

RHRX

RH Tactical Rotation ETF

Fund Description

RHRX is a fund-of-funds that utilizes sector rotation strategies in its attempt to capitalize on changes in the business cycle. The fund is actively managed.

FactSet Analyst Report

RHRX seeks capital appreciation by investing in ETFs that generally hold equities, preferred stocks, and convertible preferred stocks of any market capitalization. The funds advisor utilizes sector rotation strategies that aim to balance the underlying funds around a variety of specific sectors depending on market conditions. In some circumstances, if too few sectors are invested, sector weighting may include a large allocation to cash. The advisor also uses an investment model to analyze market trends based on price momentum, volatility, recession model, and comparative index indicators. The model enables RHRX to switch to defensive investments when it indicates a negative market trend. Such defensive position may include ETFs holding Treasuries, ETNs, leverage and inverse ETFs, and cash. Prior to November 8, 2021, RHRX was formerly a mutual fund called Adaptive Tactical Rotation Fund with \$27 million in assets.