

AVTM

Avantis Total Equity Markets ETF

Fund Description

AVTM provides primary broad exposure to the US equity space, targeting securities with higher returns or better risk characteristics than a passive index. It is an actively managed fund that may also hold, in limited amounts, non-US securities focusing on developed countries.

FactSet Analyst Report

AVTM is an actively managed fund investing in equity securities and ETFs, forming a diversified basket of equity holdings. It focuses on securities that aim to offer better risk-adjusted returns than a passive index. At least 80% of assets are invested in stocks of US companies. Minimal non-US exposure includes developed and emerging markets, with an emphasis on developed countries. Due to its active management, portfolio managers are to analyze market data to make buy, sell, and hold decisions, considering implementation costs, tax consequences, and trading efficiencies. Regular rebalancing is used to balance risks, manage costs, and minimize tax impacts in changing market environments.