

MFUL

Collaborative Investment - Mindful Conservative ETF

Fund Description

MFUL is an actively managed ETF that aims to seek current income using an adaptive, conservative strategy that aims to perform adequately during a recovery. The fund invests in a variety of asset classes using a tactical go-anywhere approach.

FactSet Analyst Report

MFUL is an actively managed fund that seeks current income by investing in a mix of asset classes that utilizes an adaptive, conservative strategy, aimed to perform adequately during a recovery. The fund uses a tactical go-anywhere approach that provides the ability to invest in a broad spectrum of investment styles (blend, growth, income, etc.) among stocks and bonds of any size, credit quality, maturity, or country. The fund utilizes a proprietary technology that analyzes the price of securities and ETFs to identify trends. A composite score is created for each potential investment, and recommendations are made when to buy, sell or hold each security. The fund is expected to hold between 10 to 20 securities. During unexpected market events, the proprietary technology may signal a move to cash or ultra-short duration ETFs.

