

VO

Vanguard Mid-Cap ETF

Analyst Report

This ETF is one of several ETFs available that offers exposure to mid cap U.S. stocks, an asset class that can make up a significant portion of long-term, buy-and-hold portfolios. As such, this ETF may be more appealing to those in the portfolio construction process as opposed to short term traders. Mid cap stocks are appealing to many because they still have significant growth potential but they are less risky than their small and micro cap brethren. VO offers exposure to a balanced portfolio of stocks, including close to 460 individual names and spreading exposure relatively evenly. The expense ratio is among the cheapest in the category making it an excellent choice for those looking to keep costs to an absolute minimum. For those seeking other options in the space similar choices can be found in the MDY and IJH funds, the ultra-cheap FMM, and equal-weighted EWRM.

ESG Themes and Scores

6.96/10

ESG Rate

67.93%

Global Percentile

96.84%

Peer Percentile

Performance Data

	VO	ETF Database Category Average	Factset Segment Average
1 Month	3.24%	3.76%	3.41%
3 Month	11.46%	13.80%	11.39%
YTD Return	11.20%	13.89%	12.77%
1 Year Return	18.35%	21.92%	20.34%
3 Year Return	16.56%	16.44%	12.26%
5 Year Return	7.88%	7.09%	6.01%

Top 5 Holdings

Symbol	Holding	% Assets
STX	Seagate Technology Holdings PLC	1.90%
WDC	Western Digital Corporation	1.78%
VRT	Vertiv Holdings Co. Class A	1.17%
PWR	Quanta Services, Inc.	1.05%
HWM	Howmet Aerospace Inc.	1.02%

Vitals

Issuer	Vanguard
Brand	Vanguard
Structure	ETF
Expense Ratio	0.03%
Inception	Jan 26, 2004
Index Tracked	CRSP US Mid Cap

ETF Database Themes

Category	Mid Cap Growth Equities
Asset Class	Equity
Asset Class Size	Mid-Cap
Asset Class Style	Blend
Region (General)	North America
Region (Specific)	U.S.

FactSet Classifications

Segment	Equity: U.S. - Mid Cap
Category	Size and Style
Focus	Mid Cap
Niche	Broad-based
Strategy	Vanilla
Weighting Scheme	Market Cap

