

JXX

Janus Henderson Transformational Growth ETF

Fund Description

JXX is actively managed, focusing on 20-30 larger, well-established firms in sectors like AI and healthcare innovation. The fund aims for long-term capital growth by employing a thematic approach to identify growth-oriented companies.

FactSet Analyst Report

JXX employs a focused investment strategy by maintaining a portfolio of around 20 to 30 equity securities, primarily consisting of larger, well-established companies across various sectors, while allowing for the inclusion of foreign securities listed on US exchanges. The fund integrates a bottom-up approach centered on fundamental analysis with a top-down thematic perspective, targeting companies that demonstrate sustainable competitive advantages and long-term growth potential. Investment themes include developments in artificial intelligence, cloud computing, digitization, and healthcare innovation, which may be adjusted as societal trends evolve. The fund actively monitors portfolio holdings, evaluating them for sale if there is deterioration in financial health or a shift in the investment thesis. Overall, the objective remains focused on long-term capital appreciation, with additional income generation pursued through securities lending activities.

