

EPRE

First Trust TCW ESG Premier Equity ETF

Fund Description

EPRE is an actively managed ETF that invests in US companies that meet certain environmental, social and governance criteria.

FactSet Analyst Report

The last day of trading on an exchange is October 26, 2022. EPRE uses a proprietary framework to select US companies by measuring them up to meet environmental, social and governance standards against their peers. The fund mainly invests in companies of any size that are perceived to be enduring and cash-generating. Using publicly reported data, the fund assigns each company an ESG Fundamental Score that indicates performance and an ESG Disclosure Score that indicates the amount of information a company discloses. The funds advisor conducts a fundamental analysis to identify predictable growth businesses with high barriers to entry that are also generating consistent free cash flow. Additionally, securities go through qualitative and quantitative screening criteria with a focus on companies perceived to trade at prices below their intrinsic value. As an actively managed fund, the portfolio managers can make buy, sell, and hold decisions at their discretion. The fund also may invest in IPO companies and SPACs.

