

# EUSM

## Eventide US Market ETF

### Fund Description

EUSM is an actively managed fund that invests in US stocks of any market capitalization selected based on fundamental research and company values-based screening. The fund targets companies the adviser believes reflect moral values while creating stakeholder value.

### FactSet Analyst Report

EUSM seeks long-term capital appreciation through an actively managed portfolio of US firms the adviser believes create value for stakeholders. The fund also aims to limit tracking error to a US total equity market benchmark. To construct the portfolio, the fund adviser utilizes a values-based screening inspired by Christian faith and biblical worldview, along with fundamental research. The fund targets companies that respect value and freedom of all people, demonstrate concern for justice and peace, promote family and community, exhibit responsible management, and practice sustainability. The portfolio generally consists of 100 companies across market capitalizations, typically within the range of the strategy benchmark. The adviser monitors and adjusts security weights using research and quantitative modeling tools in order to improve benchmark tracking. The fund may invest up to 20% in foreign securities.

