

IVSX

Applied Finance IVS International SMID ETF

Fund Description

IVSX is an actively managed ETF focusing on long-term capital appreciation by investing in small- and mid-sized stocks in developed international markets. The fund uses proprietary fundamental analysis to select holdings.

FactSet Analyst Report

IVSX uses proprietary valuation models in researching small- and mid-cap companies in developed markets outside of North America, aiming for growth through fundamental analysis. The funds adviser uses proprietary research, valuation models, and its Intrinsic Value Stewardship (IVS) model to select stocks with strong return potential, considering factors like valuation, growth, profitability, and business strategy. The Fund is actively managed, typically holds at least 150 positions across multiple countries and sectors, but may concentrate more on certain holdings if justified by its research. The adviser sells positions if they no longer offer compelling investment opportunities or become too large relative to the portfolio.

