

LITL

Simplify Piper Sandler US Small-Cap PLUS Income ETF

Fund Description

LITL is actively managed, focusing on US small-cap stocks using a proprietary model and option strategies. The fund aims for capital growth and income.

FactSet Analyst Report

LITL employs an actively managed approach to focus on US small-cap stocks, investing primarily in companies within the Russell 2000 Index. The selection process leverages macroeconomic and business cycle analysis, applying proprietary screens to identify and rank stocks based on expected return and liquidity. This methodology results in a diversified portfolio of approximately 200 stocks, reconstructed monthly to adapt to changing market dynamics. The fund also utilizes option spread writing strategies across various asset classes, including options on debt, commodities, and currencies, with investments in options not exceeding 20% of net assets. By combining its selection process with options strategies, LITL seeks to achieve capital appreciation and income while effectively managing risk to align with its investment objectives in fluctuating market conditions.