LIVR
Intelligent Livermore ETF

Fund Description

LIVR seeks long-term capital appreciation through an actively managed portfolio of 60-90 global large-cap companies. Stock selection relies on AI and human synergy.

FactSet Analyst Report

LIVR is designed to be highly dynamic, relying on both AI and human expertise to capitalize on evolving market opportunities. The strategy integrates human insight with AI-powered stock selection to construct a portfolio of global large-cap stocks. Portfolio construction begins with an analyst setting the portfolios parameters, including structure, concentration limits, and thematic inspiration from renowned trading strategies. AI then analyzes datasets to identify four to six major trading trends to choose positions that align with these trends based on key financial metrics such as revenue growth and earnings. Three independent AI models select 20 to 30 stocks to form an equal-weighted portfolio, with no single position exceeding 10%. The selection process combines both quantitative and qualitative analysis. Portfolio rebalancing is done quarterly to ensure compliance. The fund is expected to have a high portfolio turnover rate.