

BLCR

iShares Large Cap Core Active ETF

Fund Description

BLCR is an actively managed fund of attractively valued large-cap equity securities selected through fundamental and quantitative analysis. It primarily holds US companies but may invest in foreign securities up to 25%.

FactSet Analyst Report

BLCR is designed to provide core exposure primarily to the US large-cap equity market, with the possibility of holding foreign securities and ADRs up to a quarter of the portfolio which gives it a global reach. It invests in common stocks and derivatives of the same characteristics, as well as in IPOs of attractively valued companies that are believed to represent good, long-term investment opportunities. The market-cap of the eligible securities must be within the range of those included in the Russell 1000 to ensure proper size exposure. Constituents are then selected and managed by the adviser in an active manner whilst considering both fundamental and quantitative insights. Note that during adverse market conditions, the fund may enter temporary defensive positions and invest up to 100% in liquid, short-term investments. Derivatives including options, futures, swaps, and forwards may also be utilized to increase fund return. Prior to October 10, 2024, the firm used BlackRock instead of iShares for branding purposes.