

JIVE

JPMorgan International Value ETF

Fund Description

JIVE seeks long-term capital appreciation through an active management that focuses on securities with value characteristics and consideration of ESG factors. The fund invests in stocks of any market capitalization in both developed and emerging markets, excluding the US.

FactSet Analyst Report

JIVE taps into various global markets by investing in undervalued stocks and equity-related securities outside the US. This includes common stock, preferred stock, ETFs, depositary receipts, and REITs. The fund uses fundamental analysis, and behavior-based and quantitative screens to find promising investments. In addition, the advisers analysis relies on their proprietary research, information from companies, data from external vendors, and in-house fundamental research. The belief behind the strategy is that market inefficiencies created by investor behavior can lead to valuation opportunities. The fund may also use derivatives for security substitutes and to manage currency risks and cash flows. Additionally, it considers ESG factors in its assessments but may not prioritize them when opportunities align with its main goal. Stocks are sold in the event of declining fundamentals, if adverse political or economic shifts, or when better investment options arise.



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