

DFAR

Dimensional US Real Estate ETF

Fund Description

DFAR is actively managed to invest in US companies whose principal activities are engaged in the broad real estate sector, including REITs. Portfolio holdings are weighted by market capitalization.

FactSet Analyst Report

DFAR provides active management to investing in broad US real estate companies. Portfolio managers evaluate companies involved in the ownership, management, development, construction, or sale of residential, commercial, or industrial real estate. A company must generate at least 50% of their revenue or have 50% of the value of their assets, invested in one of these areas. The portfolio will also hold real estate investment trusts (REITs) or like entities. Partnerships involved in commercial property development are excluded. Securities selected are evaluated based on several factors, such as free float, stock momentum, liquidity, size, relative price, profitability, and costs. Once selected for the portfolio, holdings are market-cap weighted. Due to the active management, the fund may have a higher portfolio turnover than index funds for this space. Derivatives may be used to leverage exposure or manage cash. Lending of portfolio securities is permitted to generate additional income.

