

TSPX

Twin Oak Active Opportunities ETF

Fund Description

TPSX is an actively managed portfolio of equity and fixed-income securities. The fund seeks long-term capital appreciation and utilizes a combination of bottom-up research and top-down analysis.

FactSet Analyst Report

TSPX is a high-conviction, non-diversified fund that aims to provide capital appreciation by investing in a mix of equities and fixed-income securities across the globe. The portfolio may include equity securities of any market capitalization and government or corporate bonds with varying maturities and credit qualities. For fixed income, the fund may invest directly in fixed-income securities or utilize other ETFs. The fund employs a bottom-up research approach driven by fundamental analysis of individual securities, as well as top-down analysis to manage the overall portfolio characteristics and risks. The fund is opportunistic, the adviser has the discretion to adjust equity and fixed-income allocations at any given time. The adviser reserves the right to invest all assets in one asset class depending on market conditions. The fund may also hold cash and cash equivalents or money market instruments for temporary defensive purposes.