

# 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

48.76%

Global Percentile

71.39%

Peer Percentile

### Performance Data

	SPUC	ETF Database Category Average	Factset Segment Average
1 Month	18.68%	7.27%	5.42%
3 Month	-2.26%	-2.15%	-1.58%
YTD Return	3.17%	1.81%	0.75%
1 Year Return	9.75%	8.18%	5.61%
3 Year Return	15.50%	8.13%	4.88%
5 Year Return	N/A	7.34%	3.55%

### 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

