

# HEET

## Hartford Schrodgers ESG US Equity ETF

### Fund Description

HEET is an actively-managed portfolio that seeks long-term capital appreciation by targeting US companies assessed for ESG, value, profitability, momentum and low volatility.

### FactSet Analyst Report

HEET actively selects US firms that meet certain environmental, social and governance criteria and have exposure to factors including but not limited to value, profitability, momentum, and low volatility. The portfolio consists of companies of all sizes, but tilts to large-cap stocks. Selection begins with identifying eligible securities by incorporating ESG factors using revenue thresholds and categorical exclusions. Each company is then assessed and monitored using environmental, social, and governance measures that look into their strong environmental and responsible employment practices, impacts on climate change, community sensitivity, and labor standards or corporate governance. The advisor assigns each stock an ESG score, wherein the stocks with the highest overall factor scores receive more weight in the portfolio. Additionally, the fund aims to have at least less than half the carbon footprint of its benchmark - the Russell 1000.

