

GEOA

WisdomTree GeoAlpha Opportunities Fund

Fund Description

GEOA tracks an index that provides exposure to companies of various market capitalization from around the world. The fund selects and weights investments based on fundamentals and opportunities from geopolitical shifts.

FactSet Analyst Report

GEOA tracks an index of companies from around the world that are expected to benefit from geopolitical shifts. Companies meeting market-cap and liquidity requirements are selected based on four trends: 1) Geopolitical Events (25-50% allocation), including companies benefiting from supply chain changes, tax policies, defense spending, alliances, or trade and tariff policies, 2) Fiscal and Monetary Policy Shifts (5-25%), for companies positioned to gain from interest rate changes, fiscal spending, or currency interventions, 3) Technological Innovation (5-25%), for firms delivering new or transformative tech-enabled products or services, and 4) Shifting Consumer Preferences (5-15%), for those benefiting from changing global consumer habits. The portfolio is weighted by market cap, liquidity, and relevance to these trends, capped at 5% per constituent. The index is rebalanced and reconstituted quarterly.



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