

MFSV

MFS Active Value ETF

Fund Description

MFSV is an actively managed portfolio of US and non-US value stocks of any market capitalization. The fund utilizes a bottom-up fundamental approach to select investments.

FactSet Analyst Report

MFSV seeks capital appreciation by investing in an actively managed portfolio of common stocks deemed as undervalued. The fund may invest in companies of any size but intends to primarily invest in large-caps. It may also invest in foreign securities and concentrate assets in a single industry or sector. Investment decisions are based on a bottom-up fundamental approach, considering financial, market, and economic conditions. The adviser evaluates earnings, cash flows, valuation, momentum, competitive position, management ability, and ESG characteristics among other factors, and may utilize quantitative screening tools. The fund may engage in active and frequent trading, which results in a high portfolio turnover.