

UPWD

JPMorgan Social Advancement ETF

Analyst Report

UPWD is actively managed and seeks to invest in companies from around the world that facilitate social and economic advancements and are positioned to benefit from those changes.

ESG Themes and Scores

7.44/10

ESG Rate

85.76%

Global Percentile

87.97%

Peer Percentile

Performance Data

	UPWD	ETF Database Category Average	Factset Segment Average
1 Month	-3.77%	-6.03%	-6.35%
3 Month	-10.27%	-11.83%	-15.92%
YTD Return	2.54%	-0.26%	3.74%
1 Year Return	8.10%	3.39%	1.29%
3 Year Return	N/A	-0.27%	-1.92%
5 Year Return	N/A	1.32%	0.16%

Top 5 Holdings

Symbol	Holding	% Assets
MSFT	Microsoft Corporation	8.16%
REL	RELX PLC	3.93%
UNH	UnitedHealth Group Incorporated	3.69%
NOVO.B	Novo Nordisk A/S Class B	3.39%
GOOGL	Alphabet Inc. Class A	3.18%

Vitals

Issuer	JPMorgan Chase
Brand	JPMorgan
Structure	ETF
Expense Ratio	0.49%
Inception	Sep 07, 2022
Index Tracked	N/A

ETF Database Themes

Category	Global Equities
Asset Class	Equity
Asset Class Size	Multi-Cap
Asset Class Style	N/A
Region (General)	Global
Region (Specific)	Broad

FactSet Classifications

Segment	Equity: Global Broad Thematic
Category	Sector
Focus	Theme
Niche	Broad Thematic
Strategy	Active
Weighting	Proprietary