

BROL

Baron Risk Optimized Large Cap ETF

Fund Description

BROL is an actively managed fund of US large-cap companies selected using fundamental research with quantitative modeling tools. The fund seeks capital appreciation.

FactSet Analyst Report

BROL provides diversified exposure to the US equity market, primarily in equity securities of US large-cap companies within the S&P 500 Index range. It focuses on businesses with growth potential, competitive advantages, exceptional management, and attractive valuations. The investment process combines fundamental research with quantitative modeling to evaluate growth, diversification, beta, tracking error, and risk factors in portfolio construction. The adviser also considers factors such as integrity, strategic vision, operational competence, shareholder alignment, and track record to assess company management. The fund is actively managed and seeks to provide returns that differ from the index rather than replicate its performance. Quantitative tools are used to monitor risk and diversification in pursuit of the funds investment objectives.

