

HDUS

Hartford Disciplined US Equity ETF

Fund Description

HDUS is passively managed to invest in a broad portfolio of US large-cap stocks that target balanced exposures across value, momentum, and quality factors at lower volatility level, while controlling overall active risk factors.

FactSet Analyst Report

HDUS aims to outperform the broader US large-cap equity market through a multi-factor strategy. Starting with the largest 1,000 US companies by market-cap, the underlying index applies a rules-based, proprietary methodology that utilizes an optimization process to target balanced exposures across value, momentum, and quality factors, while seeking to enhance dividend yield at a lower volatility level. Additionally, the index integrates a comprehensive risk framework to the overall portfolio construction in order to control the active risk factors relative to the broader market capitalization-weighted universe. The portfolio typically holds 300-400 securities. Although, the components, number of holdings, and industry exposures may change over time. The index reconstitutes and rebalances semi-annually. HDUS utilizes the same investment strategy as its actively managed mutual fund counterpart, the Hartford Disciplined Equity HLS Fund (ticker: HIAGX).