

CGBL

Capital Group Core Balanced ETF

Fund Description

CGBL is an actively managed fund-of-funds that offers a balanced approach to total return and capital preservation. The fund employs an active asset allocation strategy to invest in equities, debts, money market instruments, and cash.

FactSet Analyst Report

CGBL seeks to strike a balance, allocating 50% to 75% of the portfolio in equities, and at least 25% to debt securities, while the rest goes to money market instruments and cash. Equity positions are selected for their growth potential and/or income generation. Additionally, up to 15% of the equity allocation may come from outside the US. In the fixed-income allocation, the fund relies on fixed-income ETFs linked to corporate bonds, MBS and ABS, government-sponsored entity securities, and other instruments not backed by full faith. These debts are of any maturity. The specific allocation percentages and fixed-income ETF selections can fluctuate in response to prevailing market conditions and the assessment of the adviser. Note that the fund may have significant exposure to junk bonds. CGBL is managed by a team of managers who aim to select attractively priced securities believed to be promising investment opportunities. Positions are sold if they are no longer considered attractive.