

EPSV

Harbor SMID Cap Value ETF

Fund Description

EPSV is actively managed, investing in 40-70 undervalued small- and mid-cap companies in the US, selected using fundamental research. The fund seeks total return.

FactSet Analyst Report

EPSV is an actively managed fund offering segmented exposure to the US equity small- and mid-cap value market. The funds adviser begins the portfolio construction process by considering all constituent securities of any value index as defined by FTSE Russell. Using a bottom-up investment approach, employing fundamental and qualitative criteria, the funds adviser evaluates and selects investments. Statistical analysis and ESG considerations may also be utilized to determine and manage specific risks. EPSV will comprise 40-70 value stocks while seeking total return.