

AESR

Anfield U.S. Equity Sector Rotation ETF

Fund Description

AESR is an actively managed fund-of-funds of large-cap US equities that uses macroeconomic and forecasting methodology to pursue a sector rotation strategy.

FactSet Analyst Report

AESR is an actively managed fund-of-funds of large-cap US equities that aims to outperform traditional large-cap equity indices by using sector rotation. The core of the funds portfolio will be comprised of 11 main industry sectors that make up the S&P 500 Index. AESR expects to hold between eight to ten ETFs with over- and under-weights of industry sectors determined by market conditions. The Advisor uses a tactical investment style employing a proprietary analysis of fundamental, business cycle, and technical factors to determine the portfolio of ETFs, making periodic shifts to capitalize on market opportunities or avoid market declines. AESR is generally rebalanced and adjusted on a quarterly basis. The Fund may also invest in derivatives, including exchange listed and OTC futures.