

EPIN

Harbor International Equity ETF

Fund Description

EPIN is actively managed to invest in equity securities of companies in developed markets outside the US, utilizing a disciplined approach to identify undervalued stocks with strong fundamentals. The fund aims for long-term total return.

FactSet Analyst Report

EPIN primarily focuses on investing in a concentrated portfolio of developed market equities outside the US. The fund typically holds 40 to 70 companies across various sectors and market caps. Its approach involves a disciplined, bottom-up stock selection process that emphasizes strong business fundamentals such as revenue growth, profitability, manageable debt, and positive earnings prospects that the market may overlook. The fund uses quantitative analysis to manage risks related to value, earnings growth, volatility, and sector biases, aiming to minimize unexpected losses and improve risk-adjusted returns. Sector weights are influenced by individual stock opportunities rather than fixed allocations. EPIN may also have limited exposure to emerging markets and can hold securities in different currencies, including ADRs and GDRs. Its goal is long-term growth.