

NZRO

Strategy Shares Halt Climate Change ETF

Fund Description

NZRO is an actively-managed portfolio of environmentally-friendly companies around the world, focusing on solving climate change through carbon reduction.

FactSet Analyst Report

NZRO actively targets global companies committed to addressing the effects of climate change, while focusing on reducing carbon emissions. It selects sustainable and eco-friendly firms that either derive at least 50% of their profit from advancements towards low carbon, pledge to combat climate change by going carbon emission-free, or implement business practices in response to climate change through fossil fuel transition. Constituents are then weighted based on their risk return potential, assessed through various fundamental factors, including a company's financial statements, business model, credit metrics, financial ratios, valuations, and other company-specific characteristics such as sector, industry, and market-cap. An ESG screening also takes place wherein companies involved with the extraction, development or transportation of oil, gas or other fossil fuels are removed. NZRO is for climate-conscious investors seeking long-term capital appreciation.

