

DXUV

Dimensional US Vector Equity ETF

Fund Description

DXUV is an actively managed, broad portfolio of US companies, with an increased exposure to firms with smaller capitalization, lower relative price, and higher profitability.

FactSet Analyst Report

DXUV seeks long-term capital appreciation by actively managing a diversified portfolio of US equity securities, focusing on companies with smaller capitalizations, lower relative prices, and higher profitability. It integrates research, portfolio design, management, and trading to achieve its objectives. The selection process begins with a market-cap-weighted universe of eligible US firms of any market capitalization. In assessing relative price and profitability, the adviser reviews fundamental factors, such as price-to-book value, price-to-earnings, price-to-cash flow, earnings-to-book value, and earnings-to-assets ratios. However, these criteria are subject to change from time to time. The adviser aims for broad diversification and adjusts exposure based on short-term criteria like price momentum, short-run reversals, and investment characteristics. Additionally, the fund may use futures contracts and options to manage market exposure.