

EFFI

Harbor Osmosis International Resource Efficient ETF

Fund Description

EFFI is actively managed, investing in large-and mid-cap public companies considered highly resource-efficient. Portfolio holdings are selected from developed markets outside the US and weighted by efficiency score, optimizing to outperform its benchmark.

FactSet Analyst Report

EFFI is actively managed investing in resource-efficient companies. These companies are characterized by lower carbon emissions, reduced water consumption, and minimal waste generation. The fund uses a proprietary quant strategy based on resource efficiency scores to predict companies that may outperform the MSCI World ex-US Index. It involves scoring companies relative to their sector peers on publicly reported carbon emissions, water use, and waste production. Companies in the financial sector do not receive scores because they are considered resource-efficient. Additionally, it does not invest in companies that breach the United Nations Global Compacts social and governance safeguards. The fund typically holds 70 to 90 equities, selected from the MSCI World ex US Index, having resource efficiency scores ranking within the top three quintiles compared to other evaluated companies within their respective sectors. Holdings are rebalanced monthly.