

DFUS

Dimensional U.S. Equity ETF

Fund Description

DFUS actively selects US equities of all sizes weighted by market capitalization in seeking to provide long-term capital appreciation.

FactSet Analyst Report

DFUS is part of Dimensionals expansion plan of converting six mutual funds into ETFs. It is an actively managed fund that primarily aims to achieve long-term capital appreciation while minimizing tax impact. The fund holds a diversified portfolio of US companies of all market capitalizations across a broad range of sectors. While the fund claims to be market-cap-weighted, the advisor has the discretion to toggle with a companys exposure after taking into account several factors like free float, momentum, trading strategies, liquidity, size, relative price, profitability, investment characteristics, including additional determinants such as financial ratios that the advisor deemed applicable. DFUS utilizes the same investment strategy as its original mutual fund counterpart.