

IOPP

Simplify Tara India Opportunities ETF

Fund Description

IOPP is an actively managed ETF that invests in Indian equity securities of any market capitalization. The fund targets companies that are expected to benefit from the broad themes capturing India's growth story.

FactSet Analyst Report

IOPP invests in equity securities of Indian issuers positioned to benefit from its key themes relating to the country's growing middle class, sectors with increasing economic participation, and the government's focus on defense, green energy, and exports. The fund invests in Indian companies perceived as high quality with potential for long-term growth and capital appreciation. The actively managed fund invests in companies with no restriction to market capitalization. The portfolio managers use a bottom-up selection process that identifies stocks through company-specific research and analysis. The process starts with 800-1,000 stocks that are screened using multiple factors, such as an evaluation of a company's competitive position, management, growth potential, and track record. Companies are further narrowed down using KPIs, model building, and valuations. To maintain the portfolio and ensure diversification, securities are monitored by tracking news and analyzing quarterly results.