

SPBC

Simplify US Equity PLUS Bitcoin Strategy ETF Analyst Report

SPBC is actively managed to invest in US equities and spot Bitcoin ETPs. The fund seeks long-term capital appreciation.

ESG Themes and Scores

6.43/10

ESG Rate

45.37%

Global Percentile

46.03%

Peer Percentile

Performance Data

	SPBC	ETF Database Category Average	Factset Segment Average
1 Month	-3.85%	-1.73%	-1.32%
3 Month	10.65%	7.15%	3.49%
YTD Return	3.77%	5.70%	3.96%
1 Year Return	14.56%	14.41%	9.17%
3 Year Return	24.99%	7.60%	4.46%
5 Year Return	15.03%	2.26%	1.35%

Top 5 Holdings

No Holdings Data Available

Vitals

Issuer	Simplify
Brand	Simplify
Structure	ETF
Expense Ratio	0.50%
Inception	May 24, 2021
Index Tracked	N/A

ETF Database Themes

Category	Diversified Portfolio
Asset Class	Multi-Asset
Asset Class Size	N/A
Asset Class Style	N/A
Region (General)	North America
Region (Specific)	U.S.

FactSet Classifications

Segment	Asset Allocation: Global Target Outcome
Category	Asset Allocation
Focus	Target Outcome
Niche	Capital Appreciation
Strategy	Active
Weighting	Proprietary

