

IRTR

iShares LifePath Retirement ETF

Fund Description

IRTR is a fund-of-funds that seeks to provide a conservative, broad asset allocation through an actively managed portfolio of equity, fixed income, and money market ETFs. The fund is designed for investors looking to retire or begin withdrawing assets in the near future.

FactSet Analyst Report

IRTR is an actively managed fund-of-funds designed for investors expecting to retire or begin withdrawing assets in the near future. It seeks to provide retirement outcomes based on a quantitatively measured risk that investors are willing to accept, given a particular time horizon. The fund adviser employs a multi-dimensional approach that quantifies risk using proprietary measurement tools that analyze historical and forward-looking market data. Underlying funds are selected based on their classifications, historical risk and performance, and relationship to other underlying funds. The fund primarily invests in affiliated, index-tracking ETFs that hold diversified portfolios of stocks, bonds, and money market instruments. IRTR is in its most conservative phase. However, its allocation may change in order to maintain the funds risk profile. This is the fund serves as the most conservative asset allocation in the suite. As other funds reach their retirement date, the remaining assets are rolled into IRTR.



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