

FORH

Formidable ETF

Fund Description

FORH seeks long-term capital appreciation by actively managing a multi-strategy approach to providing alternative exposure, include tail hedge.

FactSet Analyst Report

FORH mainly holds equity securities but pursues a broad range of investment strategies that cut across asset classes and styles. The investment process begins by identifying investment themes and market inefficiencies in order to provide uncorrelated returns to those of the broad equity and fixed income markets. Specifically the adviser considers market segments, products, and services positioned to benefit from innovative developments in commerce. Both quantitative and fundamental analysis along with valuation and technical considerations is utilized to make individual stock buy and sell decisions. The fund may also use derivatives, including options and volatility-linked ETFs or ETNs, to protect against market declines.