

UPSD

Aptus Large Cap Upside ETF

Fund Description

UPSD is an actively managed portfolio of large-cap US companies selected for their quality, value, and growth characteristics. It seeks enhanced total returns by layering additional return drivers.

FactSet Analyst Report

UPSD seeks total returns exceeding that of the S&P 500. It actively invests in US large-cap companies selected for their good quality, value, and growth traits, and weighted to minimize volatility. It also will invest in Treasury bills and/or box spreads to provide cash return on collaterals used for the derivatives employing either standard exchange-listed options or FLEX options. The fund aims to outperform the SPX during up-market and manage downside exposure during unfavorable conditions by utilizing futures or total return swaps that implement a systematic trading strategy, as well as collect put option premiums during favorable conditions.