strategies using derivatives to hedge or generate income.

### ESG Themes and Scores

6.42/10

ESG Rate

44.91%

Global Percentile

43.06%

Peer Percentile

### Performance Data

	SHDG	ETF Database Category Average	Factset Segment Average
1 Month	1.25%	3.67%	4.56%
3 Month	0.94%	11.42%	9.24%
YTD Return	0.89%	8.12%	9.87%
1 Year Return	11.73%	16.41%	19.15%
3 Year Return	12.49%	1.33%	9.76%
5 Year Return	N/A	0.15%	4.45%

### Top 5 Holdings

No Holdings Data Available

### Vitals

Issuer	Soundwatch Capital LLC
Brand	SoundWatch Capital
Structure	N/A
Expense Ratio	0.91%
Inception	Oct 24, 2022
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. - Large Cap
Category	Size and Style
Focus	Large Cap
Niche	Broad-based
Strategy	Active
Weighting	Proprietary

