

RSMC

Rockefeller U.S. Small-Mid Cap ETF

Fund Description

RSMC is actively managed, aiming for long-term capital growth by investing in equity securities of small- and mid-cap firms in the US. The fund targets companies with strong growth potential and attractive valuations, focusing on diverse sectors.

FactSet Analyst Report

RSMC focuses on achieving long-term capital growth through an actively managed investment strategy centered on US small- and mid-cap equity securities. The fund primarily targets companies that are either organized in the US or significantly engaged in business activities within the country. This approach allows RSMC to tap into a diverse range of growth opportunities within the small- and mid-cap segment. The fund emphasizes the selection of companies with a strong growth trajectory, competitive advantages, and solid balance sheets, conducting analysis of market and financial data to inform buy, sell, and hold decisions. RSMC may hold securities of companies outside the specified market cap range, aiming for flexibility in its investment approach. While the fund occasionally concentrates its investments in specific sectors, it aims to avoid excessive exposure to any single industry. RSMC seeks to navigate market conditions while capturing growth potential.

