

SFTY

Horizon Managed Risk ETF

Fund Description

SFTY is actively managed, seeking exposure to US large-cap equities, while shifting to short-term fixed income securities in times of heightened market volatility. The fund also utilizes tactical options strategies as part of its approach.

FactSet Analyst Report

SFTY seeks to capture gains in the US large-cap equity market while limiting downside risk through its proprietary Risk Assist strategy. The strategy adjusts based on market conditions, participation in equities during bull markets, downside mitigation in stress markets, and enhanced returns via tactical options strategies. Stock selection blends economic, quantitative, and fundamental analysis, targeting securities with the highest expected return relative to risk. However, assets may reallocate partially or entirely into US Treasury and cash equivalents during rising volatility. The fund uses FLEX options, primarily put spreads in stable or rising markets to generate income and hedge against market declines. The options strategy may increase volatility and lag in downturns, though losses are capped through purchased puts. The fund may also use single-stock options, covered calls, cash-secured puts, spreads, straddles, collars, and naked options.