

SPUC

Simplify US Equity PLUS Upside Convexity ETF Analyst Report

SPUC is actively managed to provide exposure to the S&P 500 stocks while applying an upside options overlay strategy.

ESG Themes and Scores

6.42/10

ESG Rate

44.19%

Global Percentile

75.16%

Peer Percentile

Performance Data

	SPUC	ETF Database Category Average	Factset Segment Average
1 Month	5.16%	3.97%	4.69%
3 Month	9.19%	5.81%	7.48%
YTD Return	9.17%	9.83%	9.14%
1 Year Return	32.46%	24.33%	19.73%
3 Year Return	25.13%	14.61%	9.97%
5 Year Return	13.88%	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

