

BASG

Brown Advisory Sustainable Growth ETF

Fund Description

BASG seeks capital appreciation by actively managing a narrow portfolio of US mid- and large-cap growth companies. Selected securities are believed to not only demonstrate strong fundamentals but also implement sustainability strategies.

FactSet Analyst Report

BASG targets US growth companies in the mid- and large-cap equity space. Stock selection focuses on those believed to have the potential to outperform peers due to solid financials, consistent earnings growth, and strong cash flows. Additionally, these stocks leverage sustainability strategies to enhance their financial performance via cost savings, revenue growth, or improved franchise value. Portfolio will typically hold 25 to 45 holdings. Up to 15% of the assets may be allocated to foreign securities, including emerging markets. Investments may include REITs and small-cap stocks. Positions may be sold if the investment thesis breaks down, if better opportunities arise, or if the stock becomes overvalued.