

EDGU

3EDGE Dynamic US Equity ETF

Fund Description

EDGU is an actively managed fund-of-funds, investing in US equity securities with a focus on sector and market capitalization selections. The fund adjusts its portfolio in response to U.S. economic trends and indicators of market performance.

FactSet Analyst Report

EDGU focuses on equity securities of US companies, adjusting its portfolio to capitalize on growth opportunities while mitigating losses in declining markets. The fund emphasizes sector selection and market capitalization variation based on US economic trends. EDGU uses a proprietary model that combines valuation metrics, economic indicators, and investor sentiment to assess sector and style potentials within the US market. Its strategy includes dynamic portfolio rebalancing to align with changing market conditions, focusing on both growth and value investment styles. The fund selectively invests in sectors and individual securities perceived as undervalued or likely to benefit from market catalysts. Similar to EDGI, EDGU may utilize a fund of funds strategy, investing in equity ETFs to implement its sector and allocation viewpoints. Security selection and weighting are based on analysis of sector performances and economic forecasts to enhance growth while limiting risks.

