

IWFG

NYLI Winslow Focused Large Cap Growth ETF

Fund Description

IWFG is an actively managed, non-transparent fund that seeks long-term capital appreciation by targeting US large-cap growth companies. It limits the number of its holdings, selecting only the top growth stocks using a bottom-up investment approach. The fund utilizes the Natixis/NYSE non-transparent model.

FactSet Analyst Report

IWFG actively invests in US large-cap firms believed to provide an opportunity for achieving superior portfolio returns, also known as growth stocks. The fund focuses on a limited number of holdings, typically the top 25-35 perceived growth companies. Eligible securities initially undergo a qualitative assessment which evaluates their non-financial performance with certain ESG factors. The adviser then utilizes a bottom-up approach in stock selection and targets firms that address market growth opportunities, lead in market share, have competitive advantages, high capital returns, and cash flow growth, and exhibit sound corporate governance. Prior to Aug. 28, 2024, the fund name was branded under IndexIQ and used a non-transparent ETF structure.

