

SPD

Simplify US Equity PLUS Downside Convexity ETF Analyst Report

SPD is an actively managed fund-of-funds that provides exposure to US large-cap stocks while applying a downside options overlay strategy.

ESG Themes and Scores

6.42/10

ESG Rate

44.28%

Global Percentile

77.33%

Peer Percentile

Performance Data

	SPD	ETF Database Category Average	Factset Segment Average
1 Month	5.52%	3.97%	4.69%
3 Month	8.27%	5.81%	7.48%
YTD Return	6.86%	9.83%	9.14%
1 Year Return	15.76%	24.33%	19.73%
3 Year Return	18.59%	14.61%	9.97%
5 Year Return	8.55%	6.20%	4.40%

Top 5 Holdings

No Holdings Data Available

Vitals

Issuer	Simplify
Brand	Simplify
Structure	ETF
Expense Ratio	0.53%
Inception	Sep 03, 2020
Index Tracked	N/A

ETF Database Themes

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

FactSet Classifications

Segment	Equity: U.S. - Large Cap
Category	Size and Style
Focus	Large Cap
Niche	Broad-based
Strategy	Active
Weighting	Proprietary

