

BRIF

FIS Bright Portfolios Focused Equity ETF

Fund Description

BRIF actively selects US large-cap stocks based the advisers definition of upholding Christian values combined with an assessment for growth at a reasonable price.

FactSet Analyst Report

BRIF is an actively managed ETF focusing on US large-cap companies, utilizing a proprietary methodology to invest during their profit cycles, targeting valuation or multiple expansion through price-to-earnings ratios. The fund manager evaluates economic trends, market conditions, technical analysis, and combines fundamental and qualitative research to consider a companies investment potential, ensuring overall broad diversification of the portfolio. Applying a Christian values overlay, the sub-adviser avoids investments conflicting with such values, utilizing third-party research and proprietary Bright Score to align with the values concerning issues like abortion and pornography. The portfolio, aiming for 30-50 companies, is monitored to avoid concentration risks, with potential stock sales due to price movements, performance, or shifting valuation prospects, acknowledging performance variance against non-aligned funds.