

ACIO

Aptus Collared Investment Opportunity ETF

Fund Description

ACIO is an actively-managed portfolio of US large cap equities as well as corresponding options collars for those constituents.

FactSet Analyst Report

ACIO has the unique strategy of attaching an options collar to its constituents. An options collar is the combination of selling a call and buying a put to limit both downside risk and upside gains from capital appreciation. The stocks themselves are selected based on the advisers assessment of the likelihood that the dividends paid by the issuer will increase or remain stable and based on the liquidity of the options available for such security. In assessing this, the factors primarily used are related to yield, earnings growth, revenue growth, and distribution history. Prior to Mar. 31, 2023, the fund was called Aptus Collared Income Opportunity ETF.



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