

SWP

SWP Growth & Income ETF

Fund Description

SWP actively selects income-producing companies in the US that exhibit quality characteristics. It selects securities of any capitalization but significantly focuses on the large-cap spectrum.

FactSet Analyst Report

SWPs objective is to provide long-term capital appreciation with the secondary goal of providing income. It does so by actively investing in income-producing companies in the US equity market. The fund focuses on companies that have consistent profit margins and earnings growth while providing a history of paying stable dividends. The securities are actively managed but are selected using macroeconomic, fundamental, and technical analysis. The fund will primarily hold US companies, but it may invest in foreign issuers including ADRs and foreign securities traded on US exchanges. It may also hold companies of any size but is expected to substantially invest in large-caps. Note that the fund may tilt to certain sectors due to greater value stock exposure. Approximately 30-70 stocks will comprise the fund, all capped at 10% in weighting.