

# SPYU

## MAX S&P 500 4X Leveraged ETN

### Analyst Report

SPYU is passively managed, tracking 4x the daily performance of a total return index comprised of US large-cap companies.

### ESG Themes and Scores

N/A

ESG Rate

N/A

Global Percentile

N/A

Peer Percentile

### Performance Data

|               | SPYU   | ETF Database Category Average | Factset Segment Average |
|---------------|--------|-------------------------------|-------------------------|
| 1 Month       | -9.61% | -6.69%                        | -3.90%                  |
| 3 Month       | 53.24% | 22.90%                        | 24.87%                  |
| YTD Return    | 19.77% | 8.41%                         | 13.55%                  |
| 1 Year Return | 49.75% | 31.69%                        | 28.48%                  |
| 3 Year Return | N/A    | 14.96%                        | 11.37%                  |
| 5 Year Return | N/A    | 2.55%                         | 4.84%                   |

### Top 5 Holdings

No Holdings Data Available

### Vitals

|               |                     |
|---------------|---------------------|
| Issuer        | BMO Financial Group |
| Brand         | Max                 |
| Structure     | ETN                 |
| Expense Ratio | 2.95%               |
| Inception     | Dec 05, 2023        |
| Index Tracked | S&P 500 (400%)      |

### ETF Database Themes

|                   |                    |
|-------------------|--------------------|
| Category          | Leveraged 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   | Leveraged Equity: U.S. - Large Cap |
| Category  | Size and Style                     |
| Focus     | Large Cap                          |
| Niche     | Broad-based                        |
| Strategy  | Vanilla                            |
| Weighting | Market Cap                         |

