

AVLV

Avantis U.S. Large Cap Value ETF

Fund Description

AVLV is an actively-managed portfolio of US large-cap value companies selected based on fundamental criteria.

FactSet Analyst Report

AVLV seeks long-term capital appreciation by targeting US large-cap value stocks that are highly profitable, as defined by the fund manager, across market sectors and industry groups. The funds portfolio is curated using fundamental screens, such as shares outstanding, cash flow, revenue, expenses and price-to-book value. AVLVs portfolio manager aims to achieve the benefits correlated with indexing including diversification, low turnover, and transparency of exposure, but with the ability to add value by implementing an active investment strategy with current prices as the basis and the Russell 1000 Value Index as a benchmark. In an attempt to gain trading efficiencies and avoid risk, trade-offs between expected returns and taxes or trade costs may also be considered. AVLV aims to capture the US large-cap space to complement sibling fund AVUV, which on the other hand focuses on US small-caps.