

SAMT

Strategas Macro Thematic Opportunities ETF

Fund Description

SAMT is an actively managed fund of US stocks that seeks to outperform the broader market by providing exposure to multiple macro-thematic market trends.

FactSet Analyst Report

SAMT seeks long-term capital appreciation through macro-thematic investing. The fund invests in US stocks of any size that are considered highly correlated to macro-thematic trends. The adviser defines macro as a top-down analysis which focuses on the overall economy, government fiscal and monetary policy changes, cultural and socioeconomic trends, and developments arising from global crises including pandemics, wars, or financial distress. Whereas, thematic refers to trends or views that are considered as, or likely to be prevalent in the market. The fund typically invests in three to five equally-weighted macro-thematic trends, identified using a research-driven approach. Individual securities for each determined trend are then selected based on various analytical tools. Investors should note that the funds active mandate allows it to rotate in and out of trends and securities over time, considering shifts in macro trends as well as their risk/return profiles.

