

BLUC

Bluemonte Large Cap Core ETF

Fund Description

BLUC provides exposure to large-cap companies through a fund-of-funds approach. The actively managed fund uses both a top-down and bottom-up approach to select equities.

FactSet Analyst Report

BLUC seeks capital growth by investing in unaffiliated funds with exposure to large-cap companies. The underlying funds may be passively or actively managed, investing in US and/or non-US companies of any investment style, including both value and growth. The fund employs a top-down approach, utilizing macro analysis. Through a fundamental analysis, the fund then employs bottom-up research to select funds consistent with its target. The sub-adviser identifies and determines its desired allocation mix and return profile, selecting funds believed to represent an asset class, are reasonably priced, and reflect relative performance when compared to similar ETFs. In assessing actively managed ETFs, the fund-of-funds performs additional analysis of the quality and tenure of an underlying funds management. As an actively managed ETF, the fund manager has full discretion to adjust the portfolio at any time.