

BLUX

Bluemonte Dynamic Total Market ETF

Fund Description

BLUX is a fund-of-funds with broad exposure to the US equity total market. It is an actively managed portfolio utilizing a top-down and bottom-up approach to security selection.

FactSet Analyst Report

BLUX seeks growth of capital through investments in shares of unaffiliated ETFs. It provides exposure to the domestic equity market by actively managing a portfolio of funds primarily invested in US companies. To back its total market claim, the fund-of-funds is diversified by market-cap, allowing exposure to small-, mid-, and large-caps. There are no limitations on investment styles or other factor tilts such as growth, value, and quality. In selecting constituents, the fund utilizes a combination of top-down and bottom-up investment approach to identify securities believed to be reasonable representatives, priced fairly, and reflects relative performance in comparison to similar ETFs. Note, however, that due to the funds active management, final investment decisions are at the discretion of the adviser, which may or may not include exposure to international securities.

