

BAMV

Brookstone Value Stock ETF

Fund Description

BAMV actively selects US companies with strong value based on external and internal research. It selects both mid- to large-cap stocks.

FactSet Analyst Report

BAMVs objective is to provide capital appreciation by actively investing in the equity stocks of US companies believed to offer strong value. Mid- or larger-cap companies are screened and favored. These companies are then analyzed using external and internal research done by the funds adviser by considering its current and expected growth, reputation, relevance to investors, and third-party financial ratings of potential investments. Approximately 30 high-quality value-oriented stocks are selected, all of which are either below their fundamental fair value or are reasonably priced. Note that the fund may tilt to certain sectors due to greater value stocks exposure. BAMV launched alongside its sister fund, BAMG, which instead offers growth stocks exposure.