

CVSM

CresAlta Small and Mid-Cap ETF

Fund Description

CVSM is an actively managed SMID-cap ETF focused on financially strong US companies with attractive valuations, improving fundamentals, and long-term shareholder value potential.

FactSet Analyst Report

CVSM focuses on US small- and mid-cap companies the adviser believes are undervalued, financially strong, and improving fundamentally. The investment process combines proprietary screening tools, valuation analysis, and bottom-up company research to identify businesses with attractive long-term shareholder value potential. The adviser emphasizes companies with lower debt levels, improving operating trends, strong competitive positioning, and management teams with a history of creating shareholder value. The strategy also incorporates forensic accounting analysis to identify potential balance sheet or cash flow concerns before investing. The portfolio typically holds 4060 companies diversified across sectors and seeks to capitalize on opportunities that may arise from thinner analyst coverage and market inefficiencies within the SMID-cap universe.

